

# 2021 Global Tourism Watch Highlights Report



**United States**

Canada



**Global Tourism Watch**



# Study Overview: United States Market

The target population are residents aged 18 years and older, who have a valid passport or intend to obtain one and who have taken an out-of-state pleasure trip, where they had stayed at least 1 night in paid accommodation in the past 3 years, or plan to take such a trip in the next 2 years.



## Timing of Fieldwork



**2021**

Note: this study is conducted annually. Significant differences from the last wave in November 2020 are identified with ▲ / ▼.



## Geographical Definition for Qualified Trips

**Out-of-state**



## GTW Sample Distribution

|                            |                 |
|----------------------------|-----------------|
| Sample distribution:       | <b>National</b> |
| Recent visitors to Canada: | <b>1,378</b>    |
| Other travellers:          | <b>6,427</b>    |
| Total sample size:         | <b>7,805</b>    |

|                            |                           |
|----------------------------|---------------------------|
| Sample distribution:       | <b>Border<sup>1</sup></b> |
| Recent visitors to Canada: | <b>546</b>                |
| Other travellers:          | <b>1,817</b>              |
| Total sample size:         | <b>2,363</b>              |

|                            |                                |
|----------------------------|--------------------------------|
| Sample distribution:       | <b>Near Border<sup>2</sup></b> |
| Recent visitors to Canada: | <b>322</b>                     |
| Other travellers:          | <b>1,744</b>                   |
| Total sample size:         | <b>2,066</b>                   |

|                            |                          |
|----------------------------|--------------------------|
| Sample distribution:       | <b>South<sup>3</sup></b> |
| Recent visitors to Canada: | <b>510</b>               |
| Other travellers:          | <b>2,866</b>             |
| Total sample size:         | <b>3,376</b>             |

<sup>1</sup> Border states include: Idaho, Maine, Michigan, Minnesota, Montana, New Hampshire, North Dakota, Vermont, Washington, and New York.

<sup>2</sup> Near border states include: Connecticut, Delaware, District of Columbia, Illinois, Indiana, Iowa, Maryland, Massachusetts, New Jersey, Ohio, Oregon, Pennsylvania, Rhode Island, South Dakota, Wisconsin, and Wyoming.

<sup>3</sup> South states include: Alabama, Alaska, Arizona, Arkansas, California, Colorado, Florida, Georgia, Hawaii, Kansas, Kentucky, Louisiana, Mississippi, Missouri, Nebraska, Nevada, New Mexico, North Carolina, Oklahoma, South Carolina, Tennessee, Texas, Utah, Virginia and West Virginia.

# Market Overview

It is important to consider the results in light of the COVID-19 situation at the time of data collection (October 2021).

## COVID-19 situation in the US

In October 2021, COVID-19 restrictions in the United States varied by state and whether specific locations were under Federal or State jurisdiction. Federally regulated companies had the most stringent restrictions, including mandatory vaccination requirements and masking.<sup>1</sup> There were no vaccine mandates for US citizens travelling by air domestically, but masking on airplanes and within airports was required.<sup>2</sup>

## Outbound travel situation

In October 2021, there were no federal restrictions on travel between US states, however, some states like Hawaii required negative COVID-19 tests and/or proof of vaccination for entry or to avoid quarantine.<sup>3</sup> Opportunities for US travellers to visit international destinations were increasing. Many top competitors were open to fully vaccinated travellers, but required PCR tests on arrival (e.g. Mexico)<sup>4</sup>, while others (e.g. Australia) were closed to visitors.<sup>5</sup> All travellers, including US citizens, were required to provide a negative PCR or antigen test to enter the US.<sup>6</sup>

Canada's borders re-opened to US citizens who were fully vaccinated with a Health Canada approved vaccine on August 9, 2021. All visitors still required a pre-entry COVID-19 molecular test, but quarantine requirements were eliminated for vaccinated travellers.<sup>7</sup>

<sup>1</sup> Forbes, October 2021.

<sup>2</sup> CDC, October 2021.

<sup>3</sup> Washington Post, December 2021.

<sup>4</sup> Schengenvisa News, December 2021.

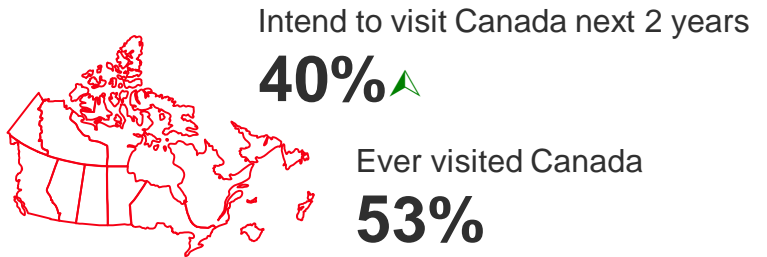
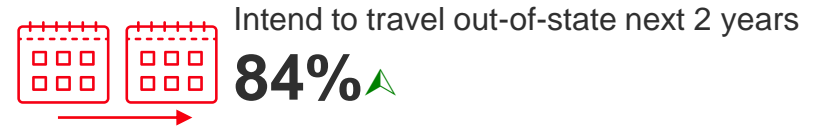
<sup>5</sup> NBC News, October 2021.

<sup>6</sup> CDC, December 2021.

<sup>7</sup> Government of Canada, September 2021.

## Travel Indicators

The US is a mature market with high levels of out-of-state travel and future travel intention. Slightly more than half of US travellers have ever visited Canada.



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

# KEY HIGHLIGHTS

| Insight  | Implication  |
|--|--|
| <p><b>US travellers are ready to travel again.</b> Significantly more US travellers say they miss travel and feel safe travelling now. The likelihood to use all forms of transportation has increased, but comfort levels are highest for domestic air travel.</p>  | <p><i>There is an opportunity to capitalize on US travellers' renewed interest in travel. Many US states are competing for the domestic travel market, so finding ways to differentiate Canada is important in order to convince American travellers that it's worth the hassle to cross the border.</i></p> |
| <p><b>Most COVID-19 concerns, including quarantine requirements, are generally subsiding, but concerns around health and safety measures at a destination persist.</b> Proof of vaccination requirements also remain an important consideration for US travellers.</p>   | <p><i>To attract potential visitors and differentiate Canada from domestic competitors, it is important to communicate Canada's health and safety measures as well as ease of entry for fully vaccinated travellers.</i></p>   |
| <p><b>Travel is the top spending priority for the next year, with US travellers planning to spend more on leisure travel post-COVID-19 than they did pre-COVID-19.</b> Travel outside the US is projected to see the greatest percentage growth in spending and is almost double the anticipated spending on domestic travel out-of-state.</p>   | <p><i>The current prioritization of spending on travel, along with the high anticipated spend on travel outside the US post-COVID-19, presents a strong opportunity for Canada.</i></p>  |
| <p><b>Interest in trying local food and drink as well as several nature-based activities has dropped both generally and on a trip to Canada.</b> However, interest in seeing the Northern lights has remained stable and is now the top activity US travellers would base a trip around. Further, interest in seeing the Northern lights on a trip to Canada is now tied for the top activity.</p> | <p><i>While nature-based activities are still popular for a trip to Canada, interest in some activities is waning. Unique activities such as viewing the Northern lights on a trip to Canada may be a strong lure for US travellers.</i></p>   |
| <p><b>With health related concerns declining, cost has returned as the #1 barrier to visiting Canada.</b></p>  | <p><i>US travellers are cost conscious and Canada must find ways to convince prospective visitors that a Canadian vacation offers good value for money, especially in light of strong domestic competition.</i></p>  |
| <p><b>Late spring is almost as popular as the peak summer months for US travellers considering a visit to Canada.</b> Additionally, many popular vacation activities are as popular in spring as in summer. Historical visitation during the spring is lower than summer months, which suggests there is potential to disperse US visitation into this shoulder season.</p>                        | <p><i>There is an opportunity to disperse US visitation into the spring months by promoting activities that are popular in both the spring and summer months.</i></p>  |
| <p><b>Travel agents and tour operators are playing a growing role in supporting travel from the US to Canada.</b> A majority of potential US visitors now indicate that they are likely to use a travel agent to research or book a trip to Canada.</p>  | <p><i>Building and maintaining relationships with the US travel trade is important to boosting visitation to Canada.</i></p>   |

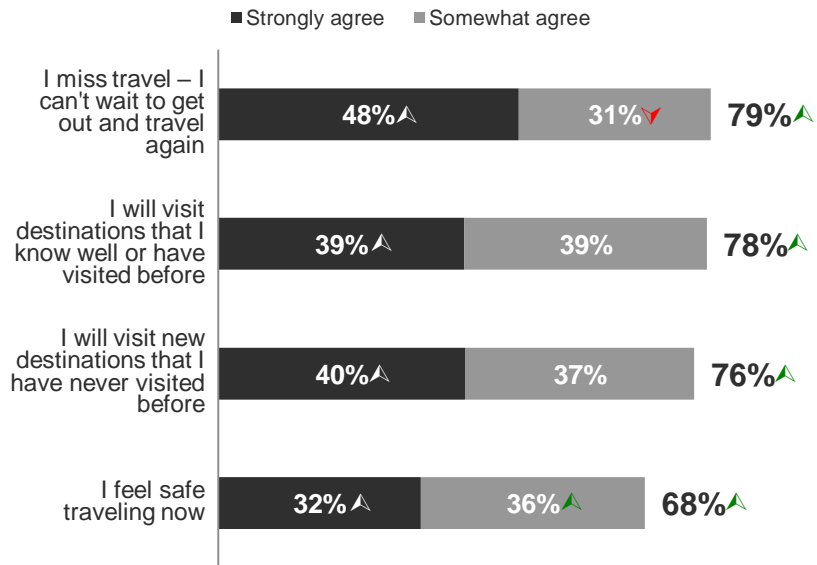


# COVID-19 Considerations

# Attitudes Toward Travel and Transportation Modes

- ▶ There is increasing demand among US travellers, with significantly more saying they feel safe travelling now (68%, up from 32% in 2020). While comfort levels are higher among travellers under 55 years, comfort levels among those 55+ years are not far behind.
- ▶ As COVID-19 restrictions ease, US travellers are also growing more comfortable with using all forms of transportation, especially domestic air travel (61%, up from 39% in 2020).

## Attitudes Toward Travel

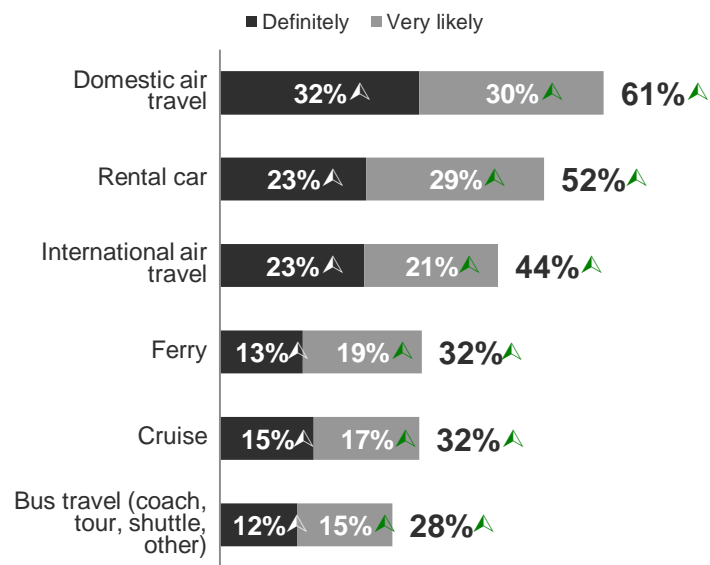


▲ / ▼ Significantly higher/lower than 2020 GTW wave.

Base: Out-of-state pleasure travellers (past 3 years or next 2 years) (n=7805) COV13. Thinking of your next vacation, as government restrictions allow, how much do you agree or disagree with the following statements?

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## Transportation Modes

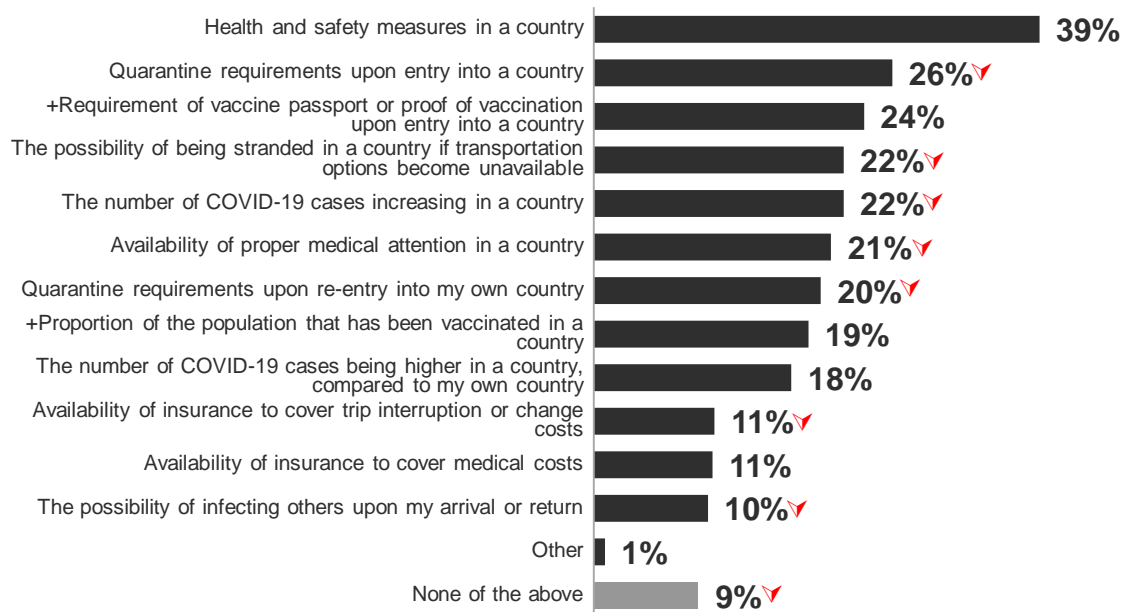


▲ / ▼ Significantly higher/lower than 2020 GTW wave.

Base: Out-of-state pleasure travellers (past 3 years or next 2 years) (n=7805) COV16. As government restrictions allow, how likely are you to use the following modes of transportation?

# Most Important Considerations in Selecting Travel Destination

- ▶ Health and safety measures at a destination remain the top concern for US travellers when selecting a destination. Concerns related to quarantine requirements at the destination and upon return, becoming stranded, COVID-19 caseloads, medical care, and other related COVID-19 concerns are generally dropping. Proof of vaccination is high on US travellers' list of considerations when selecting a travel destination, especially for those 55+ years.
- ▶ In October 2021, there were no quarantine requirements for vaccinated travellers to enter Canada or upon return to the US.



▲ / ↘ Significantly higher/lower than 2020 GTW wave.

+ New statement in 2021 GTW – no trending.

Base: Out-of-state pleasure travellers (past 3 years or next 2 years) (n=7805)

# Key Performance Indicators

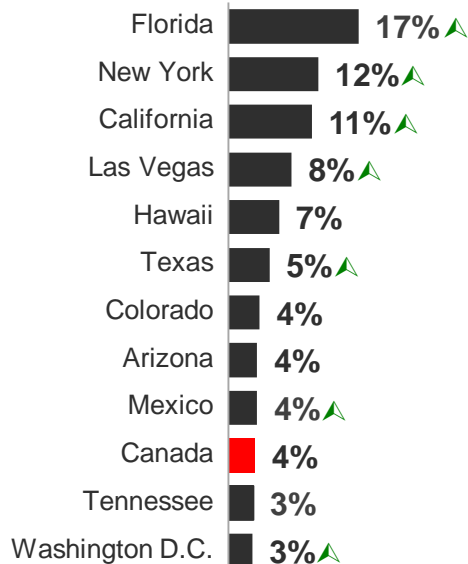


# Unaided Out-of-State Destination Consideration (Next 2 Years)

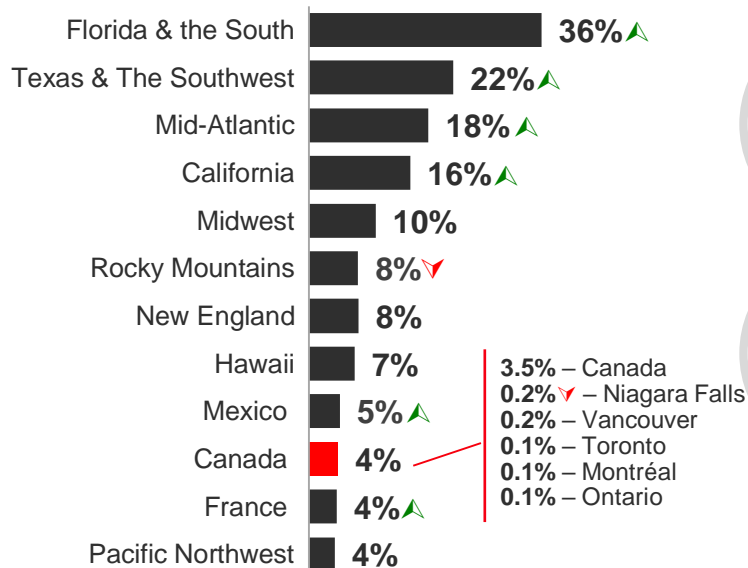
**Unaided consideration** represents the top-of-mind presence of destinations in the consumer mindset and requires travellers to think of destinations without being prompted.

- ▶ Canada is tied with France and the Pacific Northwest as the 10<sup>th</sup> top-of-mind out-of-state destination that US travellers are considering in the next 2 years. Meanwhile, mentions of Florida & the South, Texas & the Southwest, Mid-Atlantic, and California are up significantly compared to 2020, as are mentions of Mexico and France.

## Top 12 Destination Brands<sup>1</sup>



## Top 12 Destination Countries<sup>2</sup>



8% ▲  
Don't know

16% ▼  
Not planning to travel

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

<sup>1</sup> Responses as mentioned by respondents (e.g., percentage who said "Canada" specifically).

<sup>2</sup> Roll-up of brand mentions by country (e.g., percentage who said "Canada" or any destination in Canada).

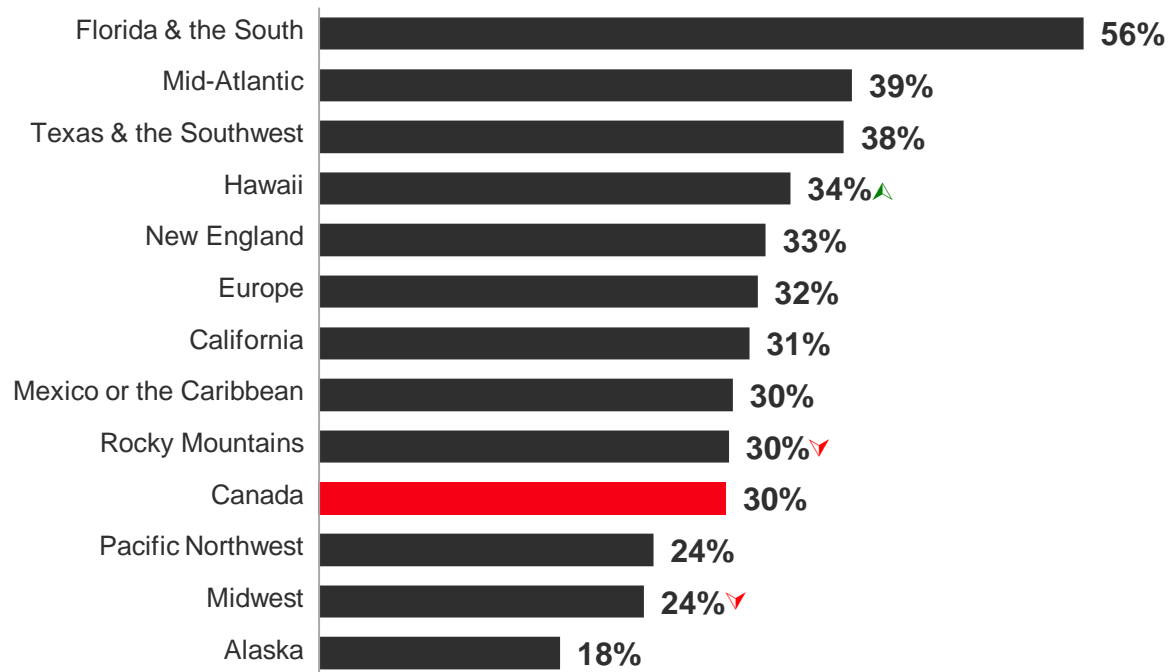
Base: Out-of-state pleasure travellers (past 3 years or next 2 years) (n=7805)

QS8. You mentioned that you are likely to take an out-of-state vacation trip in the next 2 years. Which destinations are you seriously considering? (Please list up to 3 destinations.)

# Aided Destination Consideration (Next 2 Years)

**Aided consideration** represents the proportion of travellers who say they would seriously consider visiting a destination, when prompted with a list of potential destinations. For these travellers, Canada may not be top-of-mind as a destination, but they are considering a visit in the next 2 years.

- ▶ Canada ranks 8<sup>th</sup> on aided consideration – tied with Mexico/Caribbean and the Rocky Mountains. Compared to 2020, consideration for Hawaii is up significantly, while the Rocky Mountains and the Midwest is down.

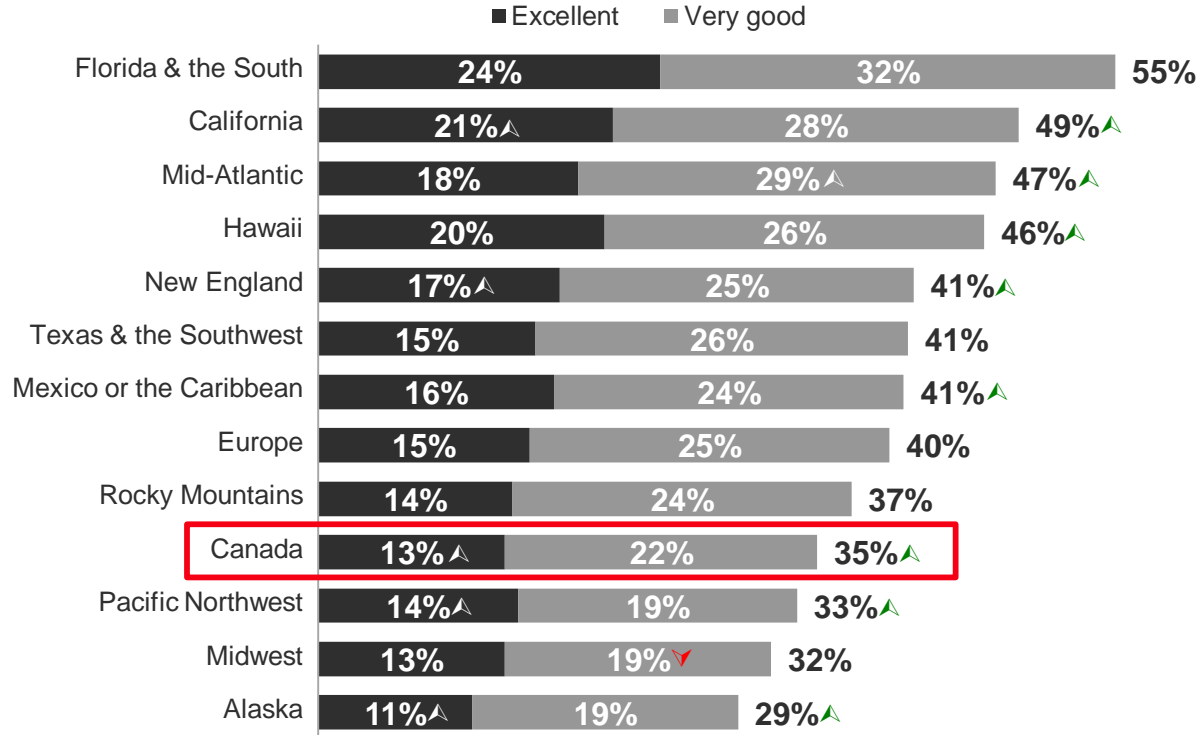


▲ / ▼ Significantly higher/lower than 2020 GTW wave.

Base: Out-of-state pleasure travellers (past 3 years or next 2 years) (n=7805)  
QBVC1. You may have already mentioned this before, but which destinations would you seriously consider visiting in the next 2 years?

# Knowledge of Vacation Opportunities

- With a significant increase in destination knowledge, Canada ranks 10<sup>th</sup> among out-of-state competitors. Several other destinations also saw significant improvements on this metric in 2021.



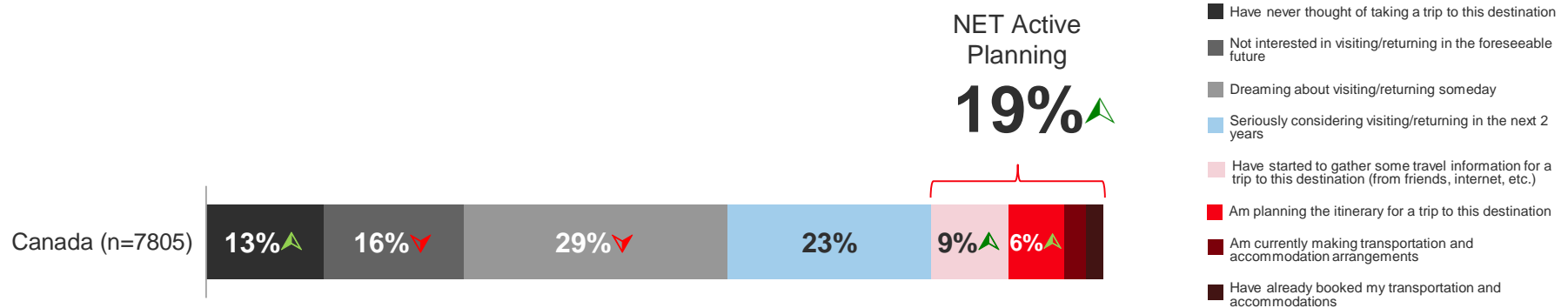
▲ / ▼ Significantly higher/lower than 2020 GTW wave.

Base: Out-of-state pleasure travellers (past 3 years or next 2 years) considering visiting each destination (n=varies)  
QMP3. How would you rate your level of knowledge of vacation opportunities in each of the following destinations? (Select one for each)

# Stage in the Purchase Cycle by Market

*There is a purchasing or decision-making cycle associated with out-of-state travel; consumers move through progressive stages from not knowing anything about a destination to booking a trip. **NET Active Planning** represents the final four stages, or lower funnel, of this path-to-purchase cycle.*

- ▶ Between 18% and 35% of US travellers are in the lower funnel stages of the purchase cycle for Canada's top competitive out-of-state destinations. Canada is tied for 11<sup>th</sup> overall in ranking, with 19% of US travellers in the NET active planning stages for a trip to Canada (up significantly from 2020). While encouraging, this suggests that several destinations are under serious consideration by US travellers and Canada may face a challenge converting interested travellers into visitors, especially since US travellers are domestic-focused.
- ▶ Compared to 2020, US travellers have shifted down the path to purchase, with fewer in the not interested or dreaming stages, and significantly more in the information gathering and itinerary planning stages. This suggests that Canada is having success moving US travellers along the path to purchase.



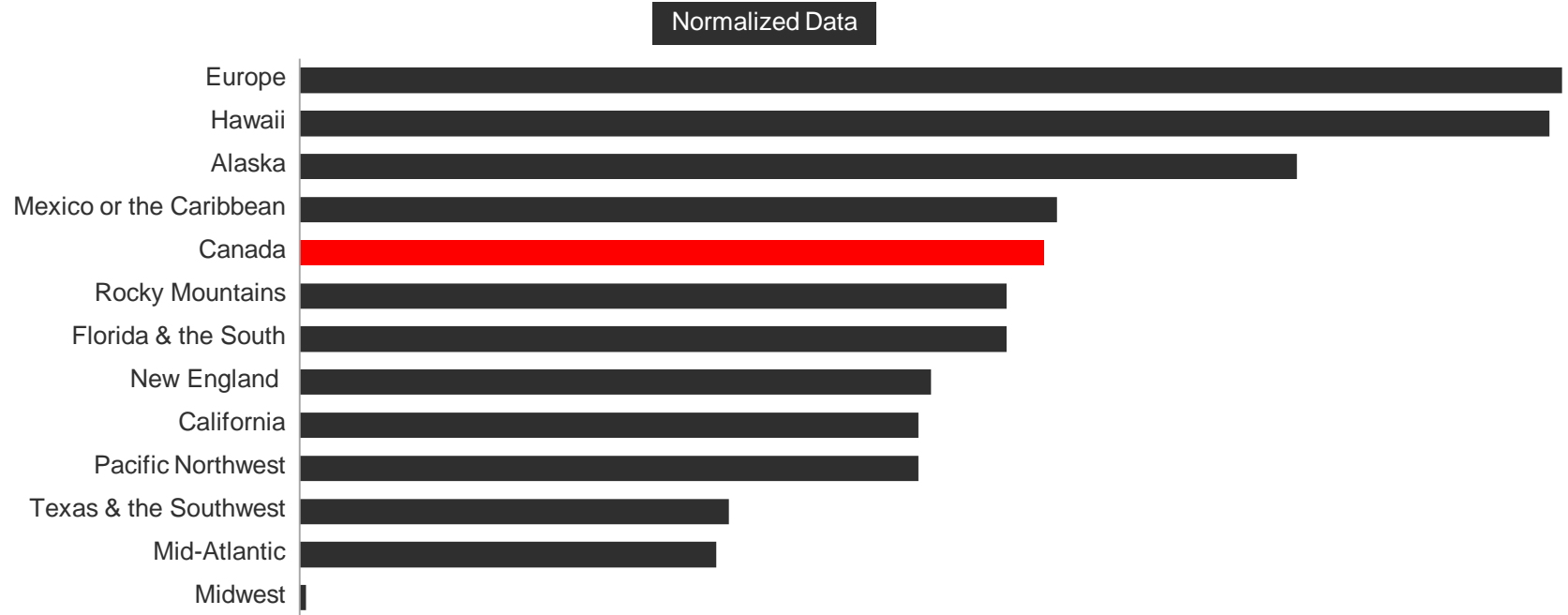
▲ / ▼ Significantly higher/lower than 2020 GTW wave.

Base: Out-of-state pleasure travellers (past 3 years or next 2 years) – note all respondents evaluated Canada plus 2 randomly selected destinations from the competitive set QMP1. Which of the following best describes your current situation when thinking about each of the following destinations for a vacation trip?

# NET Promoter Score (NPS)

*The Net Promoter Score (NPS) measures the likelihood of travellers to recommend a destination. It is an important measure for advocacy, since a high NPS score suggests that those who have visited Canada are more likely to encourage others to visit. Results are gathered among travellers who have ever visited each destination and data has been normalized to indicate relative NPS scores across all competitors.*

► Canada is ranked 5<sup>th</sup> overall, up from the 6<sup>th</sup> spot in 2020.

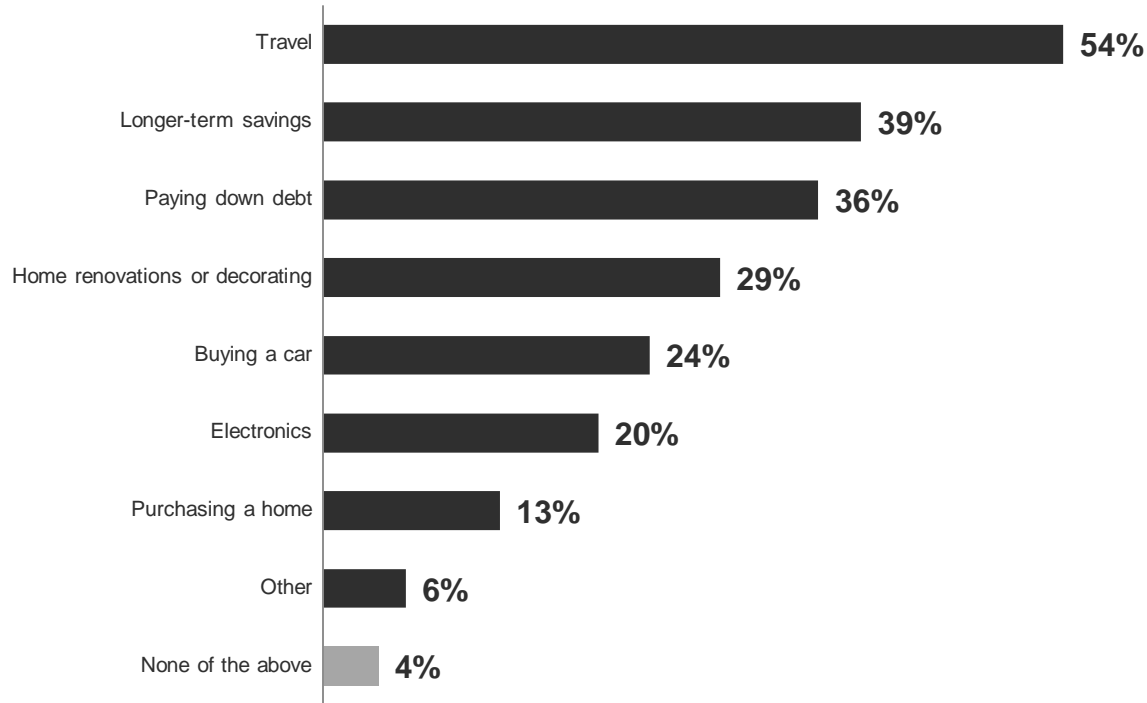


# Travel Spending and Canada Travel Intent



# Spending Priorities for the Next Year<sup>+</sup>

► Travel is the top immediate spending priority for US travellers in 2021, far ahead of secondary priorities such as savings and paying down debt.



<sup>+</sup> New question in 2021 GTW – no trending.

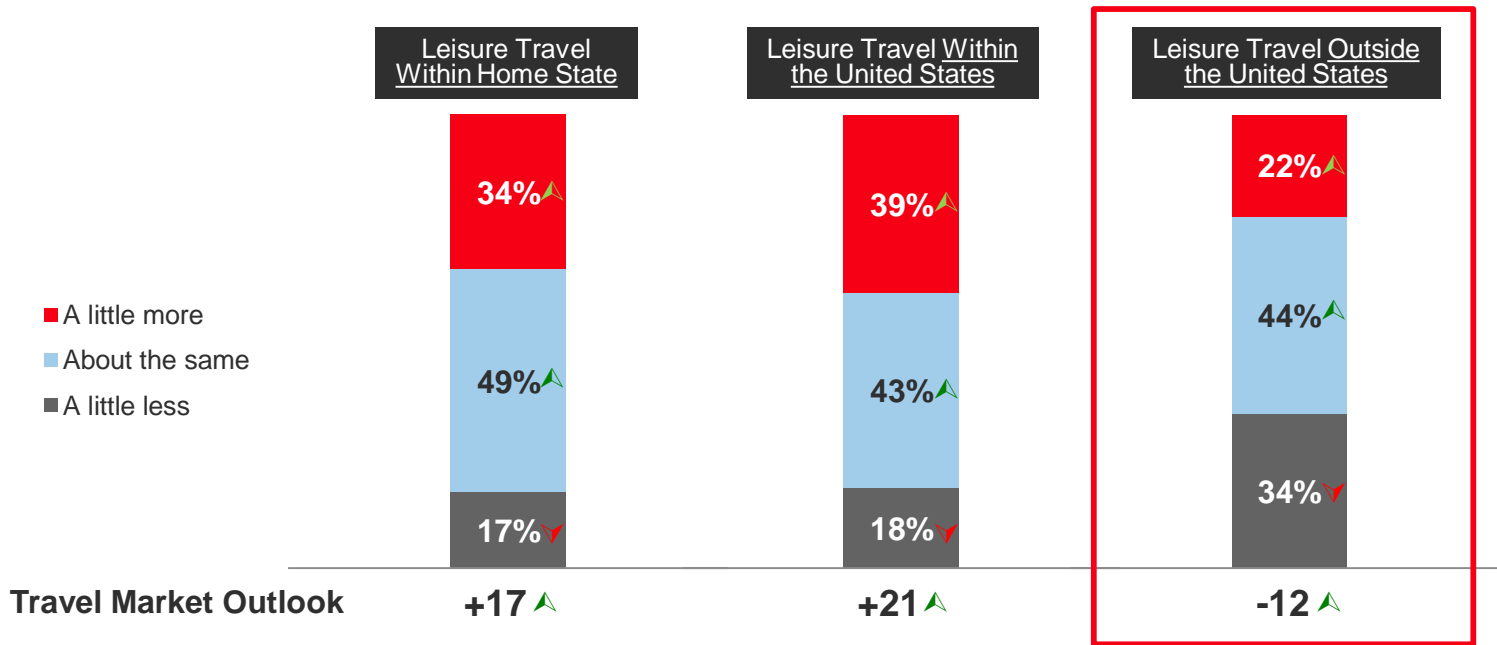
Base: Out-of-state pleasure travellers (past 3 years or next 2 years) (n=7805)

AT. In the next 12 months, which of following will you prioritize spending money on? (Select up to 3 options)

# Travel Spending Intentions (in Next 12 Months)

**Travel Market Outlook** is the difference between the proportion who say they will spend more on travel in the next 12 months than they did in the last 12 months, minus the proportion who say will spend less on travel in the next 12 months.

- ▶ US travellers foresee spending more on all types of travel in the next year than they did in the past year. The outlook for leisure travel within the US is most improved (-15 in 2020 vs +21 in 2021).
- ▶ While the outlook for leisure travel outside the US is still negative (-12), it is significantly improved from 2020 (-38).



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

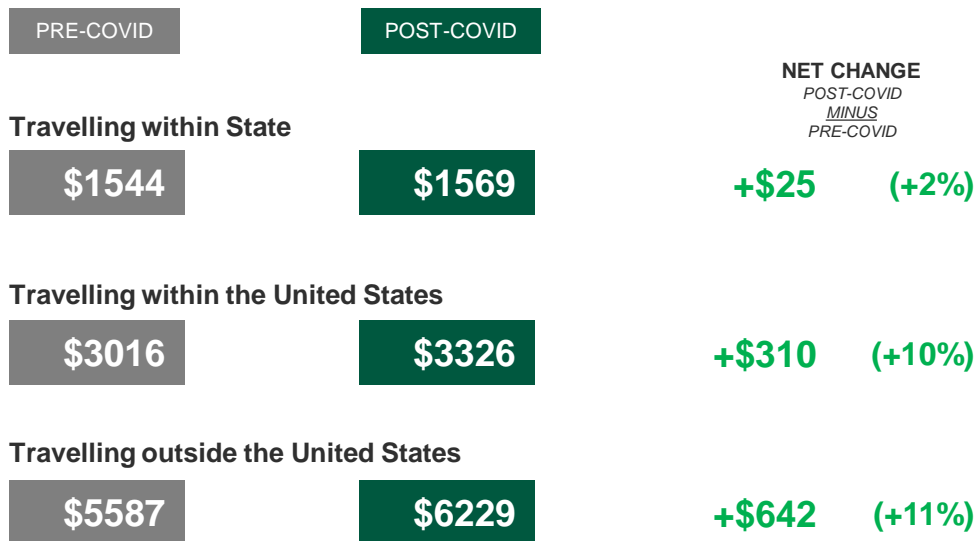
Base: Out-of-state pleasure travellers (past 3 years or next 2 years) (n=7805)

QS2. How would you describe your spending intentions on the following items in the next 12 months, compared to the last 12 months? Will you spend ...?

# Travel Spending<sup>+</sup>

- ▶ US travellers anticipate spending slightly more on travel post-COVID-19 than they did pre-COVID-19, regardless of the destination.
- ▶ Travelling outside the US is projected to see the greatest percentage growth in spending – the anticipated spending (\$6,229) is almost double that of spending on domestic out-of-state travel (\$3,326).

## Mean Annual Household Spend on Vacation Trips



\* New questions in 2021 GTW – no trending.

Base: Out-of-state pleasure travellers who traveled in 2019 (n=3847 Domestic / n=4052 Short-haul / n=2230 Long-haul)

TP2\_INT. Thinking about the vacation trips you took in 2019, approximately how much did your immediate household spend in total on trips to each destination? A rough estimate is fine but if you cannot remember please select don't know. (PRE-COVID)

Base: Out-of-state pleasure travellers who expect to travel post-COVID-19 (n=3848 Domestic / n=4048 Short-haul / n=2795 Long-haul)

TP2B\_INT. Thinking about the vacation trips you plan to take when COVID-19 is no longer a consideration, approximately how much does your immediate household intend to spend in total on trips to each destination? A rough estimate is fine but if it's too hard to predict please select don't know. (POST-COVID)

# Likelihood of Visiting Canada in Next 2 Years

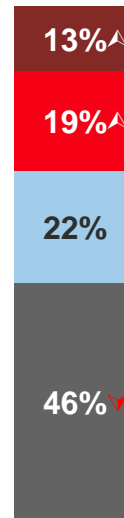
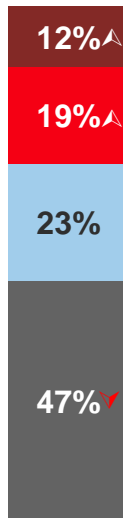
- ▶ Compared to 2020, the likelihood of visiting Canada in the next two years is up significantly. US travellers are more likely to be considering trips of both shorter and longer durations.
- ▶ Intent to visit Canada in the next two years is highest among those aged 18-54.

## Likelihood of Taking a Trip of:

### 1 to 3 nights

### 4+ nights

- Definitely
- Very likely
- Somewhat likely
- Not interested



**40%** ▲  
Likely  
(definitely/very  
likely) to visit  
Canada in next  
2 years

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

Note: Not interested is comprised of those saying not very likely, not at all likely, or indicating no intention to visit Canada.

Base: Out-of-state pleasure travellers (past 3 years or next 2 years) (n=7805)

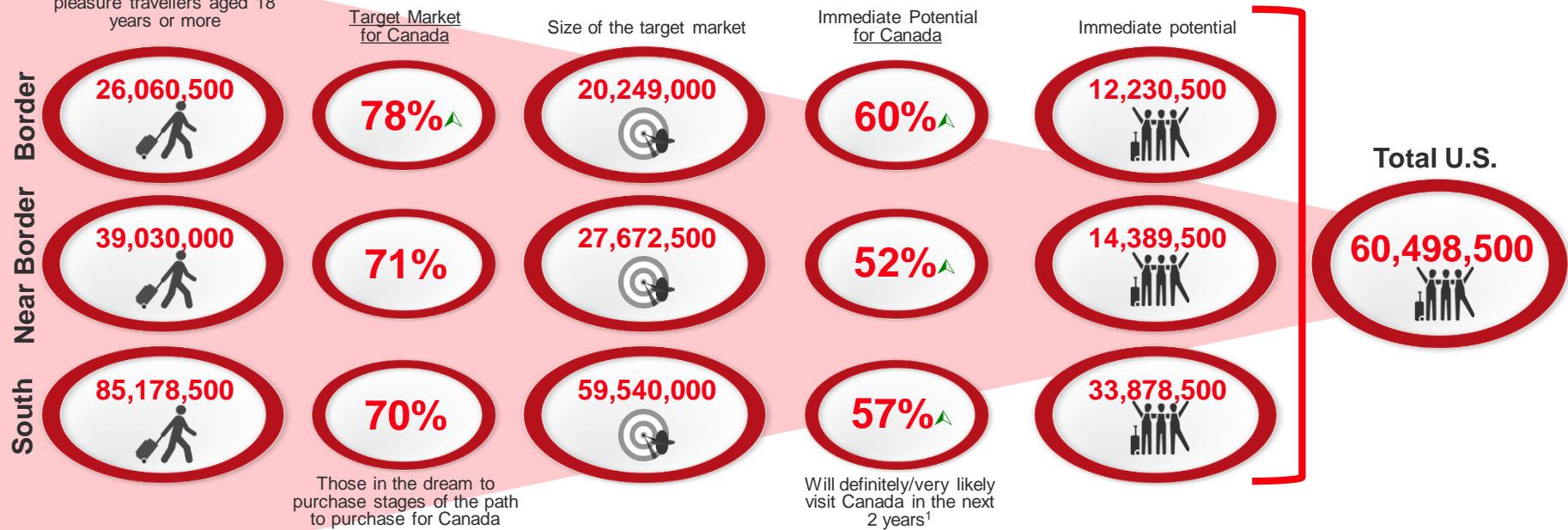
QMP6. Realistically, how likely are you to take a vacation trip to Canada in the next 2 years? (Select one)

# Potential Market Size For Canada

Study data is used to estimate the size of the potential market for Canada in two ways – the target market (proportion of all US travellers in the dream to purchase stages of the purchase cycle for Canada) and the immediate potential market (intention among the target market to visit in the next two years).

- ▶ The proportion of US travellers considering Canada is stable, but within that group the intention to visit in the next two years increased significantly, resulting in an immediate potential market size of 60.5 million.

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



<sup>1</sup> Includes respondents likely to visit Canada for a trip of 1 to 3 nights, or a trip of 4 nights or more.

Base: Target market for Canada = out-of-state pleasure travellers (past 3 years or next 2 years) (n=7805); Immediate potential for Canada = dream to purchase stages for P2P for Canada (n=5691)  
 QMP1. Which of the following best describes your current situation when thinking about each of the following destinations for a vacation trip?  
 QMP6. Realistically, how likely are you to take a vacation trip to Canada in the next 2 years?

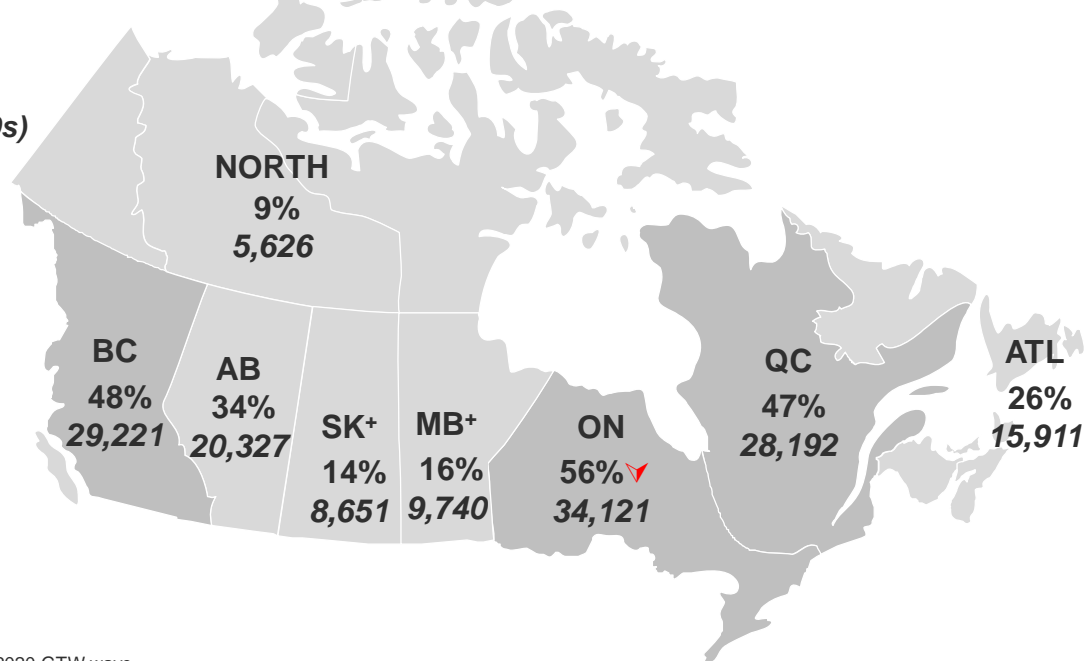
▲ / ▼ Significantly higher/lower than 2020 GTW wave.

# Potential Market Size for the Regions

- ▶ While interest in Ontario is down significantly since 2020, Ontario, BC, and Quebec continue to stand out as the provinces most likely to attract the largest share of US travellers.

Immediate Potential for Canada: **60,498,500**

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



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

\* Saskatchewan and Manitoba were combined in 2020 GTW wave – no trending.

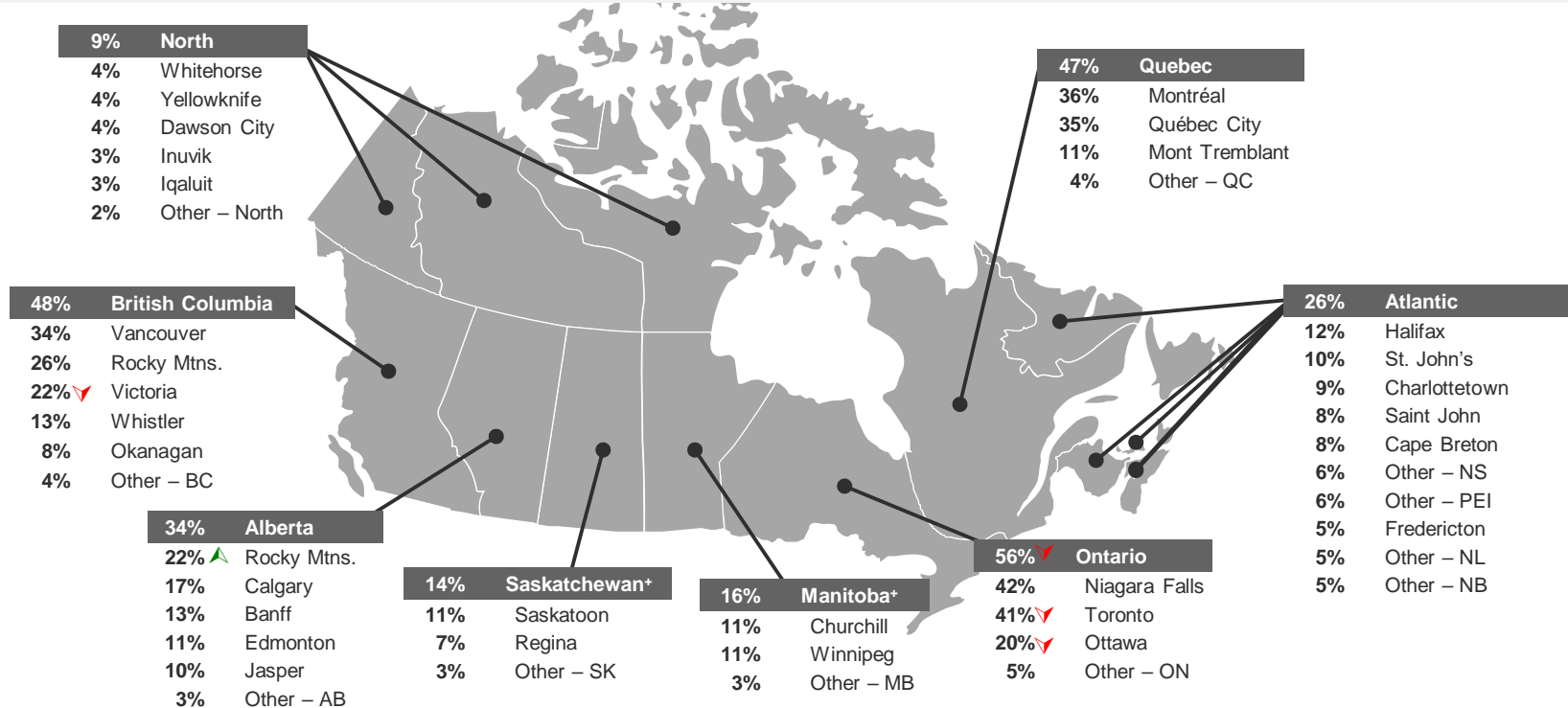
Base: Those in the dream to purchase stages of the path to purchase for Canada and definitely/very likely to take a trip to Canada (n=3227)

QMP7. If you were to take a vacation trip to Canada in the next 2 years, which of the following Canadian travel destinations are you likely to visit?



# Canadian Destinations Likely to Visit

- Declining interest in Ontario is driven by waning interest in Toronto and Ottawa. In other parts of Canada, interest in Alberta's Rocky Mountains has increased, while interest in visiting Victoria is down.



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

\* Saskatchewan and Manitoba were combined in 2020 GTW wave – no trending.

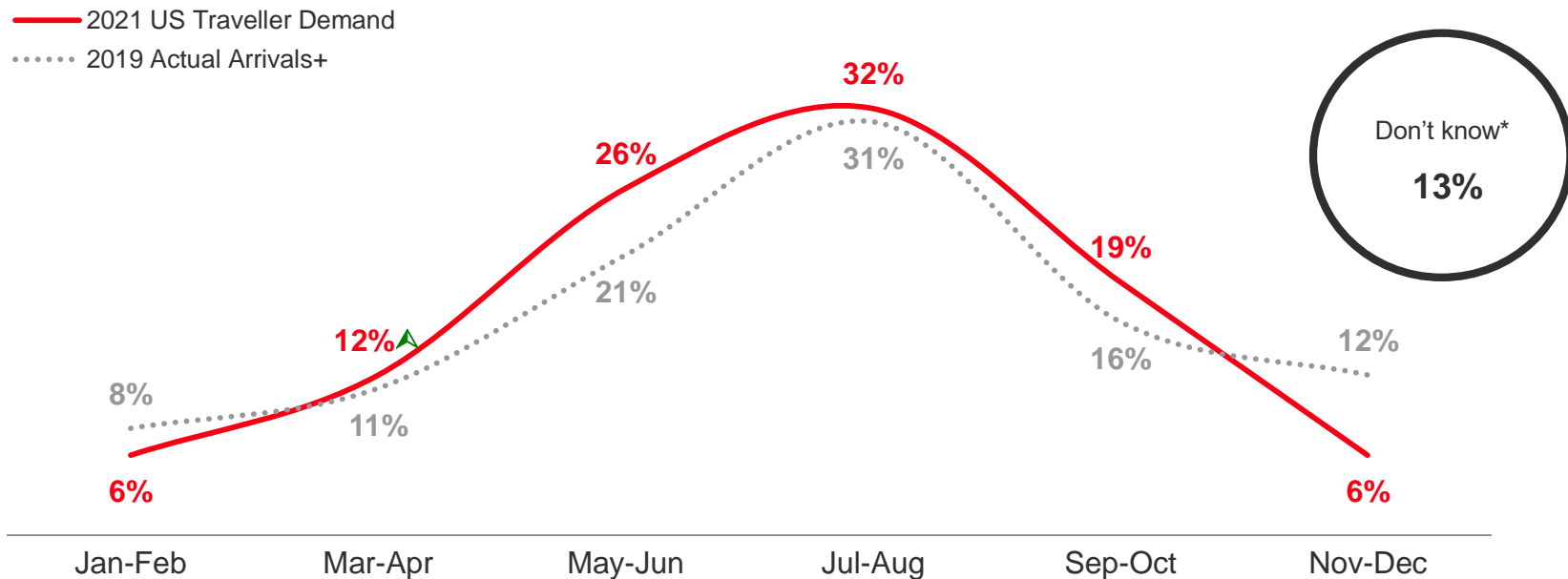
Base: Those in the dream to purchase stages of the path to purchase for Canada and definitely/very likely to take a trip to Canada (n=3227)

QMP7. If you were to take a vacation trip to Canada in the next 2 years, which of the following Canadian travel destinations are you likely to visit?

QMP7a-g. Within [province/region], which travel destinations are you likely to visit?

# US Seasonal Demand for Canada

- ▶ July and August are the most popular months for US travellers considering a visit to Canada, and also historically the peak months for visitor arrivals from the US.
- ▶ There is potential to disperse US visitation into late spring given that demand outpaces historical visitation during these months.



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

+ Source: 2019 Statistics Canada Frontier Border Counts.

\* 'Don't know' responses excluded from seasonal demand chart.

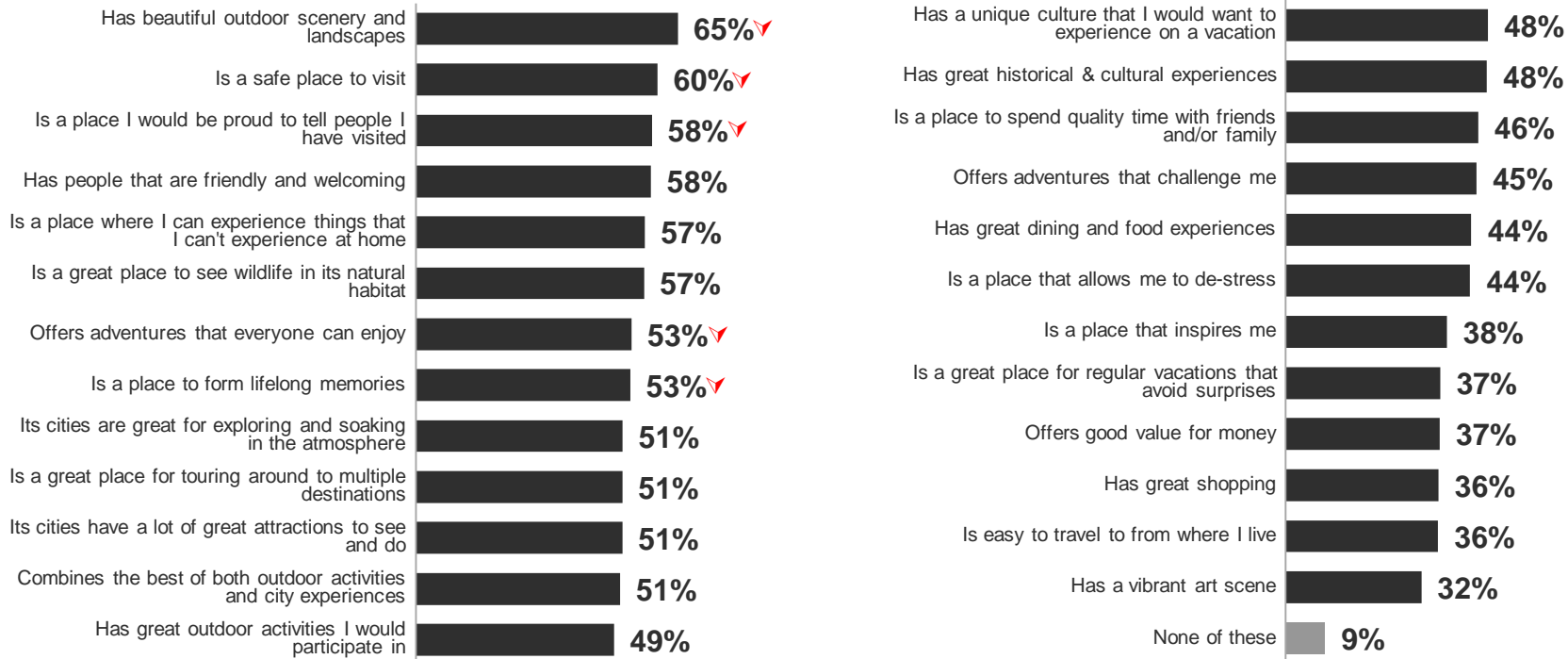
Base: Those in the dream to purchase stages of the path to purchase for Canada, excluding 'Don't know' (n=5035)

PC3. What time of year would you consider taking a vacation trip to Canada in the next 2 years? (Select all that apply)

# Impressions of Canada

# Impressions of Canada as a Vacation Destination

► Canada is best known among US travellers for beautiful scenery and landscapes, being a safe destination, and being a place US travellers would be proud to tell others they have visited. However, the proportion of US travellers associating Canada with these top attributes declined in 2021.



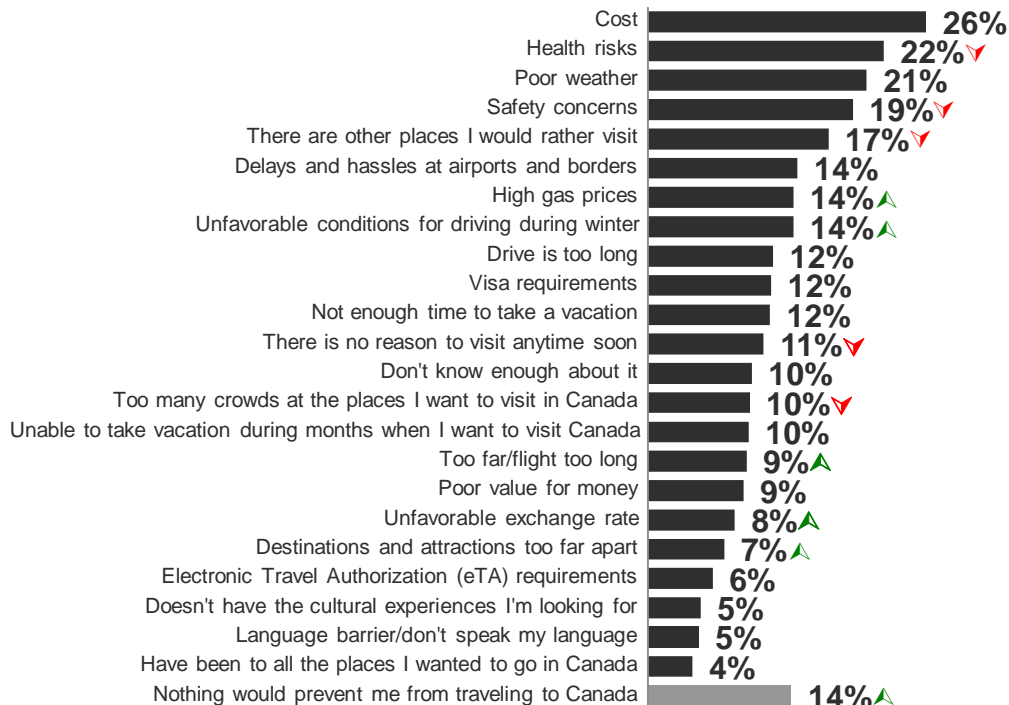
▲ / ▼ Significantly higher/lower than 2020 GTW wave.

Base: Out-of-state pleasure travellers (past 3 years or next 2 years) (n=7805)

QMP5\_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.

# Key Barriers for Visiting Canada

- As COVID-19 vaccines became more globally available in 2021, health concerns declined and cost concerns reemerged as the primary deterrent for potential US travellers to visit Canada. Safety concerns, a preference for other places, lack of urgency to visit, and concerns about crowds also declined in importance. Meanwhile, concerns about high gas prices, winter driving conditions, flight length, the exchange rate, and distance to travel between destinations increased.



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

Base: Out-of-state pleasure travellers (past 3 years or next 2 years) (n=7805)

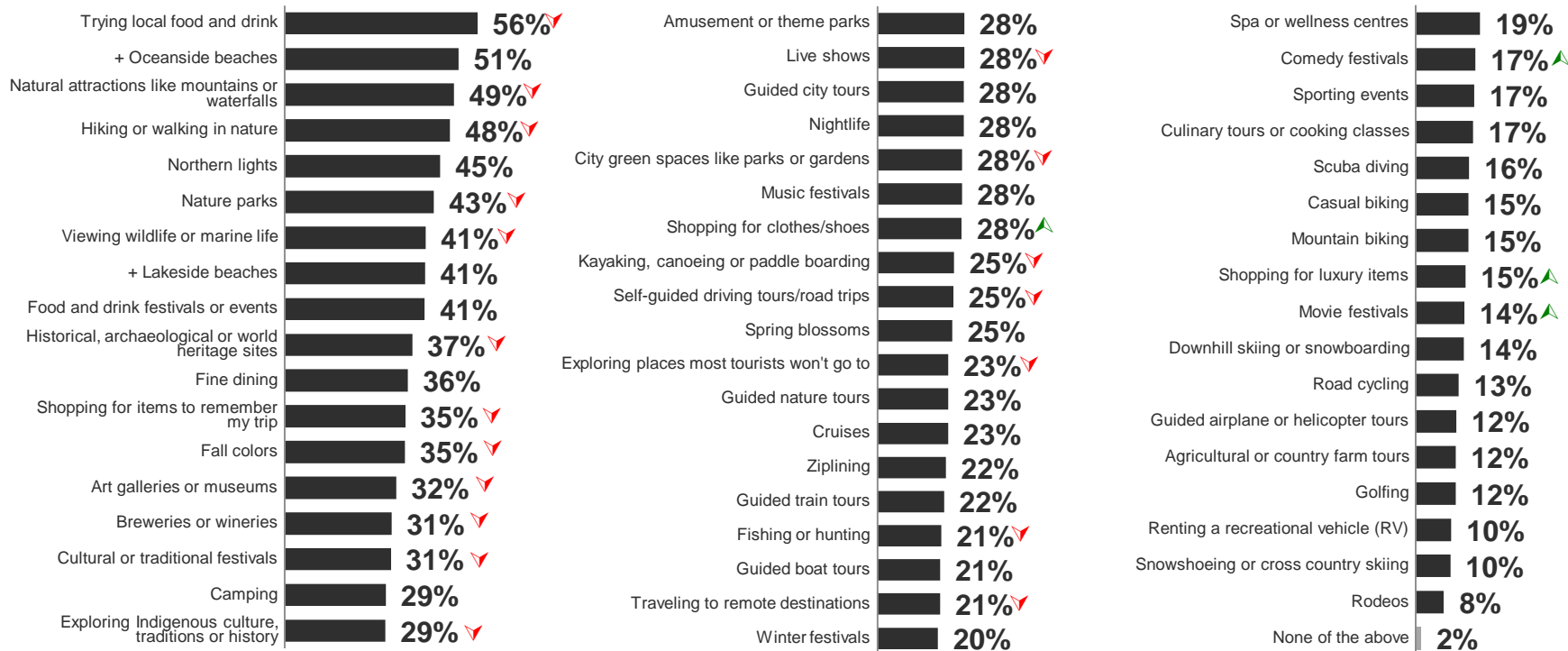
MP9. Which of the following factors might discourage you from visiting Canada? (Select all that apply)

# Vacation Interests



# Activities Interested in While on Vacation

- ▶ Along with trying local food and drink, US travellers have a strong preference for nature-based vacation activities.
- ▶ General interest in a wide variety of vacation activities, including both nature and city-based activities, decreased compared to 2020.



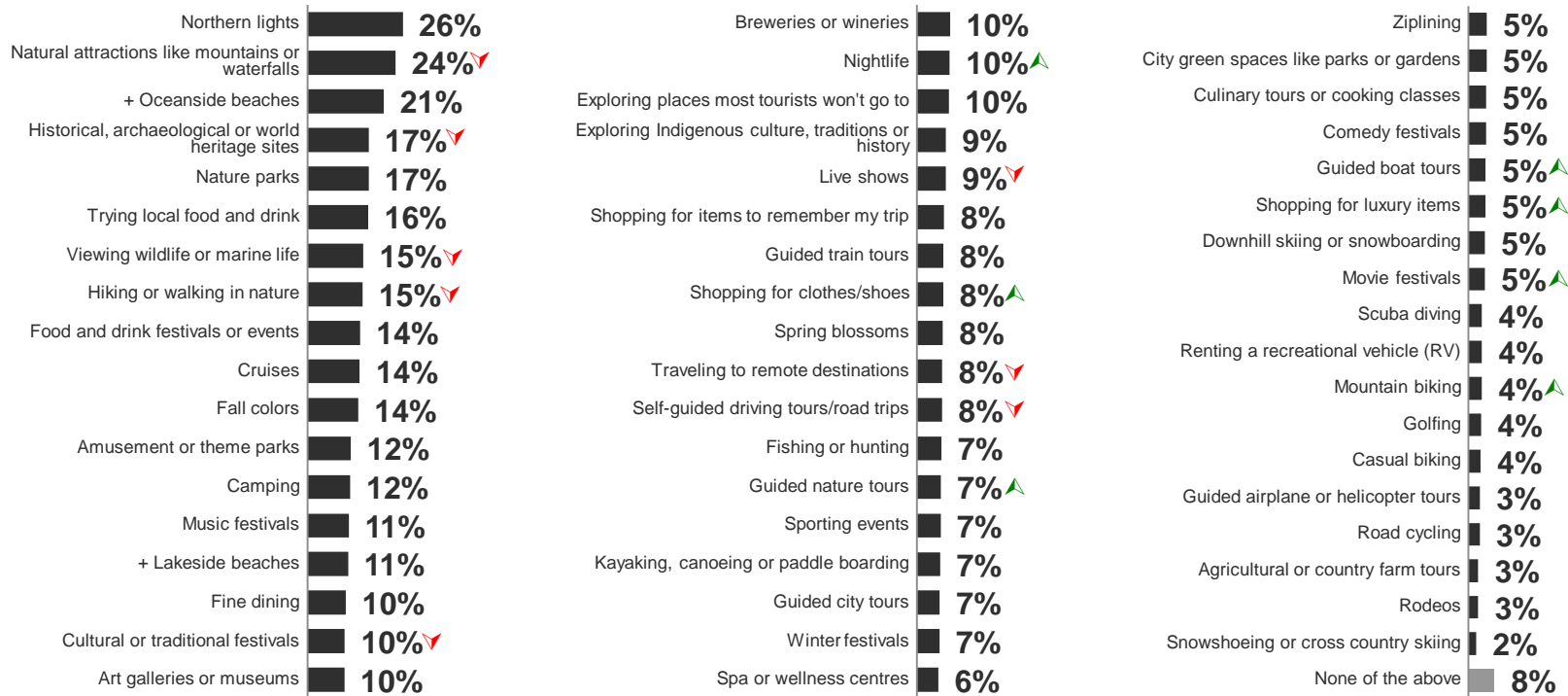
+ New statement in 2021 GTW – no trending.

Base: Out-of-state pleasure travellers (past 3 years or next 2 years) (n=7805)  
MP10. In general, what activities or places are you interested in while on vacation? (Select all that apply)

▲ ▼ Significantly higher/lower than 2020 GTW wave.

# Activities to Base an Entire Trip Around

- ▶ Seeing the Northern lights is the top activity US travellers would base a trip around, which presents a key opportunity for Canada. Natural attractions like mountains and waterfalls are also a strong trip anchor, although interest is down compared to 2020.



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

+ New statement in 2021 GTW – no trending.

Base: Out-of-state pleasure travellers (past 3 years or next 2 years) answering (n=7683)

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

# Time of Year Would Participate in Activities While on Vacation\*

- Spring and summer are the preferred seasons for US travellers to take part in several popular vacation activities, especially nature-based activities. Other popular activities such as food and drink festivals, breweries and wineries, and cultural festivals hold three season appeal. There are also several city-oriented activities which are popular year-round.

|   | Summer | Fall | Winter | Spring |
|---|--------|------|--------|--------|
| Trying local food and drink                         | 77%    | 64%  | 53%    | 75%    |
| + Oceanside beaches                                 | 89%    | 16%  | 10%    | 37%    |
| Natural attractions like mountains or waterfalls    | 63%    | 41%  | 15%    | 62%    |
| Hiking or walking in nature                         | 64%    | 54%  | 13%    | 72%    |
| Northern lights                                     | 34%    | 38%  | 60%    | 32%    |
| Nature parks  | 63%    | 47%  | 15%    | 67%    |
| Viewing wildlife or marine life                     | 70%    | 38%  | 19%    | 62%    |
| + Lakeside beaches                                  | 87%    | 18%  | 8%     | 42%    |
| Food and drink festivals or events                  | 70%    | 51%  | 31%    | 64%    |
| Historical, archaeological or world heritage sites  | 66%    | 49%  | 25%    | 66%    |
| Fine dining   | 70%    | 61%  | 55%    | 72%    |
| Shopping for items to remember my trip              | 72%    | 57%  | 48%    | 69%    |
| Fall colors   | -      | 100% | -      | -      |
| Art galleries or museums                            | 69%    | 63%  | 54%    | 72%    |
| Breweries or wineries                               | 71%    | 63%  | 43%    | 71%    |
| Cultural or traditional festivals                   | 65%    | 53%  | 30%    | 66%    |
| Camping   | 71%    | 38%  | 13%    | 54%    |
| Exploring Indigenous culture, traditions or history | 72%    | 59%  | 39%    | 73%    |

|  | Summer | Fall | Winter | Spring |
|--|--------|------|--------|--------|
| Amusement or theme parks                   | 73%    | 34%  | 16%    | 61%    |
| Live shows                                 | 70%    | 52%  | 39%    | 66%    |
| Guided city tours                          | 65%    | 53%  | 28%    | 72%    |
| Nightlife                                  | 75%    | 46%  | 40%    | 62%    |
| City green spaces like parks or gardens    | 72%    | 46%  | 15%    | 75%    |
| Music festivals                            | 73%    | 40%  | 24%    | 62%    |
| Shopping for clothes/shoes                 | 64%    | 49%  | 45%    | 64%    |
| Kayaking, canoeing or paddle boarding      | 84%    | 25%  | 8%     | 53%    |
| Self-guided driving tours/road trips       | 57%    | 48%  | 14%    | 62%    |
| Spring blossoms                            | -      | -    | -      | 100%   |
| Exploring places most tourists won't go to | 54%    | 41%  | 26%    | 56%    |
| Guided nature tours                        | 52%    | 45%  | 15%    | 66%    |
| Cruises                                    | 64%    | 27%  | 24%    | 48%    |
| Ziplining                                  | 76%    | 34%  | 11%    | 59%    |
| Guided train tours                         | 48%    | 54%  | 32%    | 62%    |
| Fishing or hunting                         | 62%    | 41%  | 22%    | 60%    |
| Guided boat tours                          | 69%    | 21%  | 13%    | 49%    |
| Traveling to remote destinations           | 65%    | 40%  | 22%    | 61%    |

|                                     | Summer | Fall | Winter | Spring |
|-------------------------------------|--------|------|--------|--------|
| Winter festivals                    | -      | -    | 100%   | -      |
| Spa or wellness centres             | 67%    | 54%  | 55%    | 69%    |
| Comedy festivals                    | 66%    | 47%  | 44%    | 67%    |
| Sporting events                     | 66%    | 48%  | 39%    | 58%    |
| Culinary tours or cooking classes   | 63%    | 54%  | 47%    | 69%    |
| Scuba diving                        | 80%    | 14%  | 12%    | 39%    |
| Casual biking                       | 62%    | 37%  | 11%    | 64%    |
| Mountain biking                     | 59%    | 31%  | 14%    | 58%    |
| Shopping for luxury items           | 64%    | 48%  | 48%    | 64%    |
| Movie festivals                     | 61%    | 45%  | 41%    | 60%    |
| Downhill skiing or snowboarding     | -      | -    | 100%   | -      |
| Road cycling                        | 59%    | 30%  | 14%    | 58%    |
| Guided airplane or helicopter tours | 59%    | 36%  | 22%    | 59%    |
| Agricultural or country farm tours  | 45%    | 39%  | 16%    | 57%    |
| Golfing                             | 66%    | 29%  | 15%    | 62%    |
| Renting a recreational vehicle (RV) | 61%    | 40%  | 23%    | 58%    |
| Snowshoeing or cross country skiing | -      | -    | 100%   | -      |
| Rodeos                              | 54%    | 34%  | 23%    | 49%    |

\* New question in 2021 GTW – no trending.

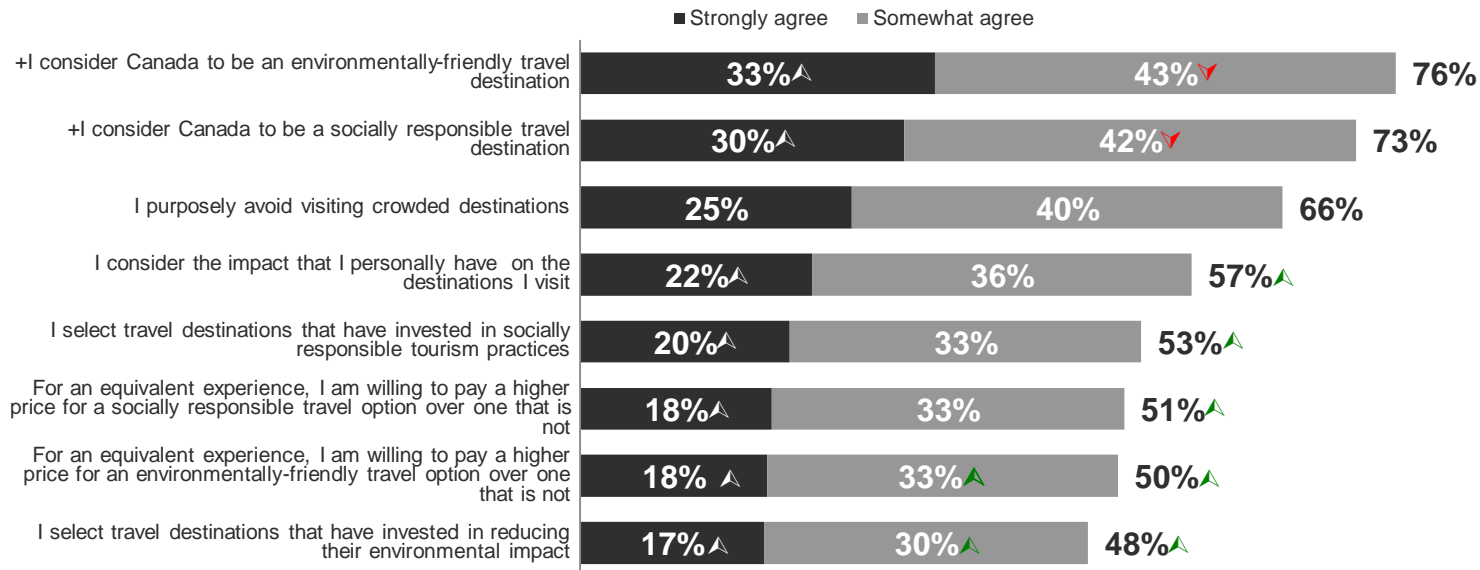
Base: Long-haul pleasure travellers (past 3 years or next 2 years) interested in activity MP10A. Thinking about activities or places you are interested in while on vacation, when would you typically take part in these activities? (Select all that apply) Note that the seasons refer to the destination's seasons.

 >50% of respondents who are interested in the activity would participate in this season

 40-49% of respondents who are interested in the activity would participate in this season

# Sustainable Travel

- ▶ Compared to 2020, significantly more US travellers say they are thinking about their personal impact on travel destinations. There has also been an increase in the proportion saying they select destinations that invest in socially and environmentally responsible practices, and would pay more accordingly.
- ▶ Approximately three-quarters of those interested in taking a trip to Canada consider it to be an environmentally-friendly and socially responsible travel destination.
- ▶ However, a much smaller number mention the availability of eco-friendly or socially responsible travel options as factors influencing their choice of Canada as a travel destination (both 16%).<sup>1</sup>



<sup>1</sup> Data can be found on page 32.

+ Base: Asked among those in the dream to purchase stages of the path to purchase for Canada (n=5691)

Base: Out-of-state pleasure travellers (past 3 years or next 2 years) (n=7805)

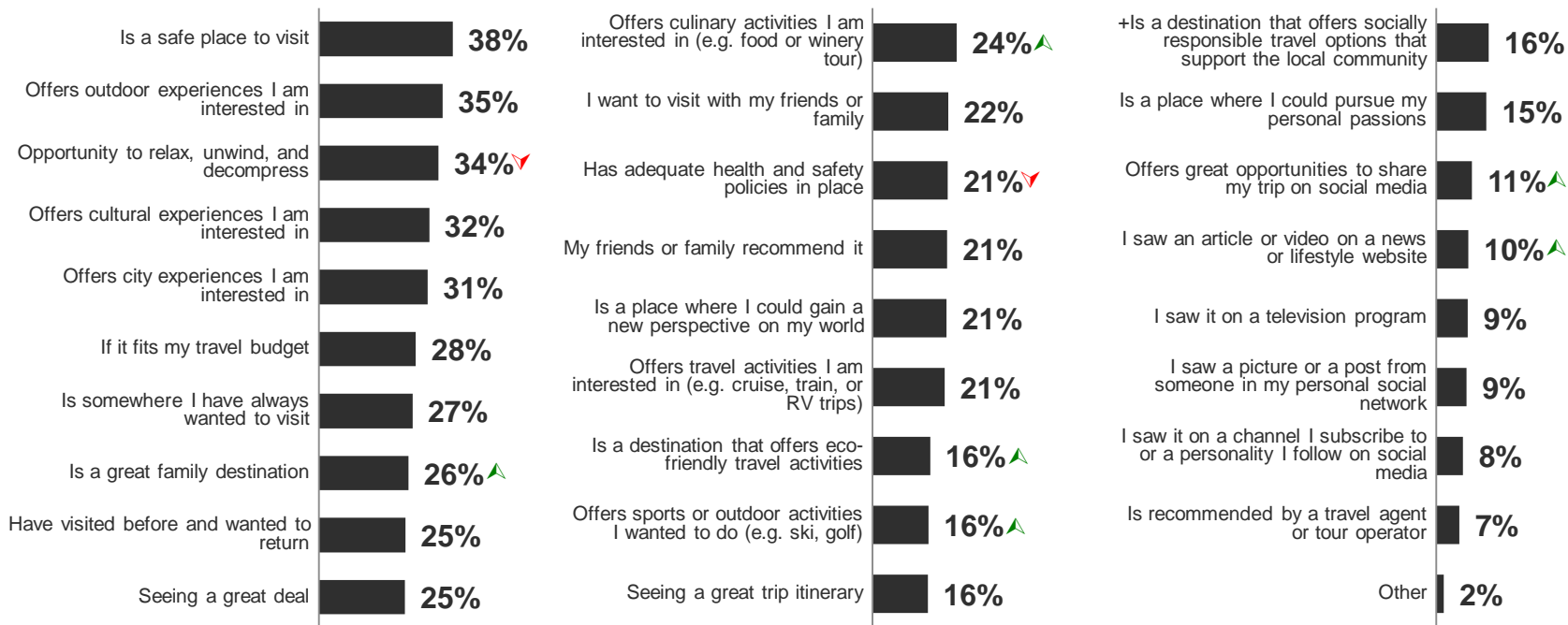
PC31. Sustainable travel refers to "travel that minimizes any negative impact on the destination's environment, economy and society, while making positive contributions to the local people and conserving the destination's natural and cultural heritage". Please indicate your level of agreement with each of the following statements ...

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

# Key Characteristics of Future Trips to Canada

# Factors Influencing Destination Choice

- ▶ Destination safety, the availability of interesting outdoor experiences, and the opportunity to relax are the top factors influencing US travellers to choose Canada as a vacation destination.
- ▶ Since 2020, the opportunity to relax has decreased in importance as a reason to choose Canada, while being a great family destination has increased in importance.



\* New statement in 2021 GTW – no trending.

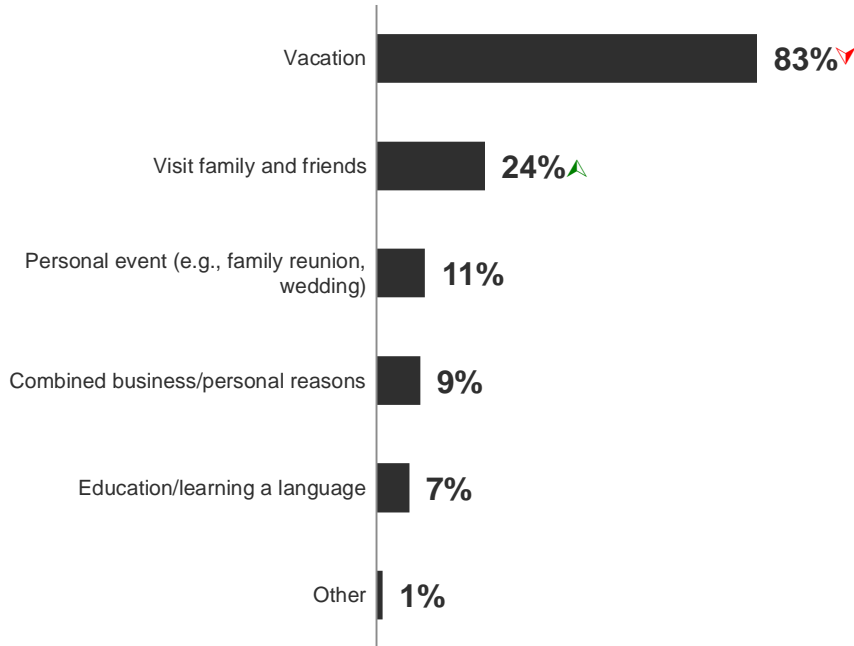
Base: Out-of-state pleasure travellers (past 3 years or next 2 years) considering Canada (n=1330)  
FT3. Which of the following would factor into your choice to travel? (Select all that apply)

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

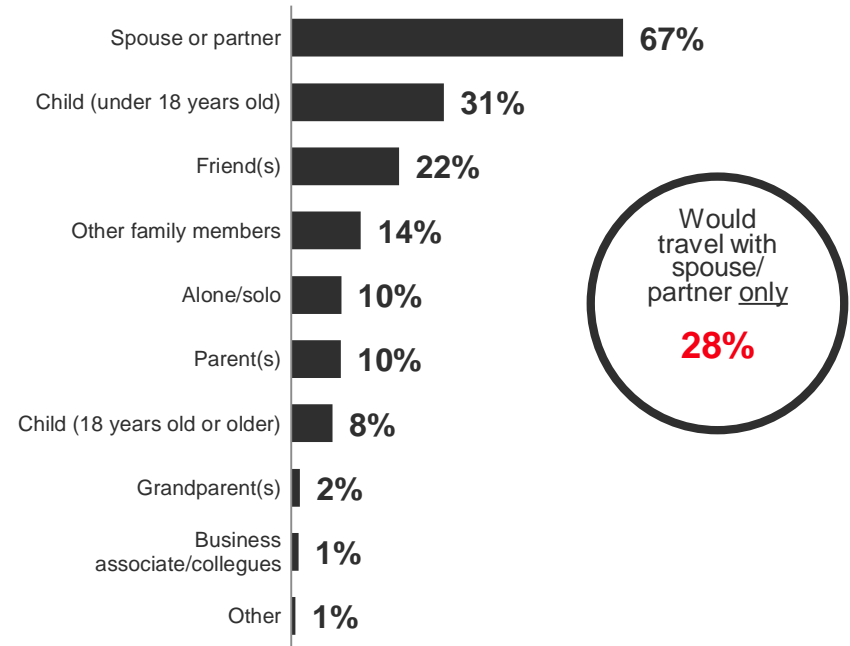
# Main Purpose and Travel Party of Future Trip

- ▶ Despite a decline in 2021, vacation trips will continue to predominantly drive US travel to Canada in the next 2 years, with VFR travel (trips to visit friends and relatives) playing an increasingly important role.
- ▶ US travel parties visiting Canada will be largely be made up of immediate family – primarily family trips with children or couples trips.

## Purpose of Trip



## Travel Party



Significantly higher/lower than 2020 GTW wave.

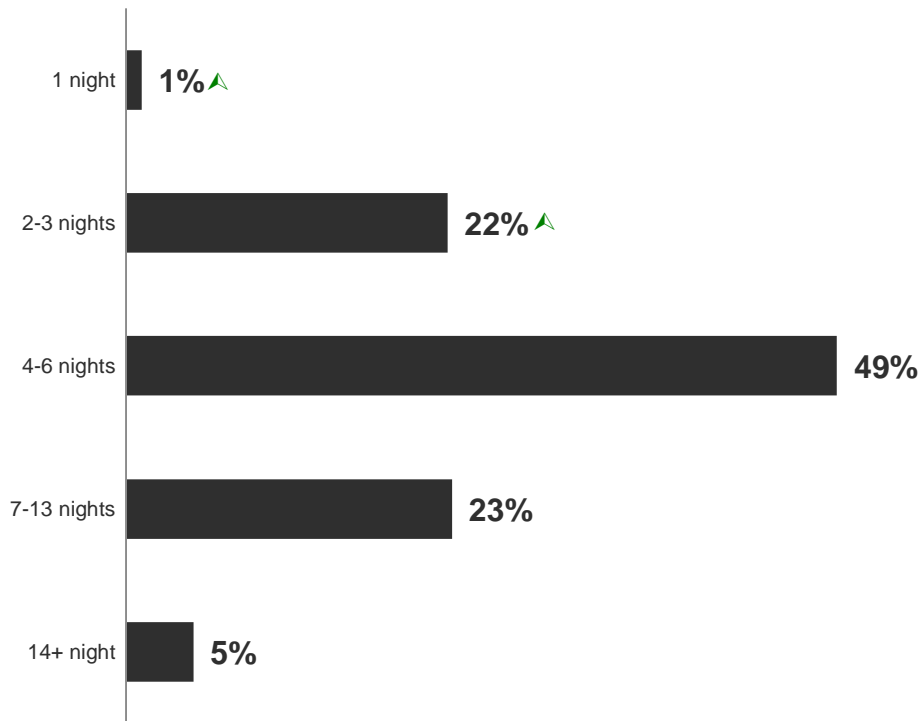
Base: Out-of-state pleasure travellers (past 3 years or next 2 years) considering Canada (n=1330) FT2. If you took a trip to Canada, what would be the main purpose of this trip?

Significantly higher/lower than 2020 GTW wave.

Base: Out-of-state pleasure travellers (past 3 years or next 2 years) considering Canada (n=1330) FT5. Who would you travel with on a trip to Canada? (Select all that apply)

# Length of Future Trip

- ▶ US travellers typically would like to spend at least four nights in Canada, with the highest preference for a trip of 4-6 nights. While a majority prefer longer trips, there has been a significant increase in US travellers planning trips to Canada of 2-3 nights in duration (most popular among those 18-34 years).



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

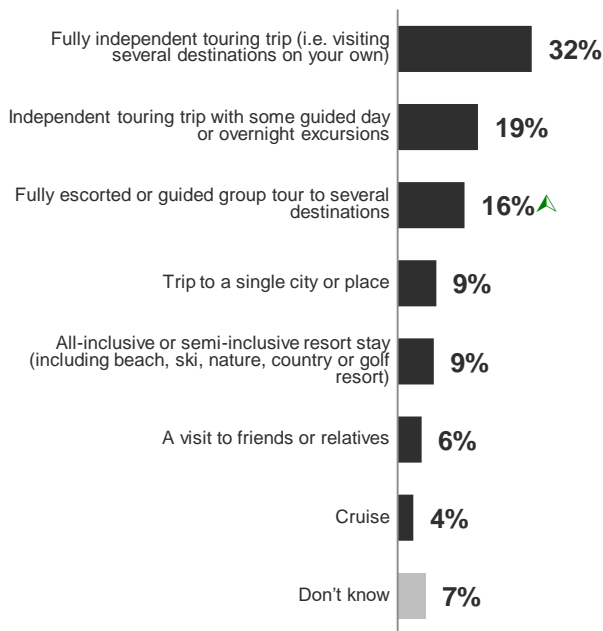
Base: Out-of-state pleasure travellers (past 3 years or next 2 years) considering Canada (n=1330)  
FT4. How many nights do you think you would spend on a trip to Canada?



# Trip Type and Accommodation for Future Trip

- ▶ Most US travellers would prefer to travel independently on a trip to Canada, although there is increased interest in fully escorted itineraries.
- ▶ Despite a decline compared to 2020, mid-priced hotels still stand out as the most preferred type of accommodation for a trip to Canada. Mentions of renting a house/apartment and resort accommodation have also declined in 2021.

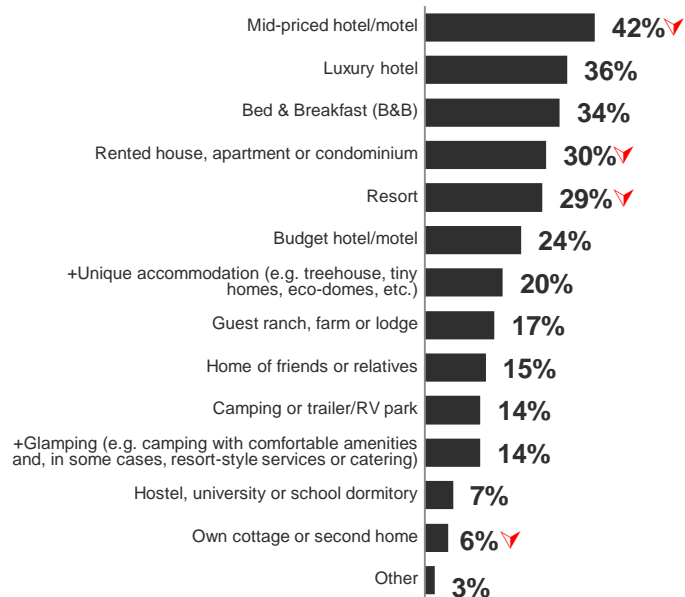
## Trip Type



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

Base: Out-of-state pleasure travellers (past 3 years or next 2 years) considering Canada (n=1330) FT9. What type of trip do you think you would be most likely to book for a trip to Canada? (Select one)

## Type of Accommodation



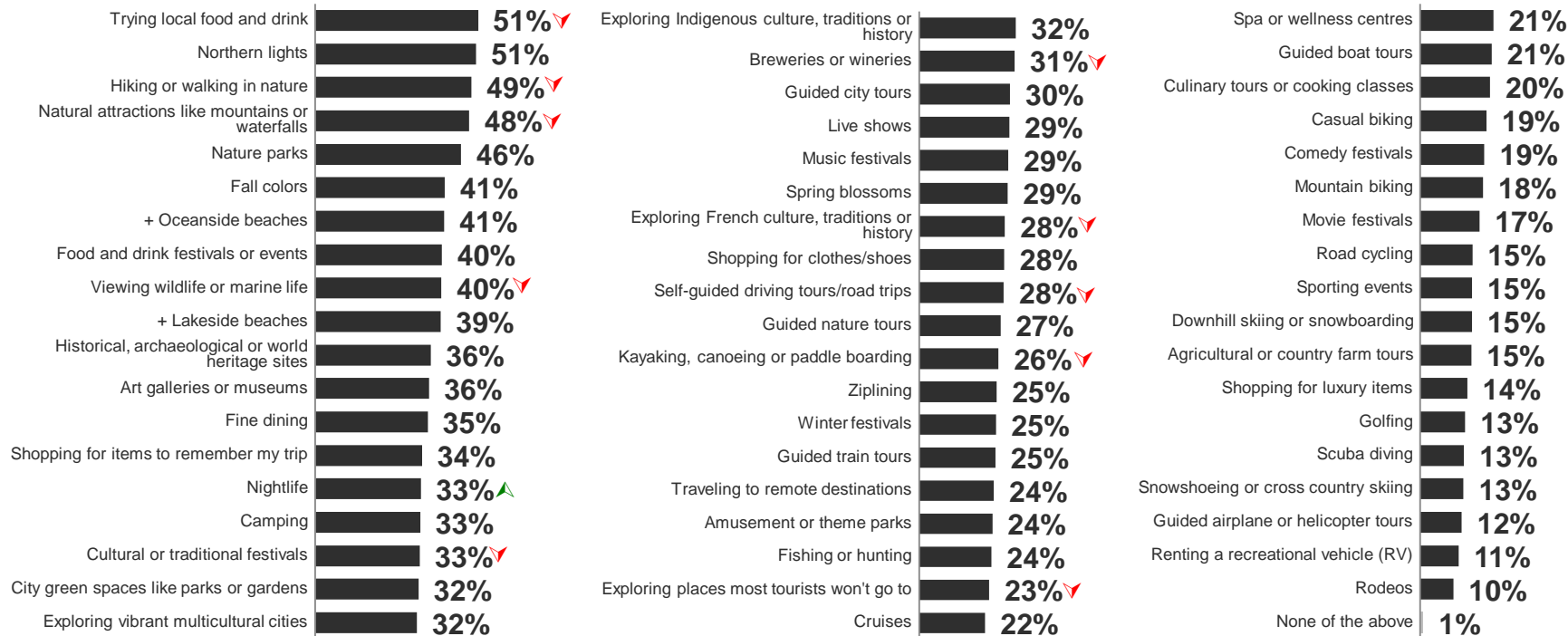
▲ / ▼ Significantly higher/lower than 2020 GTW wave.

+ New statement in 2021 GTW – no trending.

Base: Out-of-state pleasure travellers (past 3 years or next 2 years) considering Canada (n=1330) FT10. Which types of accommodation would you consider staying at during a trip to Canada? (Select all that apply)

# Activities Interested in on Future Trip to Canada

► For trips to Canada, interest has fallen relative to 2020 for several top activities including trying local food and drink, hiking or walking in nature, and natural attractions like mountains or waterfalls. The exception is interest in the Northern Lights, which is now tied for the #1 activity of interest on a trip to Canada.



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

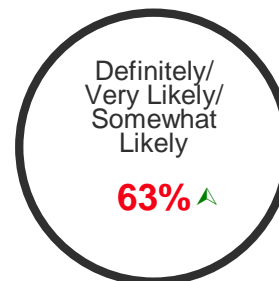
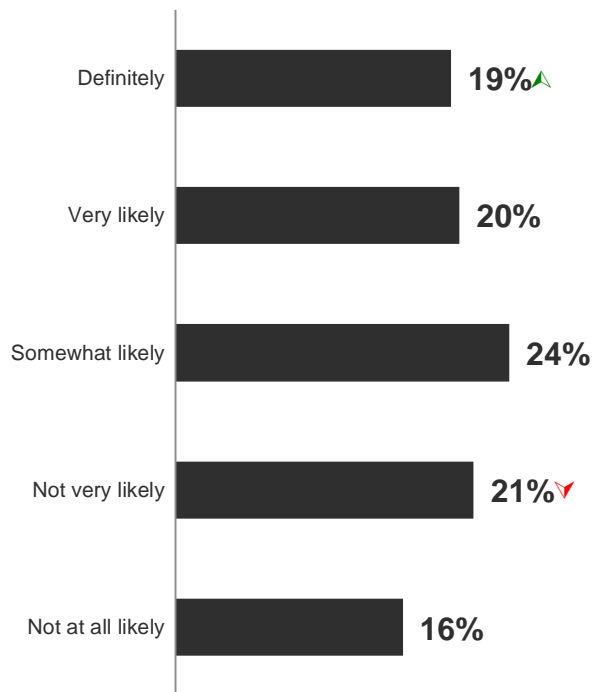
+ New statement in 2021 GTW – no trending.

Base: Out-of-state pleasure travellers (past 3 years or next 2 years) considering Canada (n=1330)

FT11. What activities would you be interested in participating in during a trip to Canada? (Select all that apply)

# Travel Agent Usage for Future

- ▶ Travel agents and tour operators play a substantial role in supporting travel from the US to Canada, with an increasing majority of potential US visitors indicating that they are likely to use a travel agent to research or book a trip to Canada.



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

Base: Out-of-state pleasure travellers (past 3 years or next 2 years) considering Canada (n=1330)

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 Collette Vacations or Liberty Travel, they do not include online booking engines like Expedia or Travelocity. How likely are you to use a travel agent or tour operator to help you research or book a trip to Canada?