

2021 Global Tourism Watch Highlights Report



Total Canada

Canada



Global Tourism Watch



 DESTINATION
CANADA

Study Overview: Canada Market



Total Canadian Residents: The Canada study was conducted among the general population in 2021 (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. Results from these respondents are labelled Out-of-Province.
- **In-Province:** Canadian residents aged 18 years and older, who evaluated destinations within their province of residence. Results from these respondents are labelled In-Province.



Timing of Fieldwork



2021

Where possible, the results are compared against the **most recent wave**, the COVID Tracker W4 (May 2021). However, if the question was not asked in the COVID Tracker W4, but was in the GTW 2020 wave, then results are compared against the GTW 2020 wave.



GTW Sample Distribution

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

Total Canadian Residents:	9,051
• Domestic Out-of-Province Travellers:	4,532
• In-Province:	4,519

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 Canada

In October 2021, all provinces had measures in place to combat the spread of COVID-19, such as vaccine passports, masking, and social distancing. With high vaccination rates, many provinces were releasing reopening plans and were expected to start relaxing some restrictions.¹ The fifth wave, fuelled by the Omicron variant, did not hit Canada until December 2021.²

Travel situation

On October 22, 2021, the Canadian government removed a travel advisory to avoid all non-essential travel outside of Canada.³ As of October 30, air, rail, and ship passengers, both domestic and international, required proof of being full vaccinated to board.⁴

With stable COVID-19 case counts in Canada, opportunities for Canadian travellers to visit international destinations were increasing. As of November 8, 2021, the US was open to fully vaccinated Canadian travellers without requiring a negative COVID-19 test to enter.⁵ Other destinations (e.g. Australia) remained closed to visitors. Upon returning to Canada, fully vaccinated Canadians no longer had to quarantine, but required a negative PCR test to enter the country.⁶

¹ CBC, October 2021.

² The Guardian, December 2021.

³ Forbes, October 2021.

⁴ Government of Canada, October 2021.

⁵ U.S. Customs and Border Protection.

⁶ NBC News, October 2021.

KEY HIGHLIGHTS

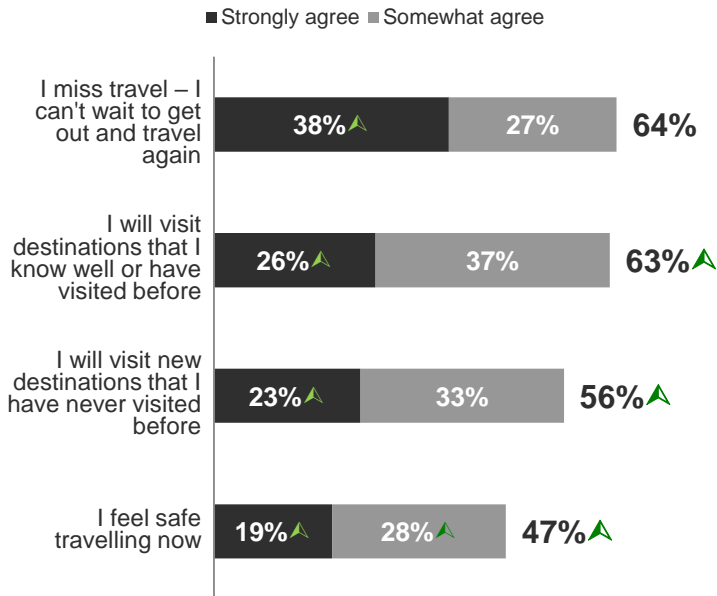
Insight	Implication
<p>Canadian residents are feeling more optimistic about travel relative to 2020. Significantly more Canadian residents say they feel safe travelling now, and the likelihood to use most forms of transportation has increased. There are also several signs that Canadian residents are eagerly anticipating a return to international travel.</p>	<p><i>There is an opportunity to capitalize on Canadian residents' renewed interest in travel. As COVID-19 restrictions ease, the competition from international destinations will intensify, making it imperative to find ways to keep Canadians interested in domestic travel.</i></p>
<p>Many COVID-19-related concerns have subsided, but health and safety measures and tourism facilities being open are still important considerations. Vaccine passport requirements are also an important consideration for Canadian residents.</p>	<p><i>To encourage domestic tourism, it is important for destinations to clearly communicate that tourism facilities are open and clarify any health and safety measures that may be in place.</i></p>
<p>Travel is the top spending priority for the next year. Canadian residents are planning to spend more on travel post-COVID-19 than they did pre-COVID-19. While anticipated spending on international travel is still higher than anticipated spending on domestic travel, spending on domestic out-of-province travel is projected to see the greatest percentage increase.</p>	<p><i>The current prioritization of spending on travel, along with the anticipated increased spend on domestic travel, presents a strong opportunity for Canada. However, as COVID-19 restrictions ease and the competition from international destinations grows, Canadian destinations may need to continue encouraging Canadians to travel domestically.</i></p>
<p>Despite prioritizing travel, there are signs that Canadian residents are increasingly cost conscious. Cost concerns are the top deterrent for domestic travel, with concerns about high gas prices and value for money rising. In addition, more Canadian residents say they are choosing destinations because they meet their travel budget.</p>	<p><i>Canadian residents are becoming more cost conscious and domestic destinations must find ways to convince prospective visitors that a vacation within Canada offers good value for money. Travel incentives and deals may also help to encourage Canadians to travel domestically.</i></p>
<p>Canadian residents still have a strong affinity for nature-based vacation activities. While interest in some top outdoor activities like hiking have declined, interest in other popular activities like Fall colours have increased.</p>	<p><i>Highlighting the vast array of activities available on a trip within Canada, including opportunities for many different outdoor activities, may help to encourage domestic travel.</i></p>
<p>Prospects for domestic city travel are encouraging, with three quarters of Canadian residents open to visiting a major Canadian city in the next year. Those who remain hesitant are mainly concerned about crowds and the perceived expense.</p>	<p><i>There is a large potential domestic traveller market for major Canadian cities. Highlighting less crowded activity options may entice more hesitant Canadian residents to visit a Canadian city.</i></p>
<p>Domestic trips are getting shorter. Canadian residents are shifting away from planning longer trips of four or more nights, moving towards shorter domestic trips of three nights or less.</p>	<p><i>Since longer trips yield higher overall spend, promoting longer stays or broader multi-day itineraries can help encourage Canadians to extend their trips.</i></p>

COVID-19 Considerations

Attitudes Toward Travel and Transportation Modes

- ▶ Significantly more Canadian residents say they feel safe travelling now (47%, up from 25% in May 2021). However, older travellers (55+ years) remain more cautious. As comfort levels increase, Canadian residents are more enthused about travel generally, with a slight preference for visiting familiar destinations over new ones.
- ▶ As COVID-19 restrictions ease, Canadian residents are also growing more comfortable with using most forms of transportation, including flying internationally (36%, up from 33% in May 2021) and domestically (35%, up from 30% in May 2021). The exception is cruises, which only 13% of Canadian residents feel comfortable taking (down from 16% in May 2021).

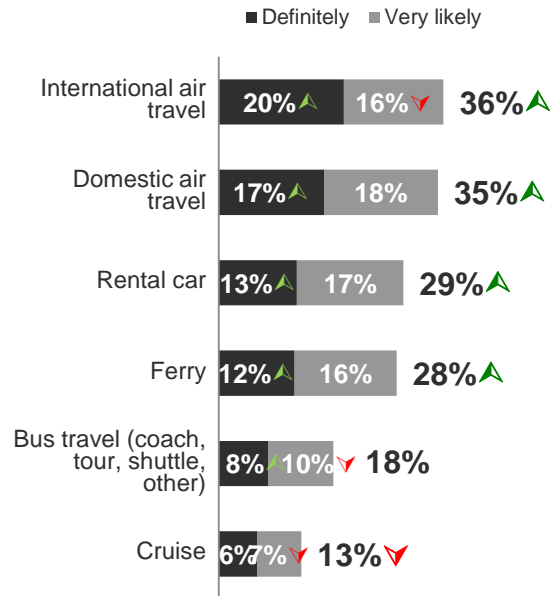
Attitudes Toward Travel



▲ / ▼ Significantly higher / lower than COVID Tracker W4.

Base: Canadian residents (n=9051)
COV13. Thinking of your next vacation, as government restrictions allow, how much do you agree or disagree with the following statements?

Transportation Modes



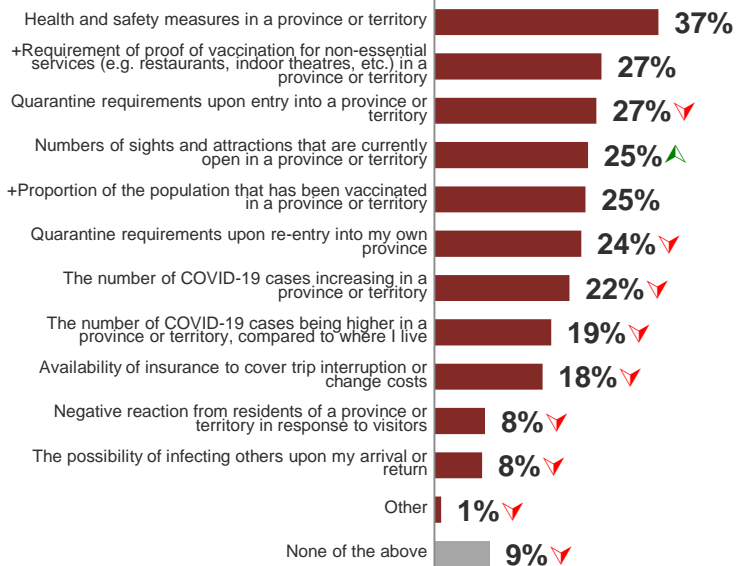
▲ / ▼ Significantly higher / lower than COVID Tracker W4.

Base: Canadian residents (n=9051)
COV16. As government restrictions allow, how likely are you to use the following modes of transportation?

Most Important Considerations in Selecting Travel Destination

- ▶ When selecting a destination, concerns related to health and safety measures in a destination are top of mind for Canadian residents, regardless of destination, although this concern is easing for in-province travel.
- ▶ Proof of vaccination/vaccine passports are an important consideration for Canadian residents regardless of destination.
- ▶ The number of tourism facilities that are open is a growing consideration for destination selection.

Out-of-Province



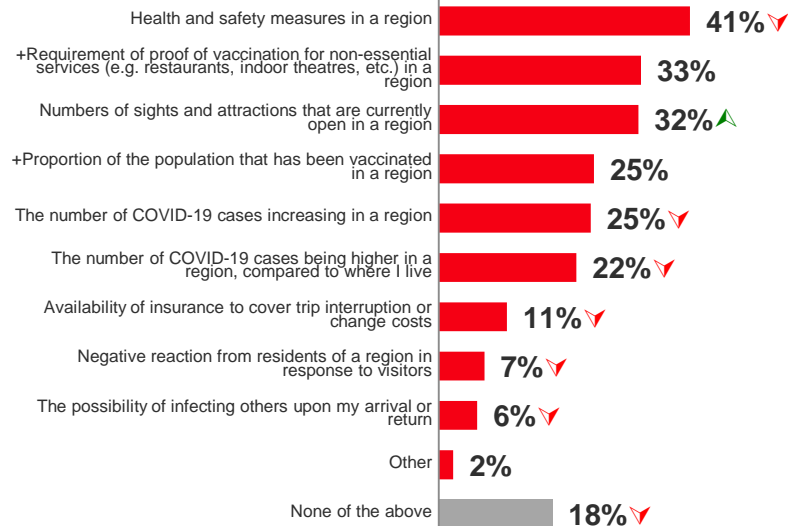
+ New statement in 2021 GTW – no trending.

Base: Domestic out-of-province travellers (n=4532)

Base: Canadian residents evaluating in-province destinations (n=4519)

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)

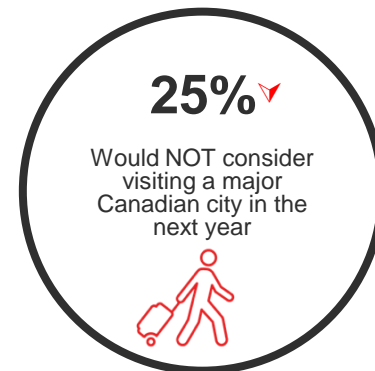
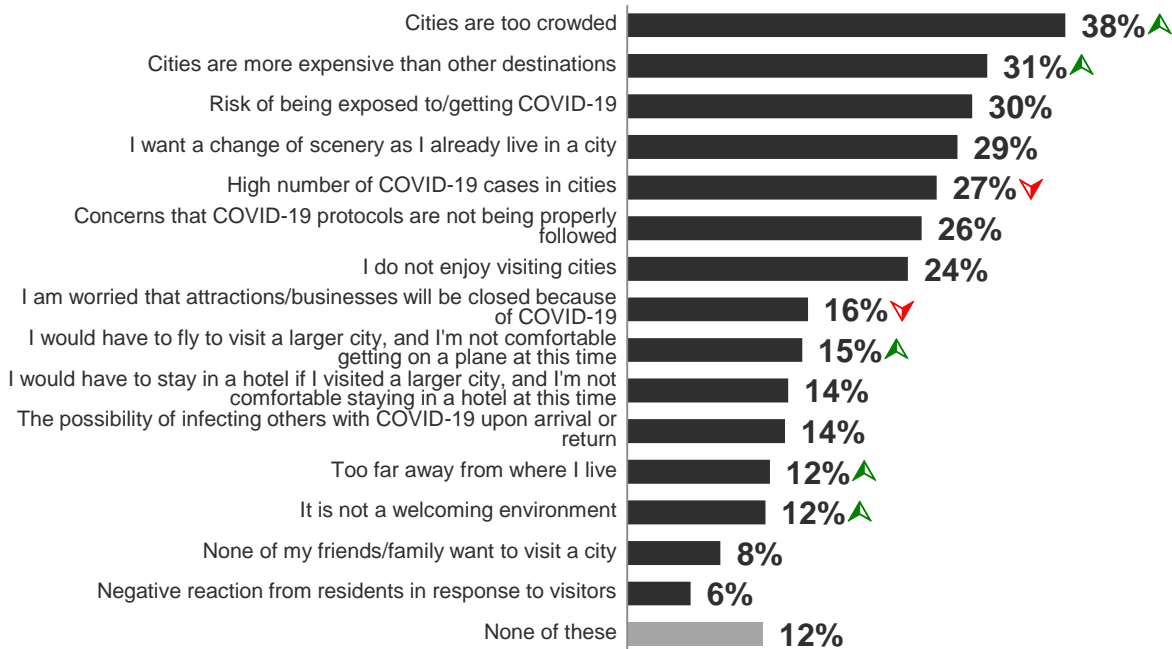
In-Province



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

Reasons for Not Visiting Larger Canadian Cities

- ▶ Concerns about visiting cities are subsiding, with only 25% of Canadian residents saying they would *not* consider a city trip in the next year, down from 28% in May 2021.
- ▶ Those concerned about visiting cities continue to be most apprehensive about crowding, with the expense of city travel emerging as a growing concern. Meanwhile, some concerns related to COVID-19 are beginning to wane.



▲ / ▼ Significantly higher / lower than COVID Tracker W4.

Base: Total Canadians who would not consider visiting Vancouver, Edmonton, Calgary, Victoria, Toronto, Ottawa, Montréal, Québec City, Winnipeg, Regina, Saskatoon or Halifax in the next year (n=2245)

CITY1. The destinations you indicated you are interested in visiting in the next year do not include any of Canada's largest cities. Which of the following are reasons why you would not consider visiting a larger Canadian city in the next year? (Select all that apply)

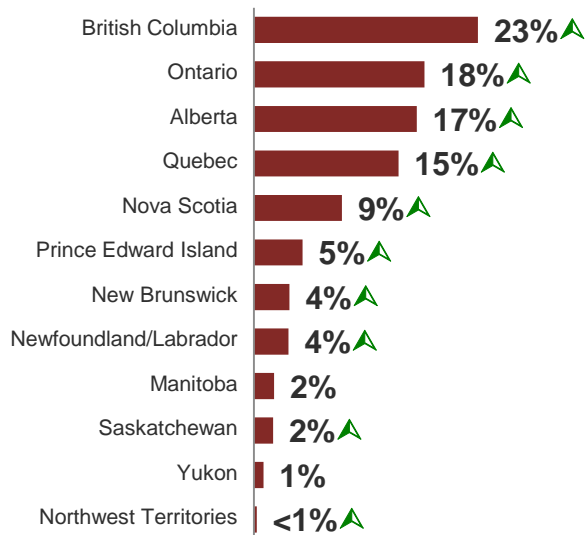
Key Performance Indicators

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

Unaided consideration represents the top-of-mind presence of destinations in the consumer mindset and requires travellers to think of destinations without being prompted. **Aided consideration** represents the proportion of Canadian residents who say they would seriously consider visiting a destination, when prompted with a list of potential destinations.

- ▶ Most provinces saw stronger performance on unaided consideration for out-of-province travel relative to 2020.
- ▶ British Columbia and Ontario are the top provinces being considered for an out-of-province trip in the next year, on both unaided and aided consideration.

UNAIDED Consideration



▲ / ▼ Significantly higher / lower than 2020 GTW.

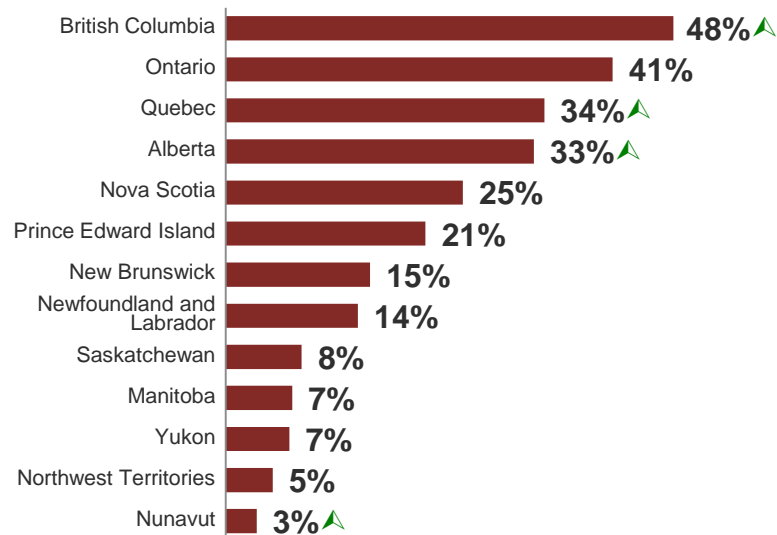
Base: Domestic out-of-province travellers (n=4532)

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?

10 Note: Unaided responses not coded in COVID Tracker W4, so results are compared against 2020 GTW.

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.

AIDED Consideration



▲ / ▼ Significantly higher / lower than COVID Tracker W4.

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

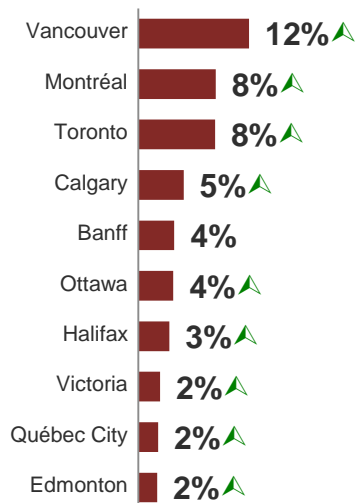
BVC1a. You may have already mentioned this before, but which destinations would you seriously consider visiting in the next year?

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

Unaided consideration represents the top-of-mind presence of destinations in the consumer mindset and requires travellers to think of destinations without being prompted. **Aided consideration** represents the proportion of Canadian residents who say they would seriously consider visiting a destination, when prompted with a list of potential destinations.

- ▶ Most Canadian cities saw higher unaided consideration results in 2021, as more Canadian residents indicated they are intending to travel compared to a year ago.
- ▶ Among out-of-province travellers, Vancouver remains the top ranked Canadian city on unaided and aided consideration.

UNAIDED Consideration



5%
Don't know

40%
Not planning to travel

▲ / ▼ Significantly higher / lower than 2020 GTW.

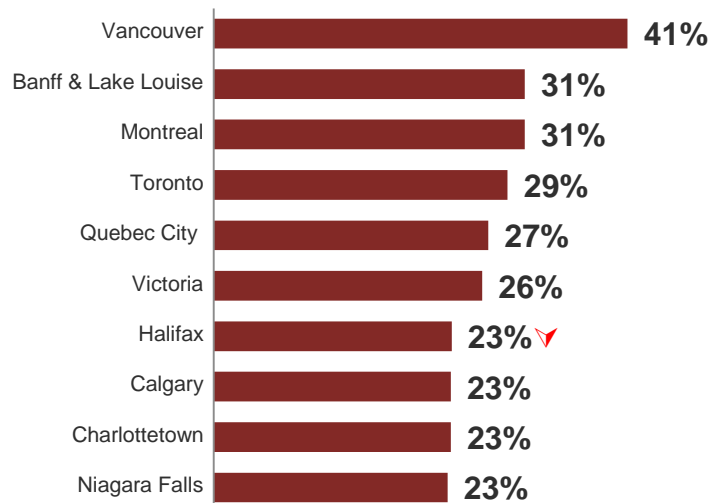
Base: Domestic out-of-province travellers (n=4532)

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?

11 Note: Unaided responses not coded in COVID Tracker W4, so results are compared against 2020 GTW.

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.

AIDED Consideration



▲ / ▼ Significantly higher / lower than COVID Tracker W4.

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

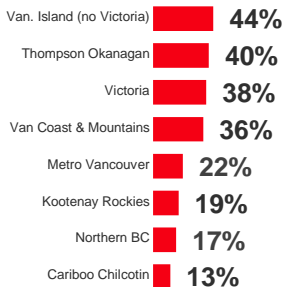
BVC1b. You may have already mentioned this before, but which destinations would you seriously consider visiting in the next year?

Aided Consideration (Next Year) – City/Region

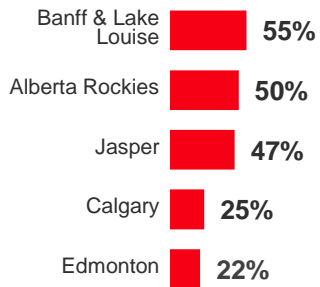
Aided consideration represents the proportion of Canadian residents who say they would seriously consider visiting a destination, when prompted with a list of potential destinations.

▶ There are few shifts in aided consideration of in-province travel destinations compared to May 2021, with the exception of Quebec, where many destinations saw higher consideration in October 2021.

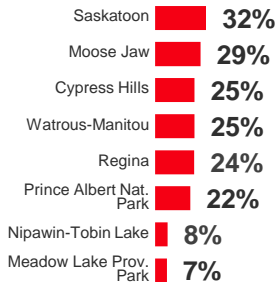
British Columbia (n=750)



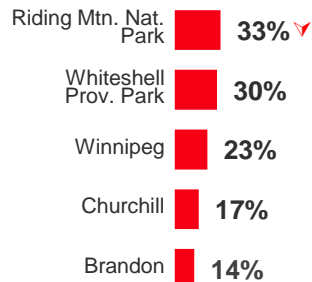
Alberta (n=750)



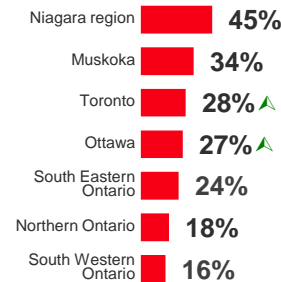
Saskatchewan (n=250)



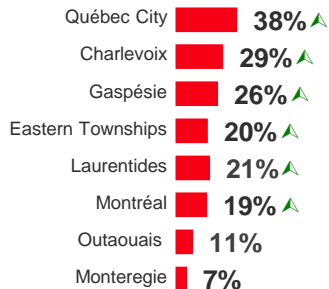
Manitoba (n=250)



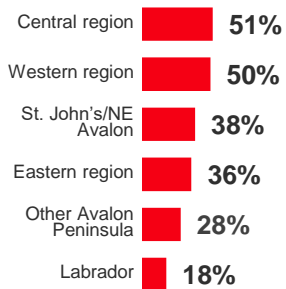
Ontario (n=1050)



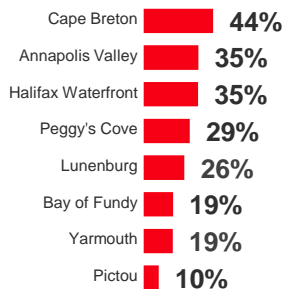
Quebec (n=750)



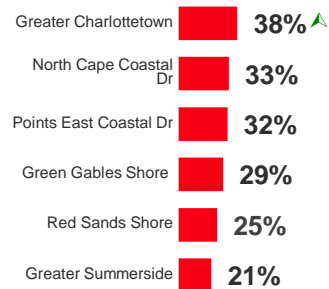
Newfoundland & Labrador (n=209)



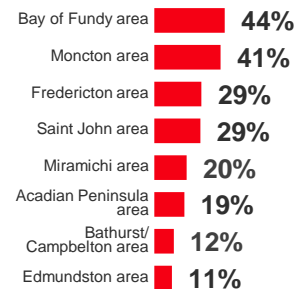
Nova Scotia (n=226)



Prince Edward Island (n=84)



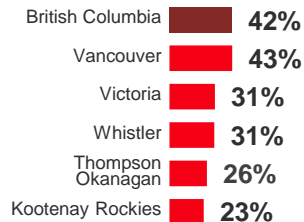
New Brunswick (n=200)



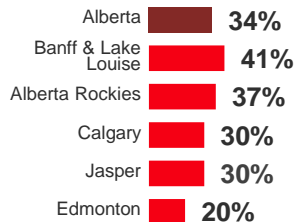
Knowledge of Vacation Opportunities – Province/City/Region

► Among out-of-province travellers, destination knowledge is highest for British Columbia, Ontario, Alberta, and Quebec.

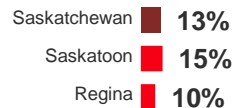
British Columbia



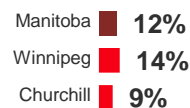
Alberta



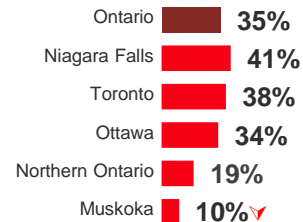
Saskatchewan



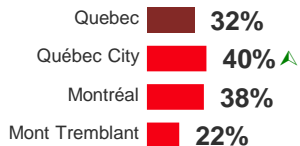
Manitoba



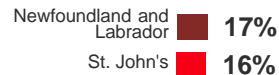
Ontario



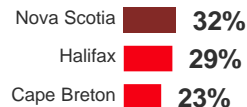
Quebec



Newfoundland & Labrador



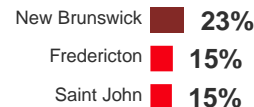
Nova Scotia



Prince Edward Island



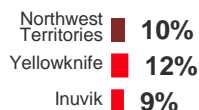
New Brunswick



Yukon



Northwest Territories



Nunavut

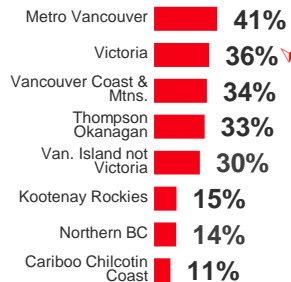


▲ / ▼ Significantly higher / lower than 2020 GTW.

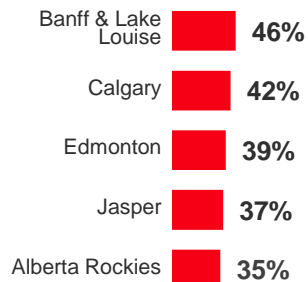
Knowledge of Vacation Opportunities – City/Region

► Among Canadian residents, destination knowledge of in-province destinations remains largely unchanged from 2020.

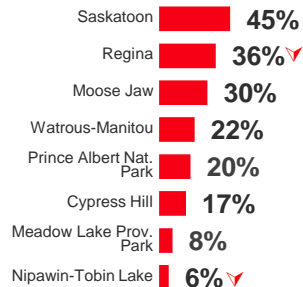
British Columbia



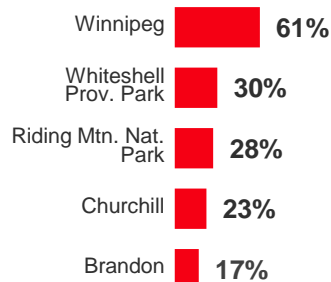
Alberta



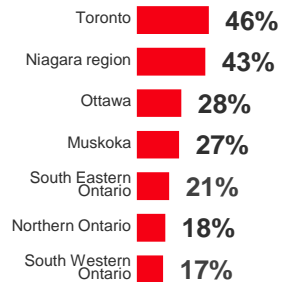
Saskatchewan



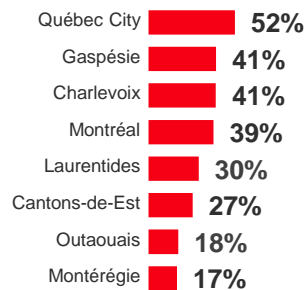
Manitoba



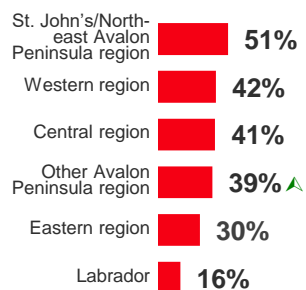
Ontario



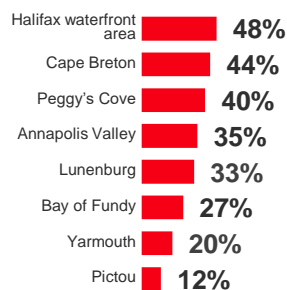
Quebec



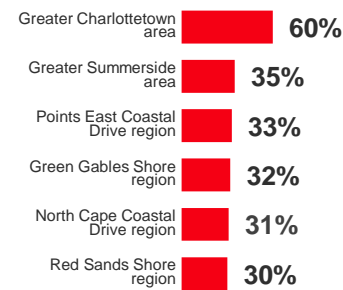
Newfoundland & Labrador



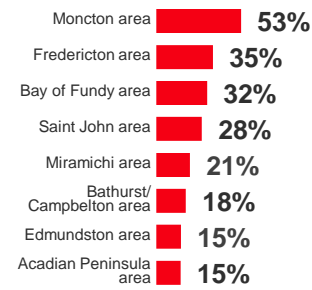
Nova Scotia



Prince Edward Island



New Brunswick



▲ / ▼ Significantly higher / lower than 2020 GTW.

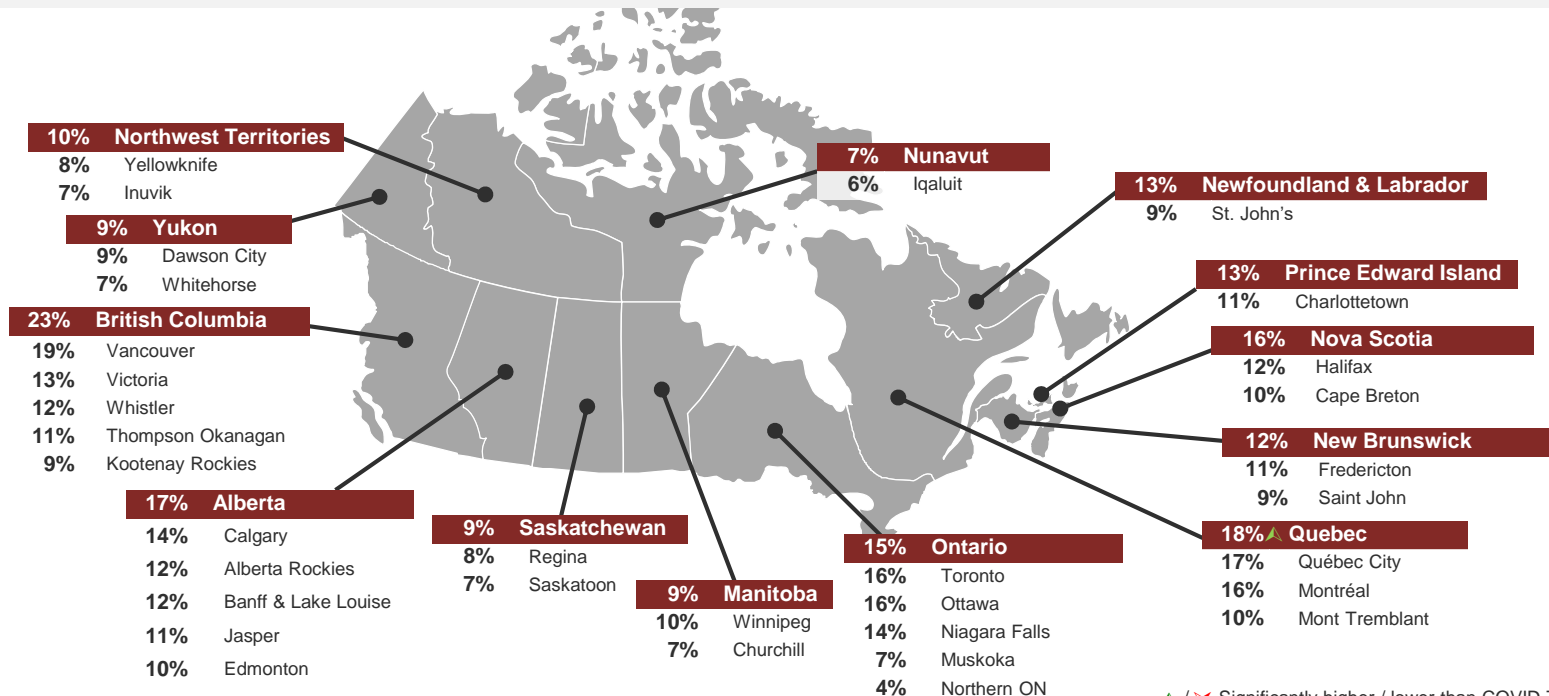
Base: Canadian residents evaluating in-province destinations (n=varies)

MP3_IP How would you rate your level of knowledge of vacation opportunities in each of the following destinations?

Net Active Planning – Province/City/Region

There is a purchasing or decision-making cycle associated with 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.

- ▶ Out-of-province travellers are most likely to be in the active planning stages for a trip to British Columbia, followed closely by Quebec, Alberta, Nova Scotia and Ontario. At the city level, Vancouver, Québec City, Montréal, Toronto, and Ottawa are at the top of the list.
- ▶ The proportion of out-of-province travellers who are actively planning a trip to Quebec has increased compared to May 2021.



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

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

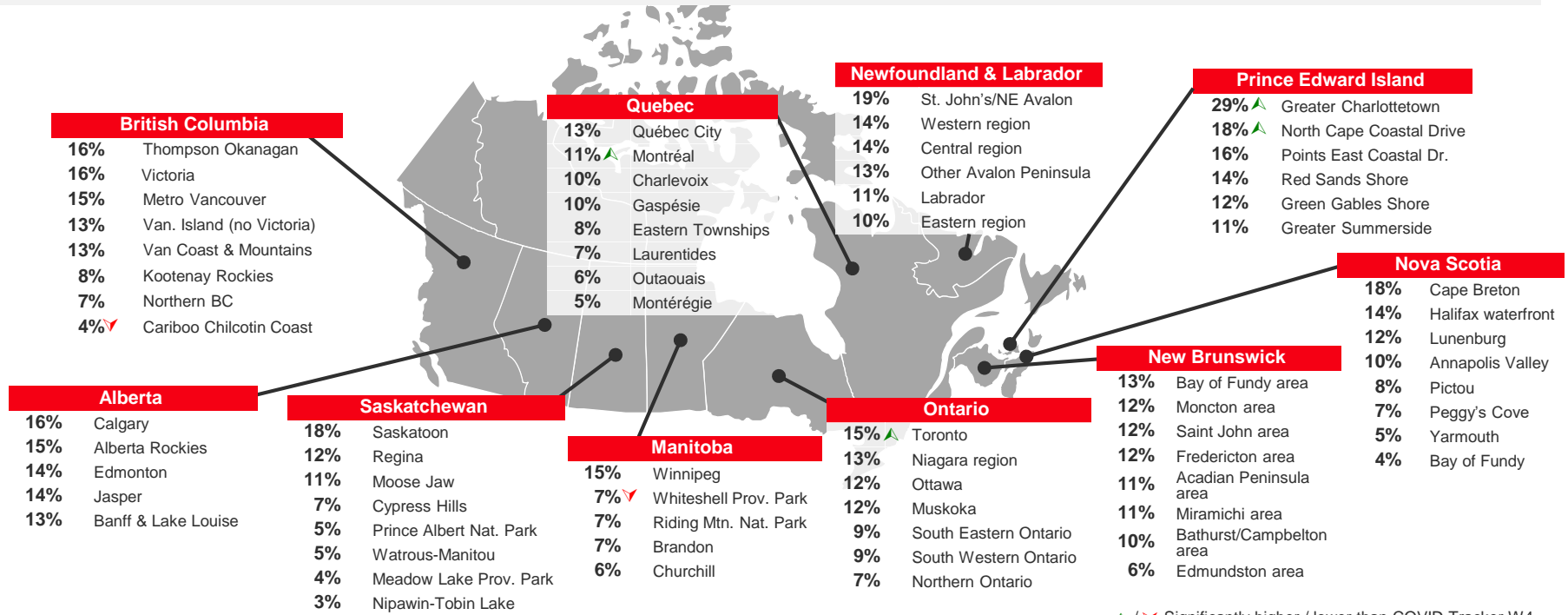
MP1. Which of the following best describes your current situation when thinking about each of the following destinations for a vacation trip?

▲ / ▼ Significantly higher / lower than COVID Tracker W4.

Net Active Planning – City/Region

There is a purchasing or decision-making cycle associated with 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.

▶ Canadian residents are generally more likely to be actively planning a trip to a major city in their province of residence than to other in-province destinations. The exceptions are British Columbia, New Brunswick, and Nova Scotia, where residents are most likely to be actively planning a trip to the Thompson Okanagan region, Bay of Fundy area, and Cape Breton.



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

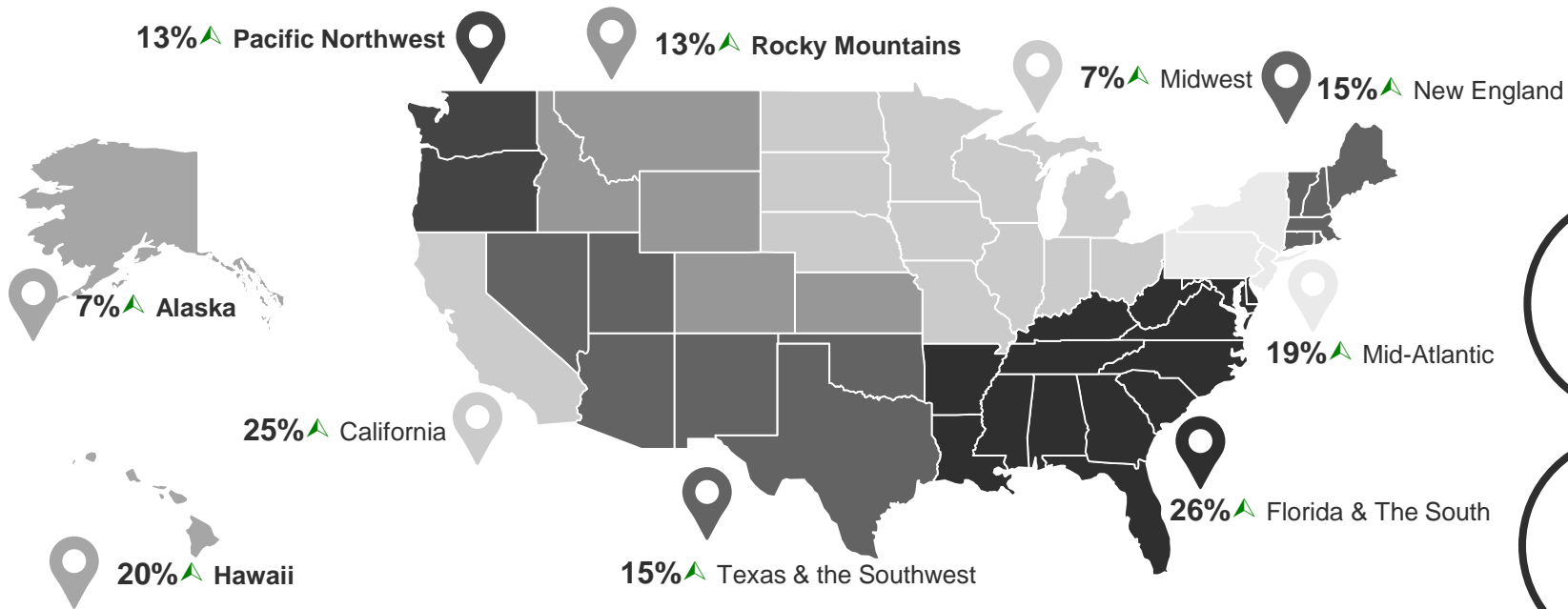
Base: Canada residents evaluating in-province destinations (n=varies) MP1_IP. Which of the following best describes your current situation when thinking about each of the following destinations for a vacation trip?

▲ / ▽ Significantly higher / lower than COVID Tracker W4.



U.S. Destination Consideration

- ▶ As COVID-19 restrictions ease, more Canadian residents are considering a trip to the US in the next year (68% of out-of-province travellers, up from 49% in 2020).
- ▶ With increased interest in visiting the US in general, all US states and regions recorded higher consideration levels in 2021. In particular, Canadian out-of-province travellers are most likely to be considering visiting Florida & The South, California, and Hawaii in the next year.



▲ / ▼ Significantly higher / lower than 2020 GTW.

Base: Domestic out-of-province travellers (n=4532)
MP2. Which regions of the U.S. would you consider visiting in the next year?

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 a destination are more likely to encourage others to visit. Results are gathered among out-of-province travellers who have ever visited the destination and data has been normalized to indicate relative NPS scores across all provinces.

► Newfoundland & Labrador is the top ranked province followed by British Columbia.

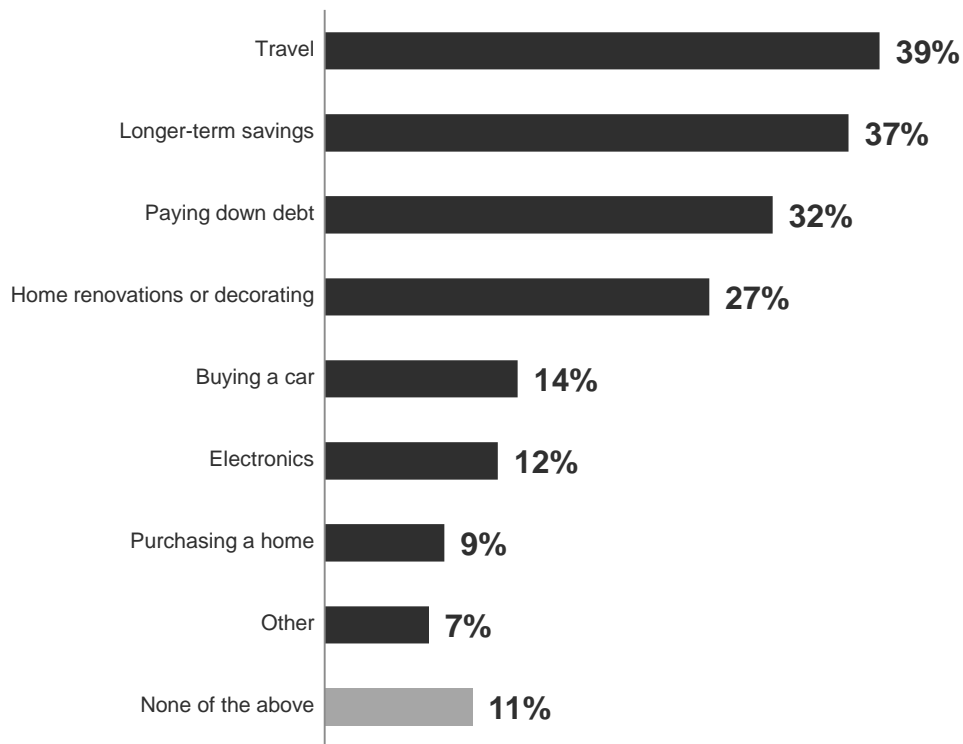
Normalized Data



Travel Spending and Canada Travel Intent

Spending Priorities for the Next Year⁺

► Travel is the top immediate spending priority for Canadians in 2021, though it is only marginally ahead of other priorities such as savings and debt repayment.



⁺ New question in 2021 GTW – no trending.

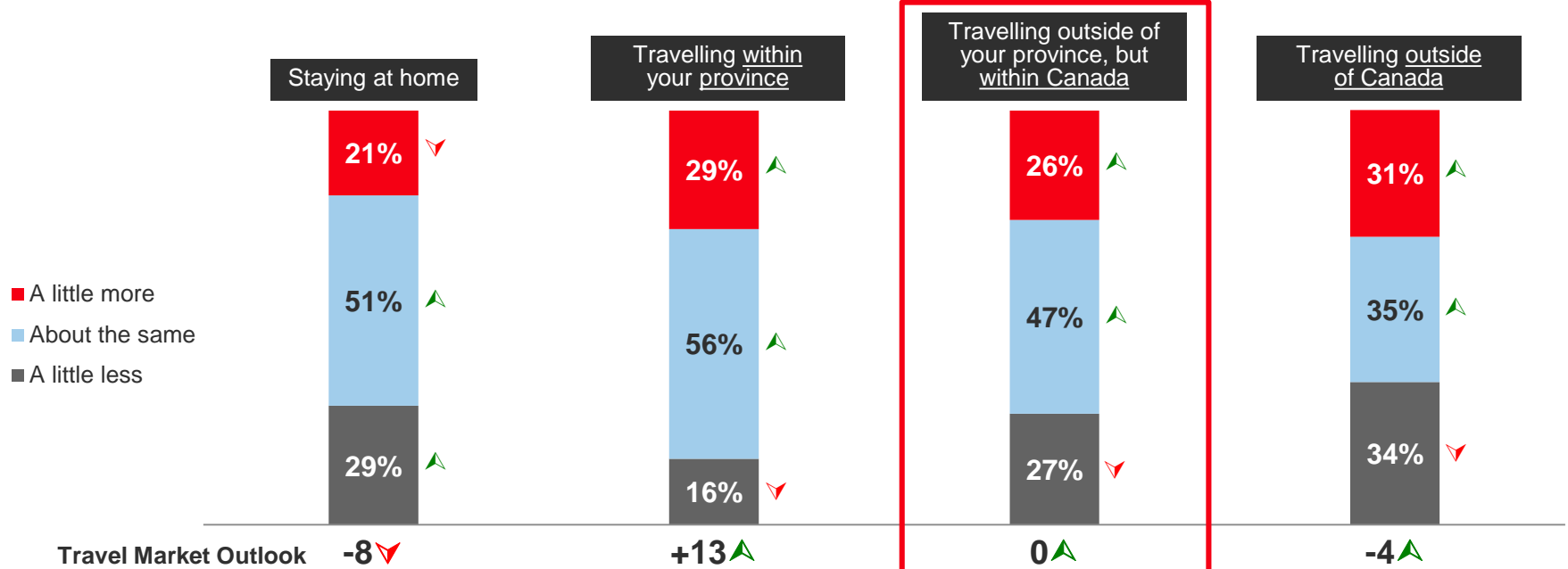
Base: Total Canadians (n=9051)

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

Vacation Intentions (in Next 12 Months)

Travel Market Outlook is the difference between the proportion who say they will spend more of their vacation time at each location in the next 12 months compared to the last 12 months, minus the proportion who say they will spend less time there in the next 12 months compared to the last 12 months.

- ▶ As COVID-19 restrictions ease, Canadian residents intend to spend less vacation time at home (-8, down from +35 in 2020) in favour of more travel in-province (+13, up from -7), more travel to other provinces (0, up from -38), and more travel outside of Canada (-4, up from -61).
- ▶ While the outlook for travel outside Canada is still negative overall, it is also the most improved since 2020, suggesting that Canadian residents are eager to return to international travel.



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

Travel Spending+

- ▶ Canadian residents anticipate spending more on travel post-COVID-19 than they did pre-COVID-19, regardless of the destination.
- ▶ While anticipated spending on international travel is still much higher than anticipated spending on domestic travel, spending on domestic out-of-province travel is projected to see the greatest percentage increase (+36%).

Mean Annual Household Spend on Vacation Trips

	PRE-COVID	POST-COVID	NET CHANGE <small>POST-COVID MINUS PRE-COVID</small>			PRE-COVID	POST-COVID	NET CHANGE <small>POST-COVID MINUS PRE-COVID</small>	
NET Domestic	\$2055	\$2438	+\$383	(+19%)	NET International	\$5308	\$5980	+\$672	(+13%)
Travelling within your province	\$989	\$993	+\$4	(+<1%)	Travelling to the United States	\$1831	\$2016	+\$185	(+10%)
Travelling to other parts of Canada	\$1066	\$1445	+\$379	(+36%)	Travelling to other countries (outside the United States)	\$3477	\$3964	+\$487	(+14%)

* New questions in 2021 GTW – no trending.

Base: Total pleasure travellers who travelled in 2019 (n=6146 Domestic / n=4162 International)

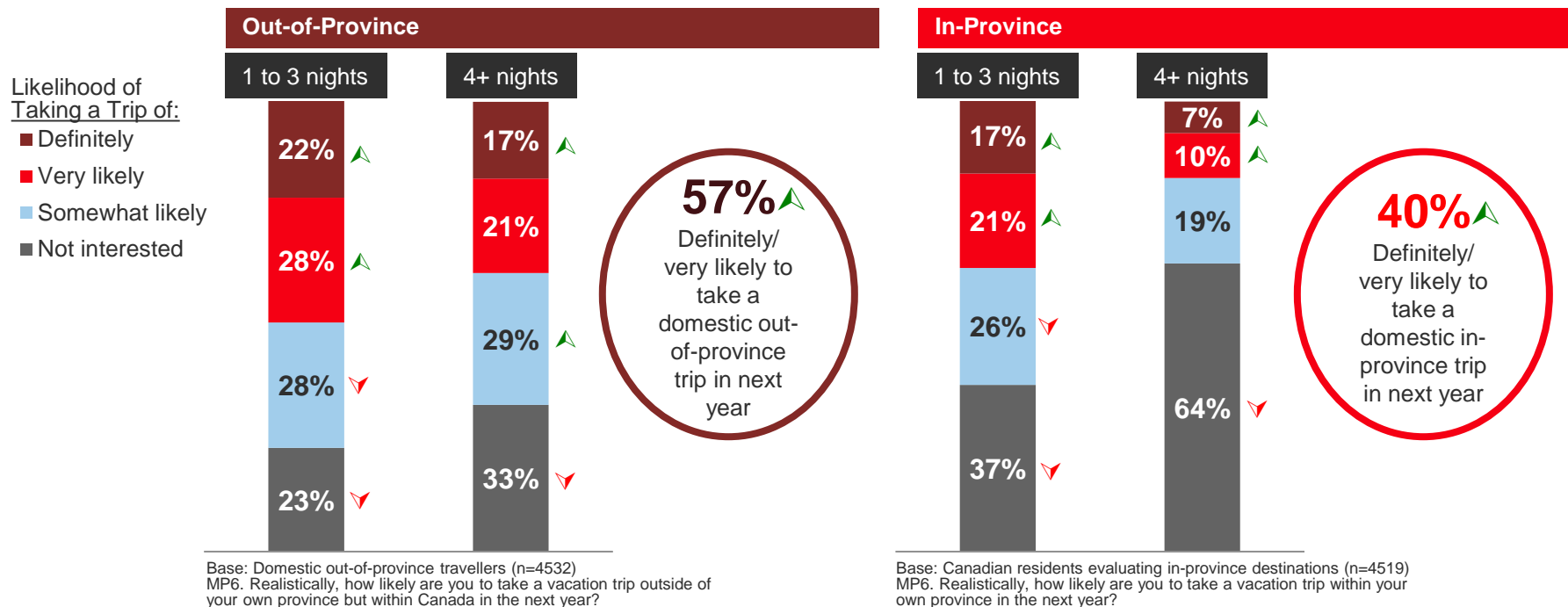
TP2. Thinking about the vacation trips you took to the following destination(s) in 2019, approximately how much did your immediate household spend in total on trips to each destination? A rough estimate is fine. (PRE-COVID)

Base: Total pleasure travellers who expect to travel post-COVID-19 (n= 7012 Domestic / n=5171 International)

TP2B. Thinking about the vacation trips you plan to take to the following destination(s) 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. (POST-COVID)

Likelihood of Taking a Domestic Trip (Next Year)

- ▶ Out-of-province travellers are significantly more likely to take a trip to another province in the next year than they were a year ago (57%, up from 40% in 2020).
- ▶ Canadian travellers are also significantly more likely to take a trip within their province of residence in the next year compared to a year ago (40%, up from 28% in 2020).
- ▶ For both out-of-province and in-province domestic travel, shorter trips of 1-3 nights are more popular than longer trips of 4+ nights.

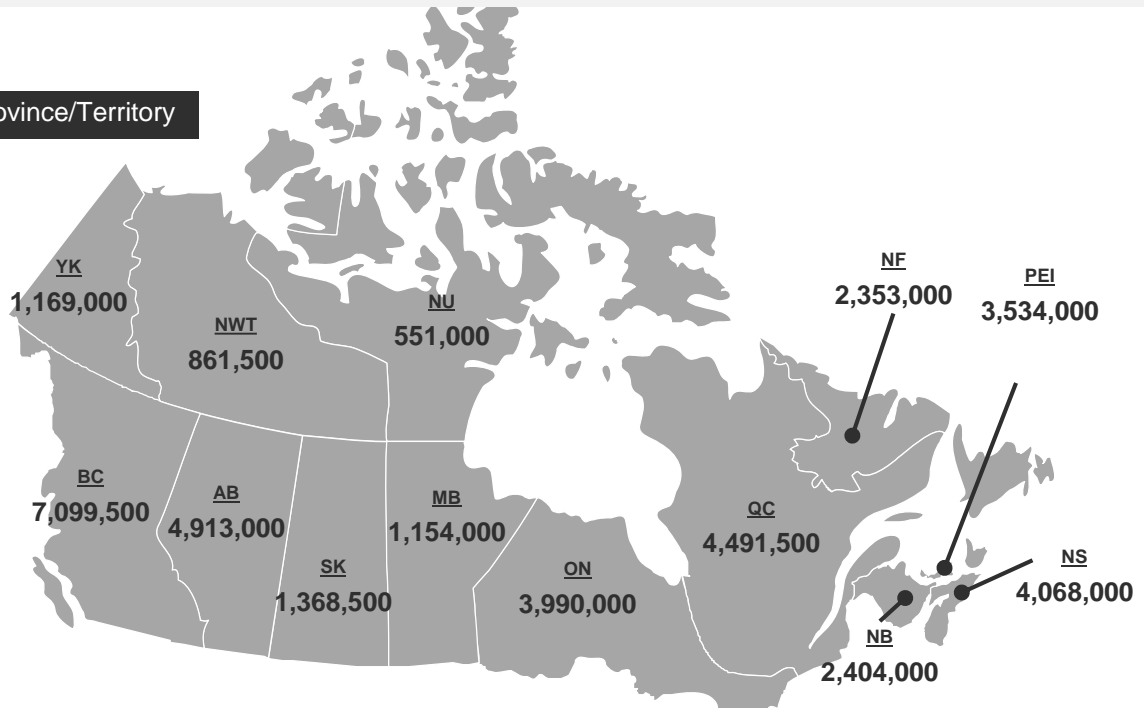


Potential Out-of-Province Market Size

Study data is used to estimate the potential size of the out-of-province travel market by identifying the number of potential out-of-province travellers in each province of residence, then calculating the number that intend to visit each province or territory in the next year.

► British Columbia, Alberta, and Quebec have the largest immediate potential market size for domestic out-of-province visitors.

Next Year Immediate Potential for Province/Territory



Base: Out-of-province pleasure travellers (past 3 years or next year) evaluating each province/territory
 S3. In the past 3 years, have you taken a vacation trip of 2 or more nights outside of your own province, but within Canada where you spent at least 1 night in paid accommodations?
 S5. In the next year, how likely is it that you will take a vacation trip of 2 or more nights outside of your own province, but within Canada where you will spend at least 1 night in paid accommodations?
 BVC1a. You may have already mentioned this before, but which destinations would you seriously consider visiting in the next year?



Impressions of Canada

Perceived Barriers to Travelling Within Canada

- ▶ Cost is the top deterrent for Canadian residents to travel domestically (41%, up from 34% in 2020). Related growing concerns include rising gas prices and poor value for money.
- ▶ As COVID-19 vaccines became more widely available globally in 2021, health risks and safety concerns have declined in importance.



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

Base: Canadian residents (n=9051)

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

Vacation Interests

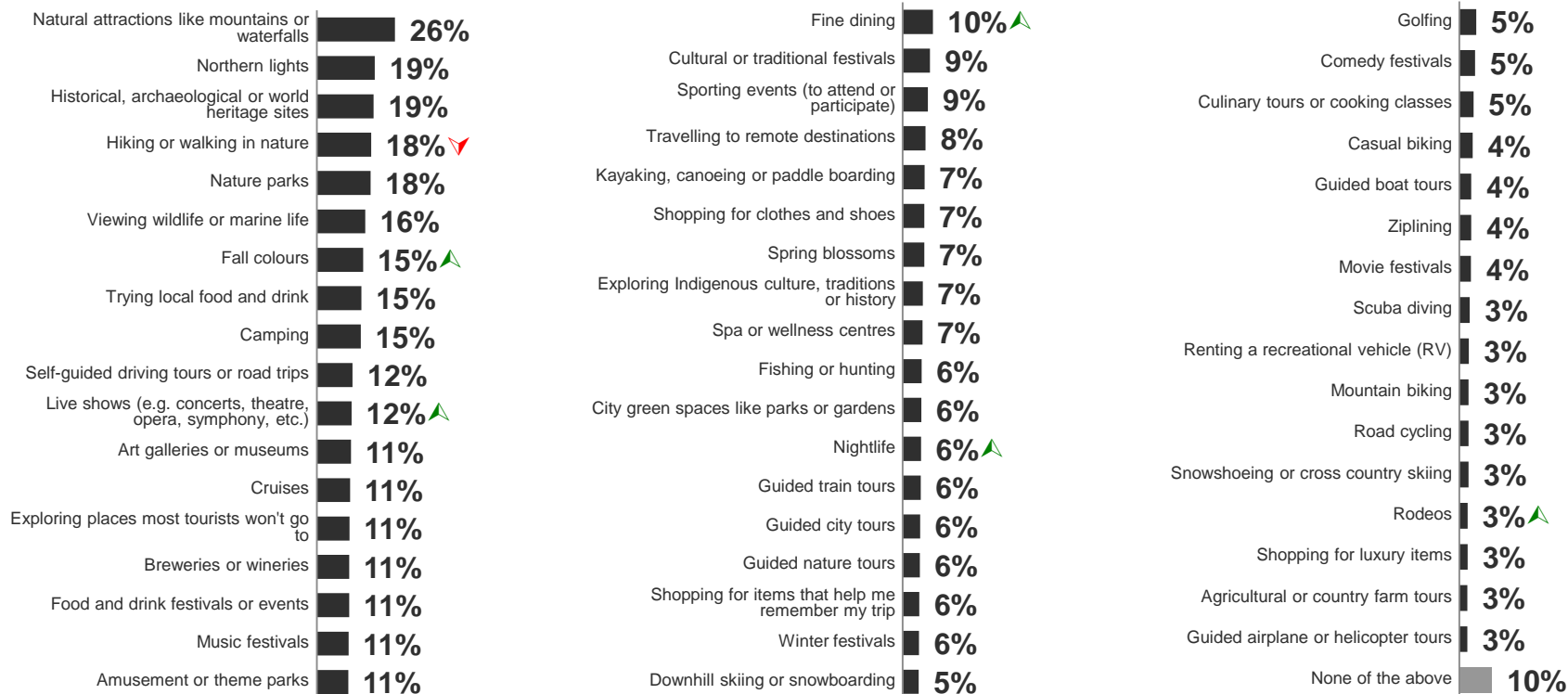
Activities Interested in While on Vacation

- ▶ Along with trying local food and drink, Canadian residents have a strong affinity for nature-based vacation activities.
- ▶ Interest in a wide variety of both nature and city-based activities has decreased compared to May 2021. However, interest has increased for a few popular activities, including wildlife viewing, Fall colours, and viewing the Northern lights.



Activities to Base an Entire Trip Around

► Natural attractions are the top trip anchor for Canadian residents followed by Northern lights and historic sites. While hiking/walking in nature also remains a popular trip anchor, it has dropped in importance relative to 2020.



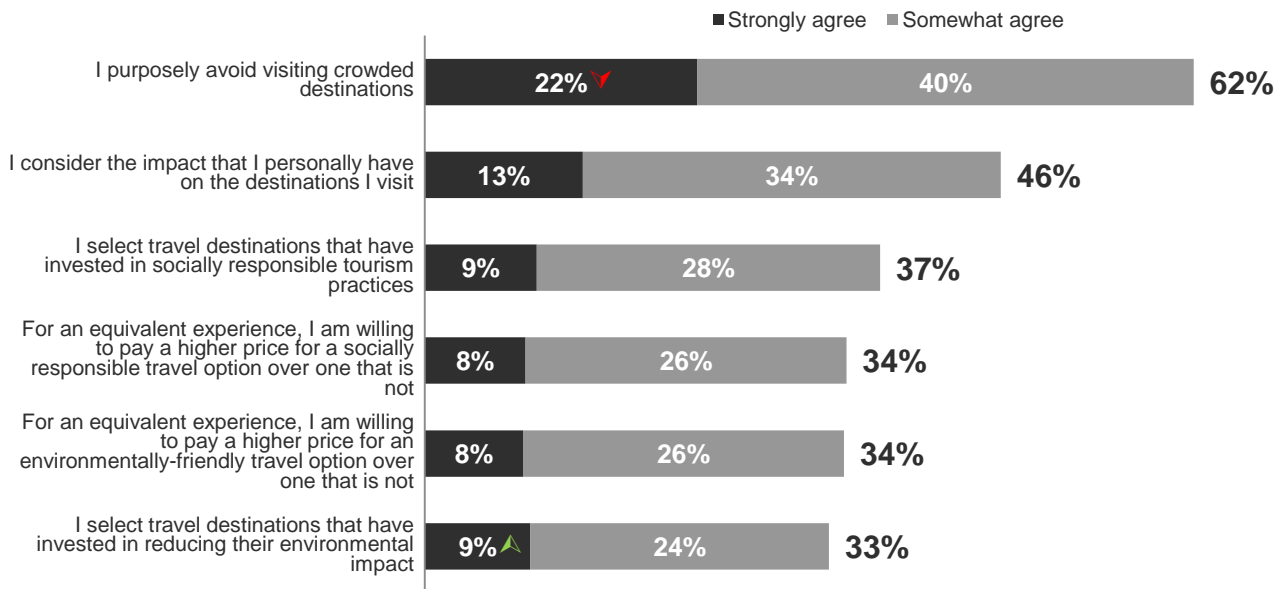
+ New statement in 2021 GTW – no trending.
Base: Canadian residents answering (n=8556)

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

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

Sustainable Travel

- ▶ Almost half of Canadian residents say they are thinking about the personal impact of their travel on destinations, while at least one-third say they select travel destinations based on either environmental or social impacts and would pay more for those options.
- ▶ However, a much smaller number mention the availability of eco-friendly (8%) or socially responsible (7%) travel options as factors influencing their choice of a travel destination.¹



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

¹ Data can be found on page 32.

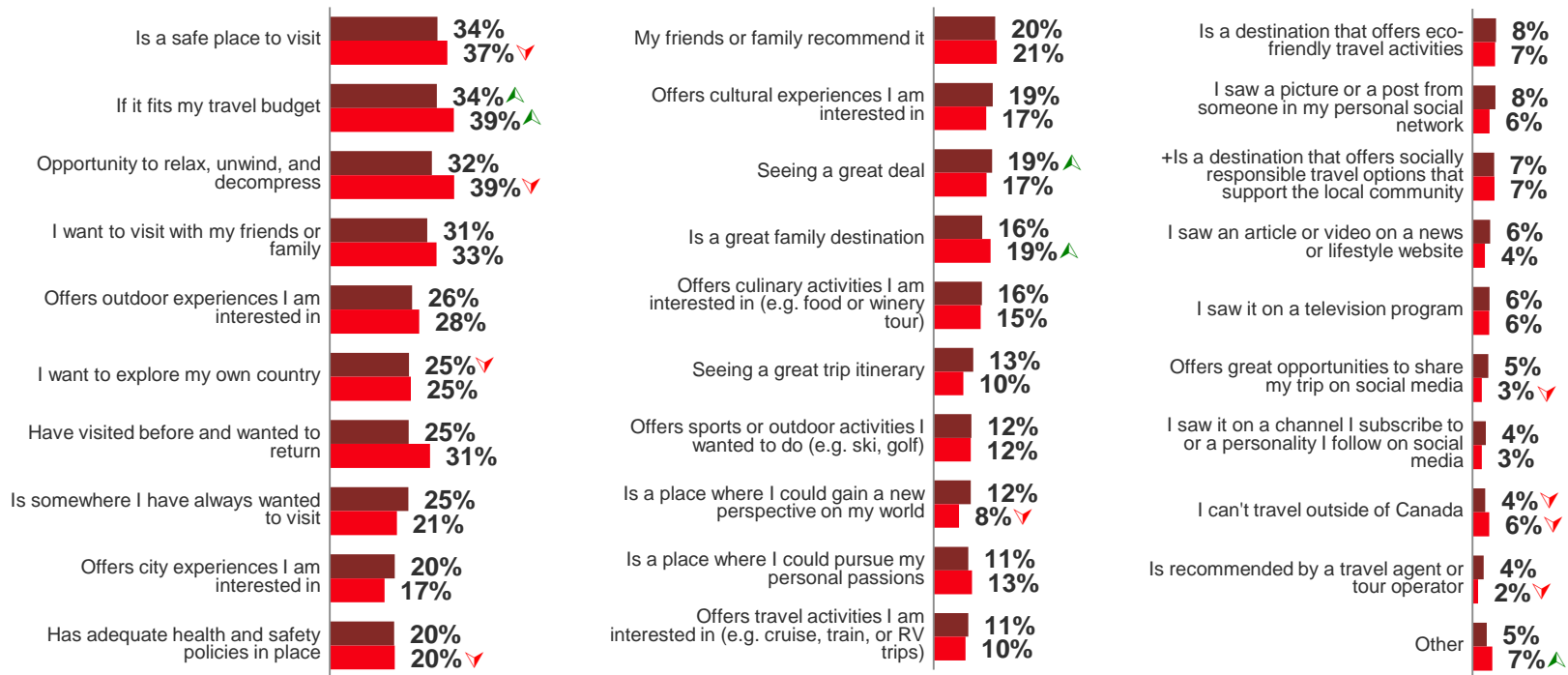
Base: Canadian residents (n=9051)

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 ...

Key Characteristics of Future Trips within Canada

Factors Influencing Destination Choice

► Destination safety, budgetary reasons, and relaxation opportunities are the top factors influencing Canadian residents' choice of destination.



+ New statement in 2021 GTW – no trending.

Base: Domestic out-of-province travellers (n=4170)

Base: Canadian residents evaluating in-province destinations (n=3456)

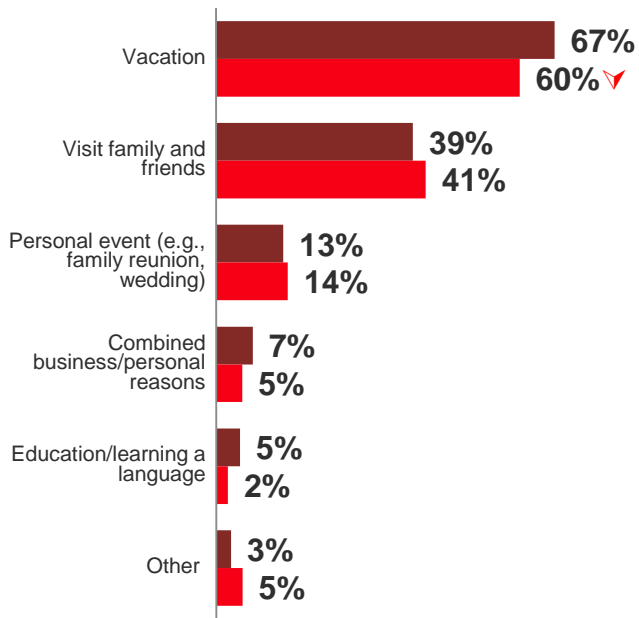
FT3. Thinking of your next trip to [a destination outside of your province / a destination within your province], which of the following would factor into your choice to travel to that destination?

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

Main Purpose and Travel Party of Future Trip

- ▶ Vacation trips will continue to drive travel within Canada in the next year, with VFR travel (trips to visit friends and relatives) also playing an important role.
- ▶ Travel parties will be largely be made up of immediate family – primarily couples trips or family trips with children.

Purpose of Trip



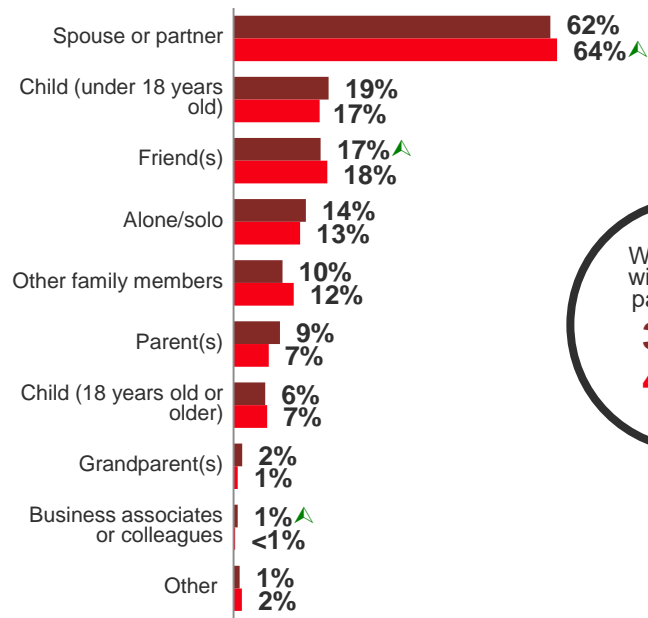
▲ / ▼ Significantly higher/lower than 2020 GTW wave.

Base: Domestic out-of-province travellers (n=4170)

Base: Canadian residents evaluating in-province destinations (n=3456)

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



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

Base: Domestic out-of-province travellers (n=4170)

Base: Canadian residents evaluating in-province destinations (n=3456)

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

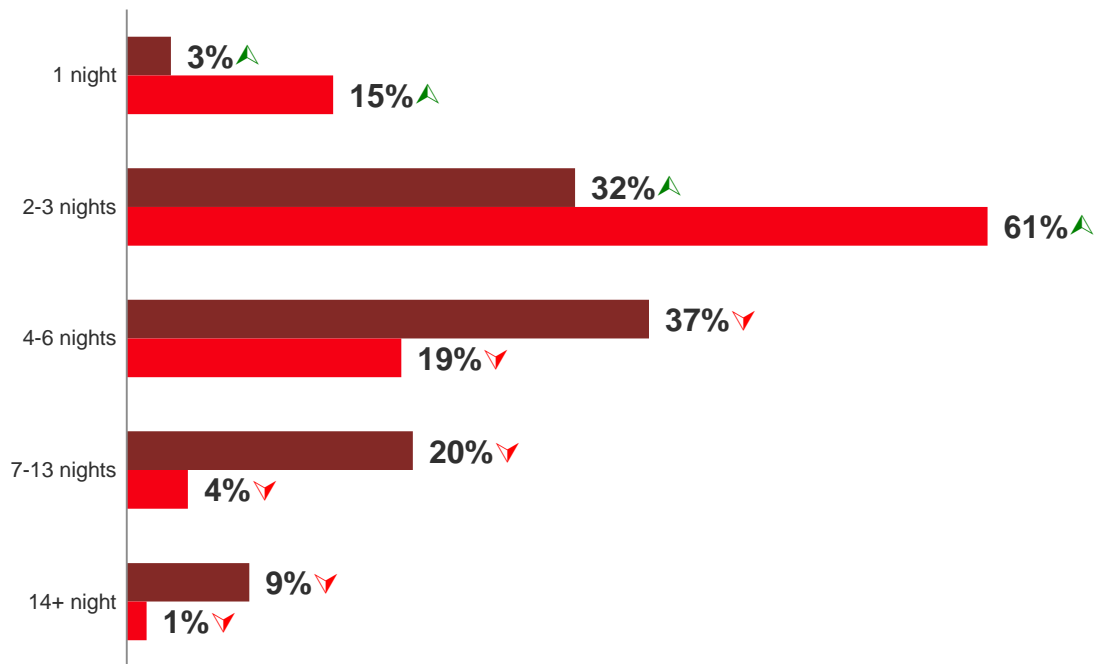
Would travel with spouse/partner only

38% ▼

40% ▲

Number of Nights For Next Trip

- ▶ When thinking of their next trip within Canada, Canadian residents are shifting away from planning longer trips of four or more nights, and towards a preference for shorter domestic trips of three nights or less.



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

Base: Domestic out-of-province travellers (n=4170)

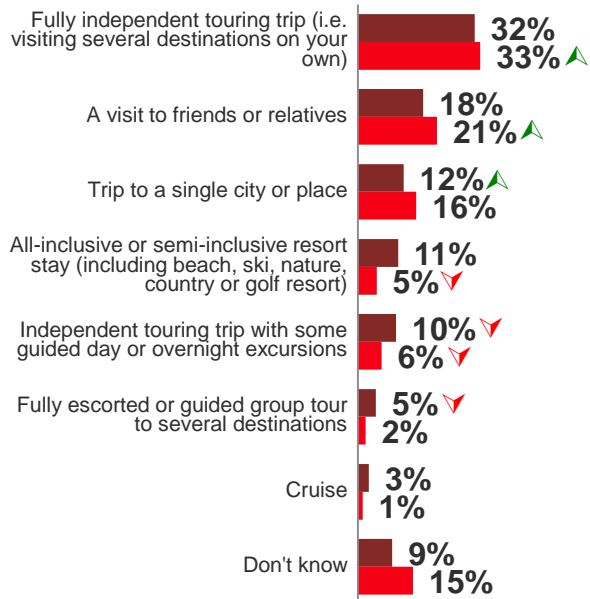
Base: Canadian residents evaluating in-province destinations (n=3456)

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?

Trip Type and Accommodation for Future Trip

- ▶ Canadian residents prefer to travel independently within Canada. Compared to a year ago, more independent trip styles are gaining popularity, while supported travel options are declining.
- ▶ Mid-priced hotels remain the most preferred type of accommodation for a trip within Canada, followed by staying with friends and relatives and vacation rentals.

Trip Type



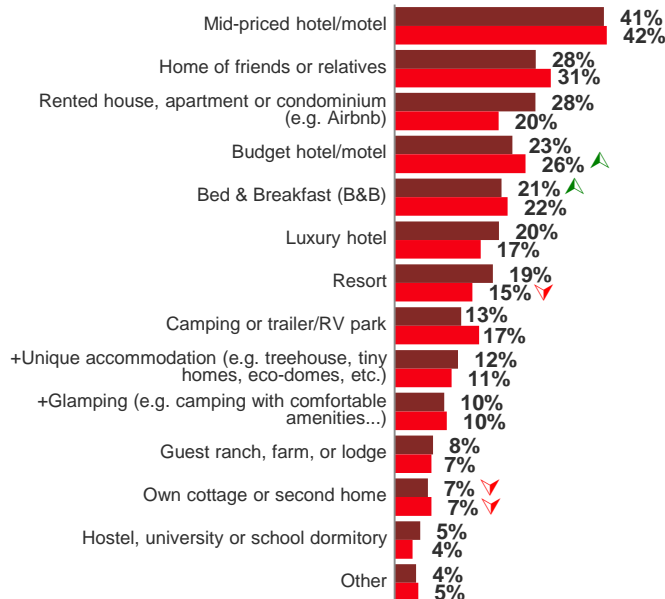
▲ / ▼ Significantly higher/lower than 2020 GTW wave.

Base: Domestic out-of-province travellers (n=4170)

Base: Canadian residents evaluating in-province destinations (n=3456)

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



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

+ New statement in 2021 GTW – no trending.

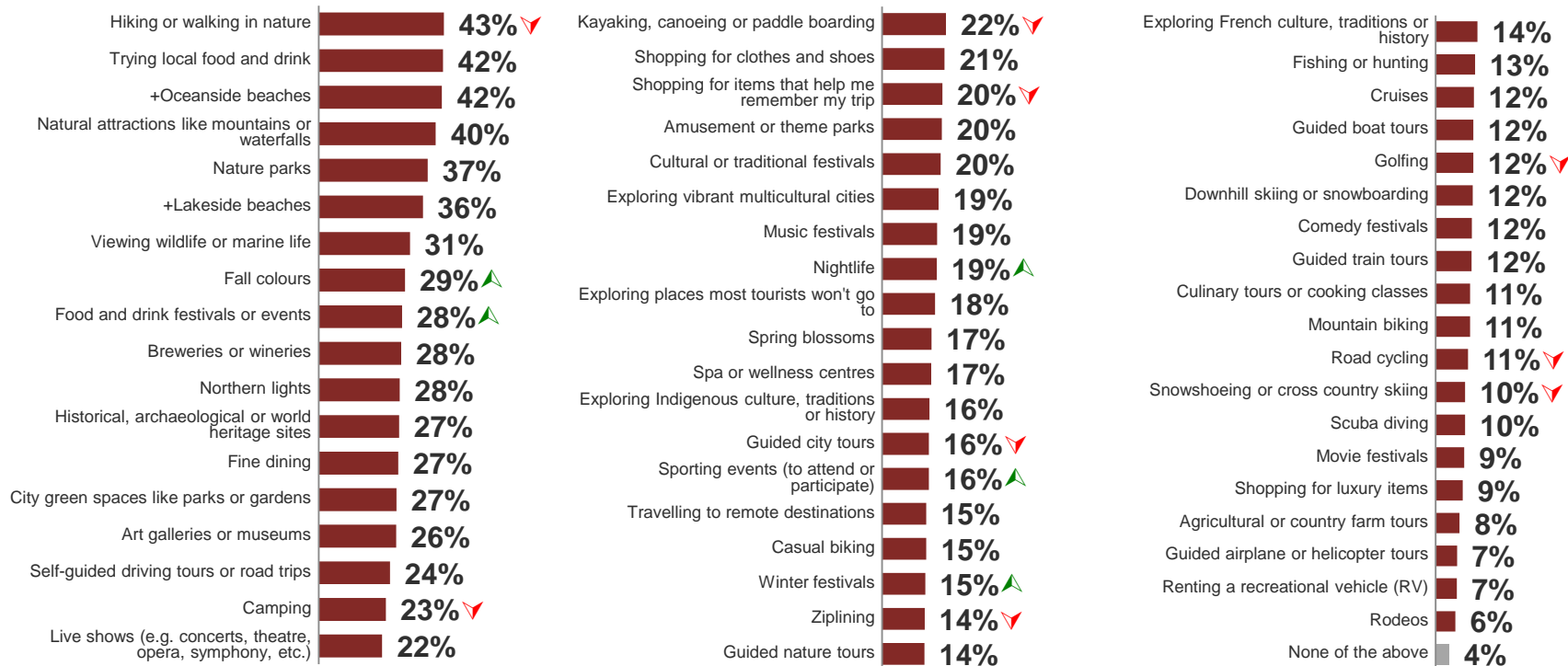
Base: Domestic out-of-province travellers (n=4170)

Base: Canadian residents evaluating in-province destinations (n=3456)

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?

Activities Interested in Within Canada

- Out-of-province travellers have a strong affinity for participating in nature-based activities during domestic trips, though interest in the most popular activity of hiking/walking in nature has fallen relative to 2020. Over the same period, Fall colours and food and drink festivals have gained popularity.



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

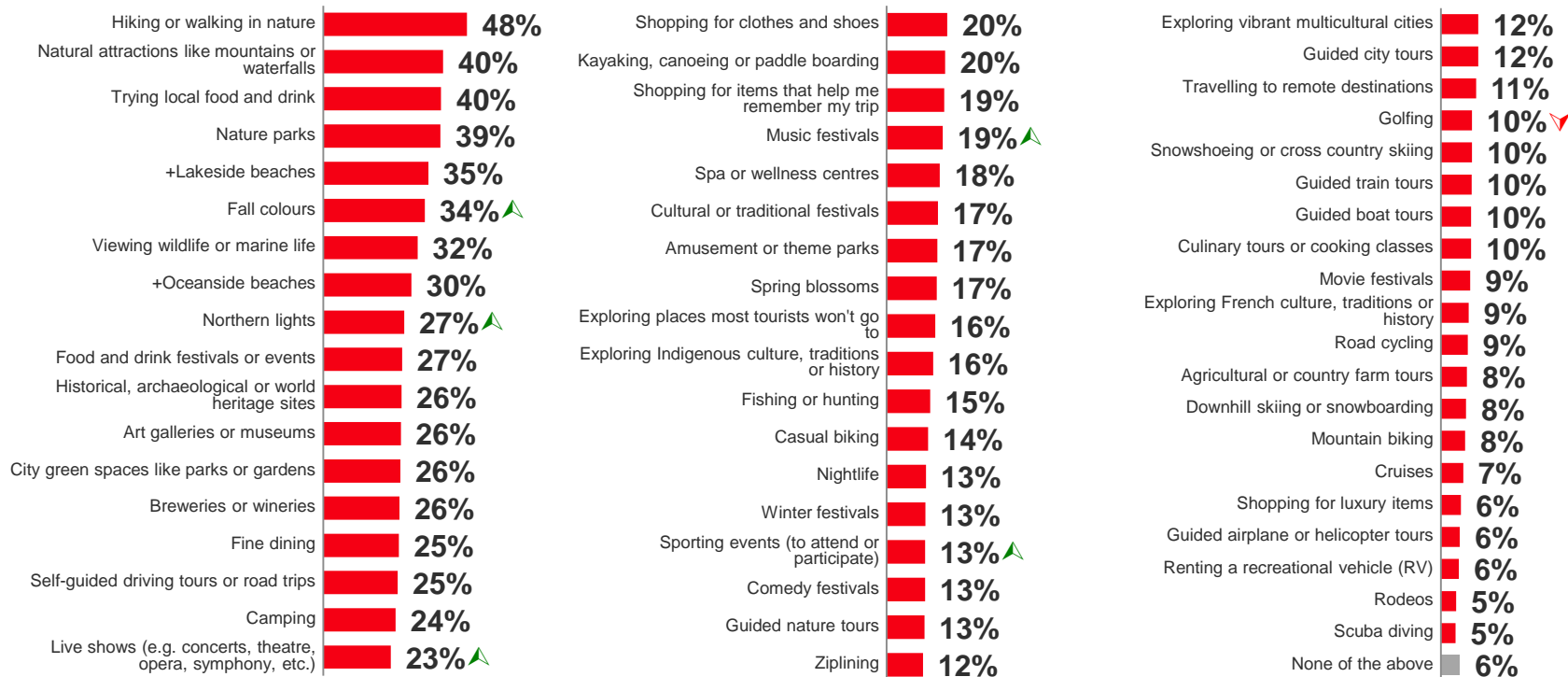
+ New statement in 2021 GTW – no trending.

Base: Domestic out-of-province travellers (n=4170)

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

▶ Those travelling within their province of residence also have a strong preference for nature-based activities. Compared to a year ago, interest in Fall colours and the Northern lights has increased.



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

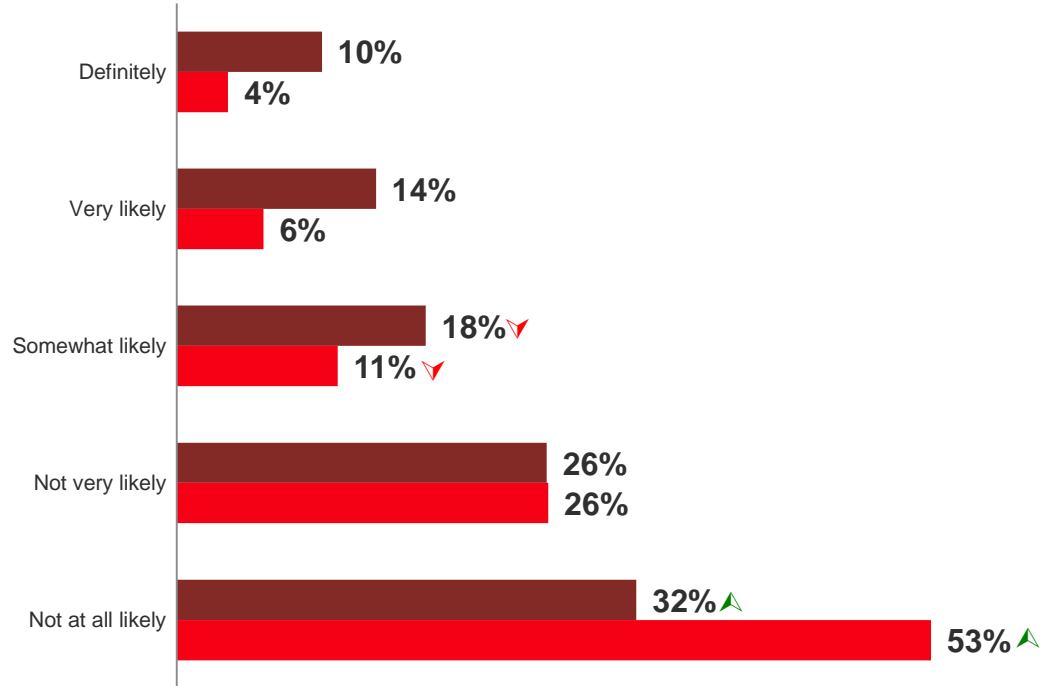
+ New statement in 2021 GTW – no trending.

Base: Canadian residents evaluating in-province destinations (n=3456)

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

Travel Agent Usage for Future

► Travel agents and tour operators play a minor role in supporting domestic travel, and usage has declined since 2020. The use of a travel agent to research or book a trip within Canada is more common for out-of-province trips than for in-province trips.



Definitely/
Very Likely/
Somewhat
Likely
42%
21%

Significantly higher/lower than 2020 GTW wave.

Base: Domestic out-of-province travellers (n=4170)
Base: Canadian residents evaluating in-province destinations (n=3456)

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?