

March 2021

Benchmarking Canadian Traveller Perceptions of Domestic Travel Destinations and Experiences

A National Survey of Canadian Travel Consumers



The findings reported herein are provided to the Tourism Industry Association of Canada (TIAC) i.e., 'the client'. The Client is free to use the findings in whatever manner it chooses, including releasing them to their travel and tourism industry stakeholders and partners and/or media.

Twenty31 Consulting Inc. subscribes to the standards of the World Association of Opinion and Marketing Research Professionals (ESOMAR). ESOMAR sets minimum disclosure standards for primary research studies that are released to the public or the media.

The purpose is to maintain the integrity of market research analysis by avoiding misleading interpretations. If you are considering the dissemination of the findings, please consult with us regarding the form and content of publication. ESOMAR standards require us to correct any misinterpretation.

Note: This report provides a top line overview of the research findings. Detailed insights specific to Canadian provinces and territories, regions and cities could be identified based on further analysis.

For more information or to address questions, please contact:

Oliver Martin

Partner

+1 (416) 721 3544

oliver@twenty31.org

Joe Naaman

Partner

+1 (609) 575-2823

joen@twenty31.org

Sam Mountford

Director

+44 7970 039530

samm@twenty31.org

| Section | Page Starting |
|--|---------------|
| Overview | pg 01 |
| Executive Summary | pg 02 |
| Section 01: Canadians' Leisure Travel Priorities | pg 04 |
| Section 02: Province/Territory: Image and Travel Preferences | pg 14 |
| Section 03: Interest in Destinations in Each Province/Territory | pg 22 |
| Section 04: Awareness and Interest in Tourism Attractions in Each Province/Territory | pg 37 |
| Section 05: Day Trips in Home Region | pg 48 |
| Section 06: Remote Living and Working | pg 57 |
| Section 07: Perspectives and Preferences of Winter/Shoulder Season Travelers | pg 63 |

Overview

The findings detailed in this overview report are based on a survey of a representative sample of 2,750 leisure travellers in Canada. Fieldwork was carried out online in February 2021. A representative sample of the Canadian online population was drawn, stratified by age, gender, region and education. This sample was then sent a survey invitation by email, and respondents screened to identify leisure travellers. These were defined as those who either:

- Had travelled more than 40km from their home for an overnight leisure trip staying in paid accommodation in the last three years
- Planned to travel over 40km from their home for an overnight leisure trip staying in paid accommodation in the next year

Results are representative of the Canadian online adult traveller population and are considered accurate within +/- 2 to 3 percentage points, 19 times out of 20.

The survey uses a questionnaire developed by Twenty31 Consulting in consultation with TIAC. It was fielded in English and French.

Please note that all figures in the charts and tables in this report are expressed in percentages (%), unless otherwise indicated. Total percentages may not add to 100 because of rounding. Question wording and the base sample size is provided in the bottom of select pages.



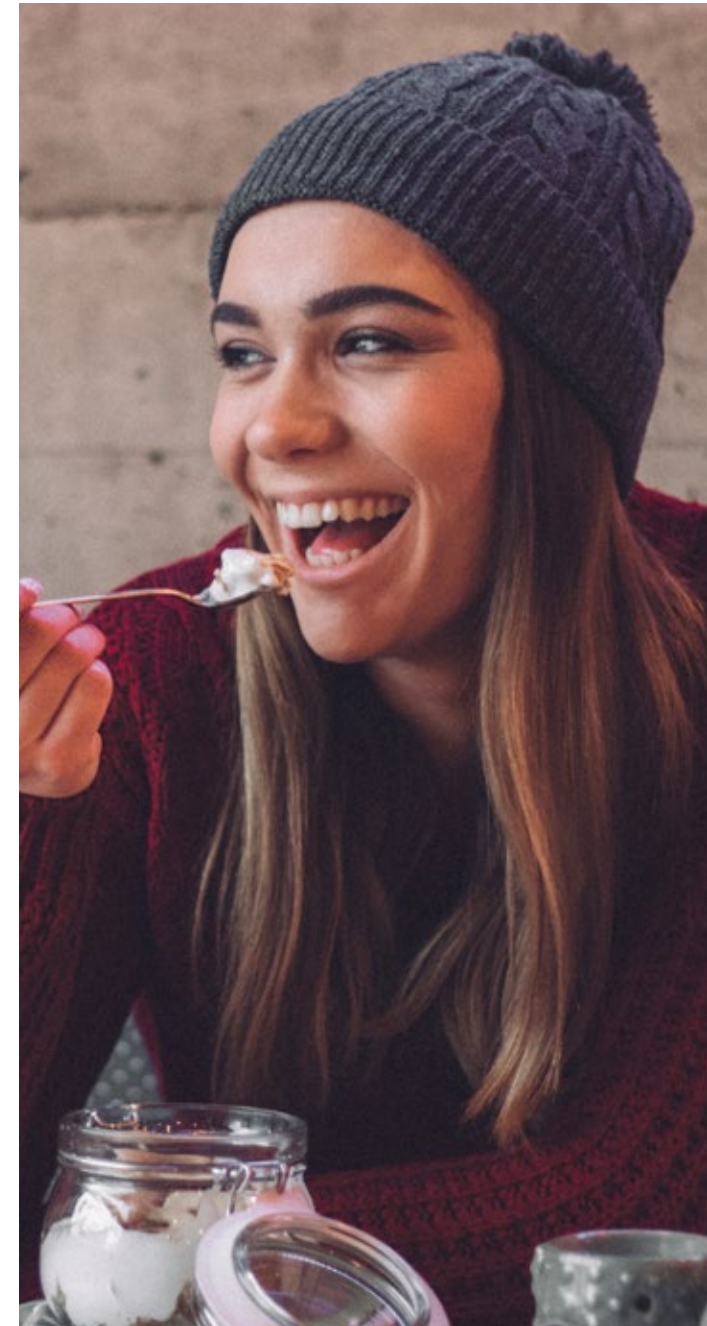
Executive Summary 01

Canadians' Travel Preferences and Plans

Canadians' most common preferences when travelling for leisure within their own country are for a good-value holiday focused on relaxation, often involving authentic local food and local culture and potentially including exposure to the natural world. They are relatively less concerned about combining work with leisure, high-end shopping or specialist activities. While a majority want to travel in high season, a significant proportion – nearly a third – would choose shoulder season for a trip within their own province. Despite the ongoing COVID-19 pandemic, over half say they currently have an overnight leisure trip planned – although less than one in ten of these have actually booked.

How Canadians View Their Country as a Destination

Ontario and BC remain the destinations of choice for much domestic travel among Canadians, both in terms of past travel and future travel intentions. But the survey also reveals that Canadians' views of much of their country is consistent, and highlights its important tourism assets – all Canada's provinces and territories are viewed as naturally beautiful, and most are also seen as having lots to see and do, including for families. Conversely, Canadians tend not to view their country as refined or crowded, and most of the country is not seen as challenging. The three territories are seen somewhat differently – they are appreciated for their unique culture and the new perspective on the world they afford, but are also viewed as more inaccessible. At present, the COVID-19 pandemic is cited as a barrier to travel for many, with Ontario and Quebec viewed as the riskiest provinces to visit in terms of COVID-19 infection risk.



Executive Summary 02



Profile of Key Destinations

When travellers are asked about their interest in visiting specific destinations within their own province and neighbouring ones, the marquee tier 1 destinations tend still to attract most interest and to be well ahead of others – destinations such as Niagara Falls, Victoria, Banff, Montreal and Quebec City. But with significant minorities expressing interest in visiting tier 2 destinations such as Drumheller in Alberta, Regina in Saskatchewan, Gananoque in Ontario and Charlevoix in Quebec, this suggests that there is potential to grow tourism beyond the well-known and over-touristed centres.



Profile and Interest in Key Attractions

Asked to rate their awareness and interest in visiting attractions within their own and neighbouring provinces, a preference emerges for natural parks and cultural attractions, as well as those associated with destinations that already have a high profile and a significant pull, such as Vancouver, the Bay of Fundy or the Rocky Mountains. The findings suggest that there is some work to do to raise the profile both of key destinations and attractions within the three territories, which tend to be relatively little known.



Other Opportunities

The survey also reveals other possibilities for growing tourism in Canada. One promising area may be to promote attractions to people making day trips within their local area, one in three of whom say they currently combine functional visits for shopping with leisure activities. It also reveals the potential for destinations to promote themselves to the 48% of Canadians open to temporary relocation.

March 2021

Canadians' Leisure Travel Priorities

A National Survey of Canadian Travel Consumers

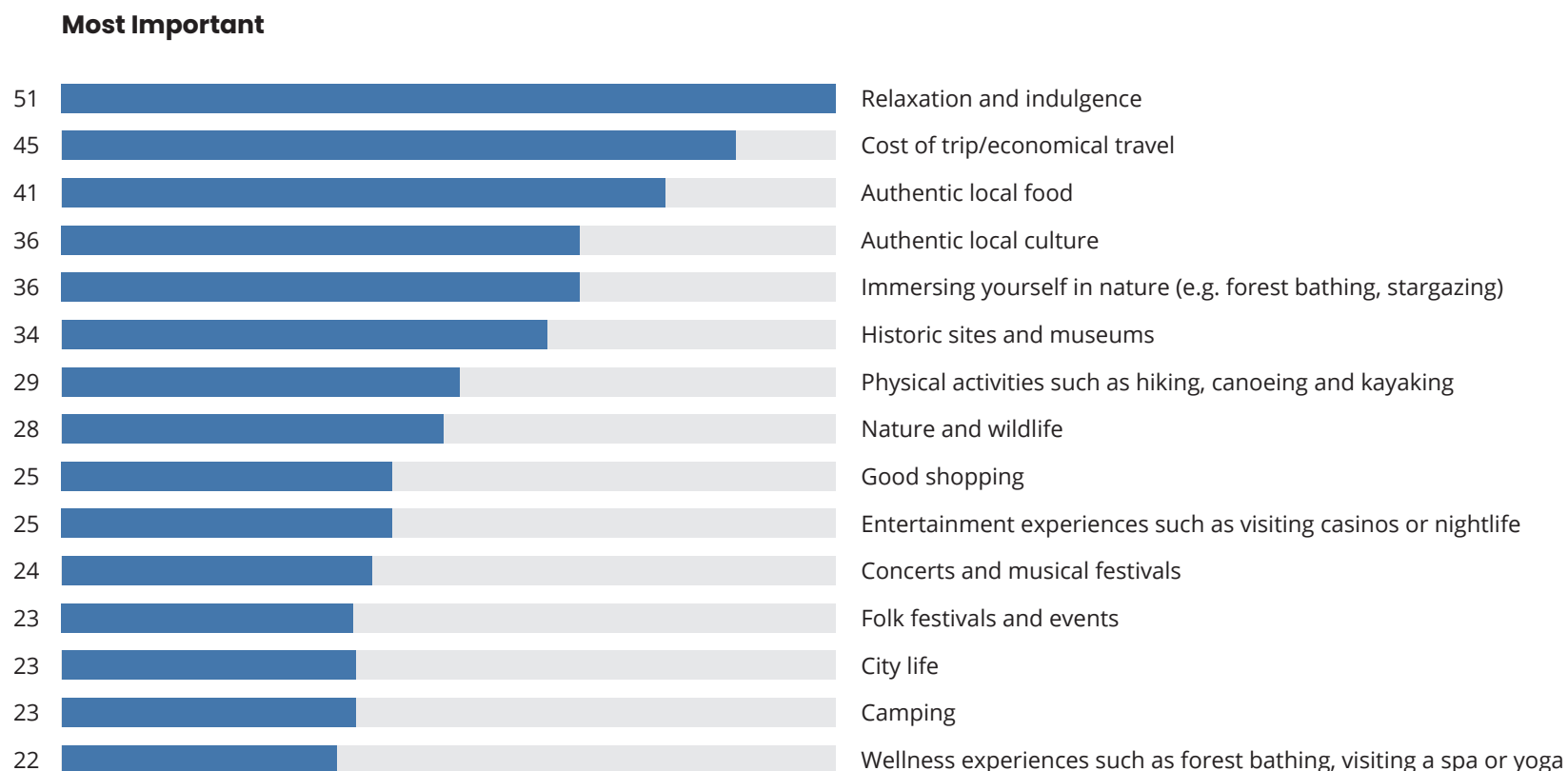


Findings Snapshot

- Relaxation, cost and authenticity are highest priorities when travelling for leisure.
- Work/leisure combination, high-end shopping and specialist activities are lesser priorities.
- Activities involving natural environment seen as most important in future Canadian leisure trip.
- Nearly a third would choose shoulder season for overnight leisure trip within own province.
- Over half have Canadian leisure trip planned, but only just over a quarter have reached the stage of active planning and booking.
- Personal referrals are top inspiration sources for choosing destination.
- Personal referrals are most significant sources for planning travel.
- Online travel sites like Expedia are key for making bookings.



Relaxation, cost and authenticity are highest priorities when travelling for leisure.



Base All respondents (n=2750)

Q9. We would now like to ask you about different experiences that you may seek out while travelling for leisure (whether close to home or further away). We will now show you a few lists of different experiences. For each one, please select the experience that is most important to you, and the experience that is least important for you.

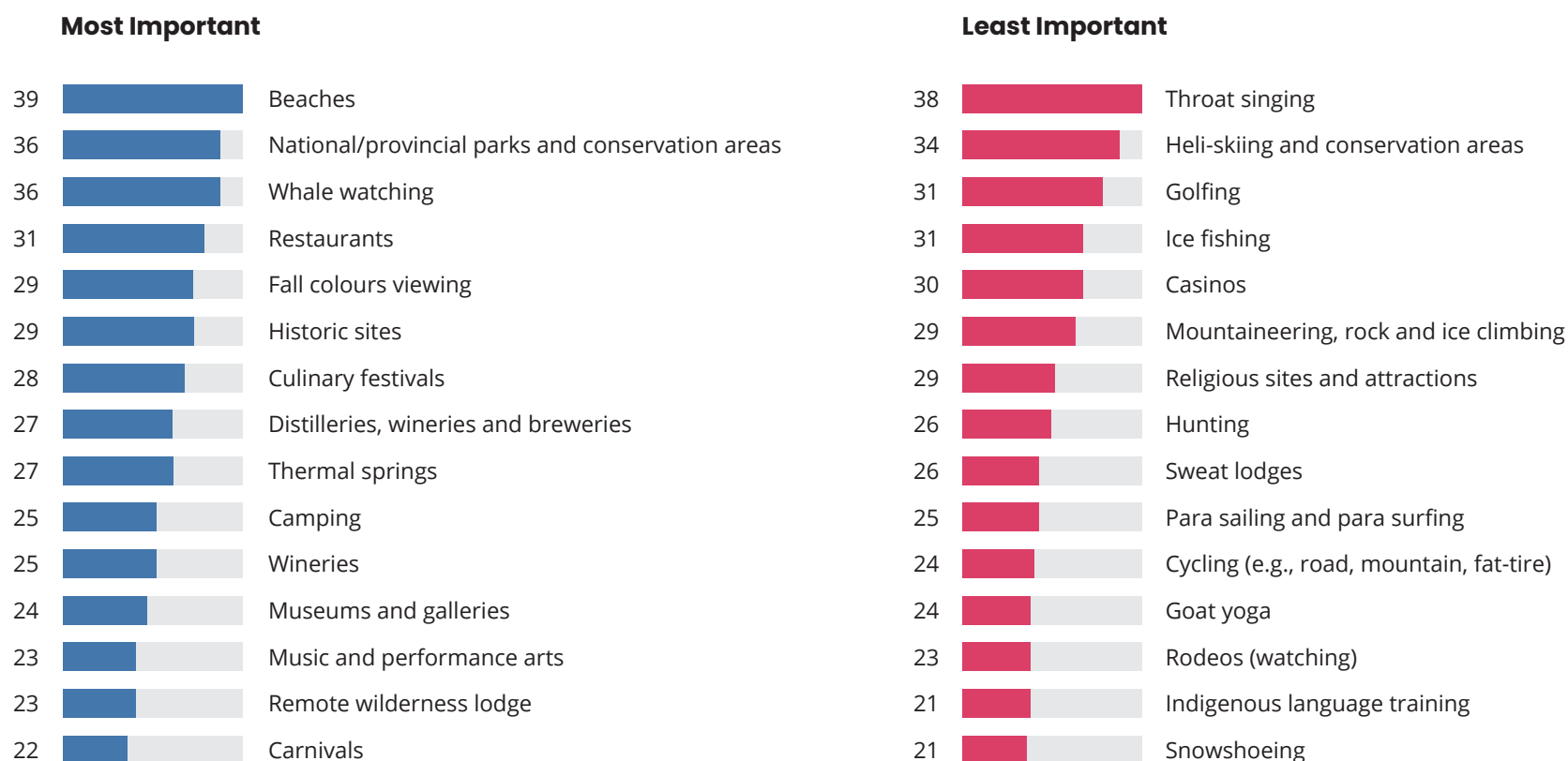
Work/leisure combination, high-end shopping and specialist activities are lesser priorities.



Base All respondents (n=2750)

Q9. We would now like to ask you about different experiences that you may seek out while travelling for leisure (whether close to home or further away). We will now show you a few lists of different experiences. For each one, please select the experience that is most important to you, and the experience that is least important for you.

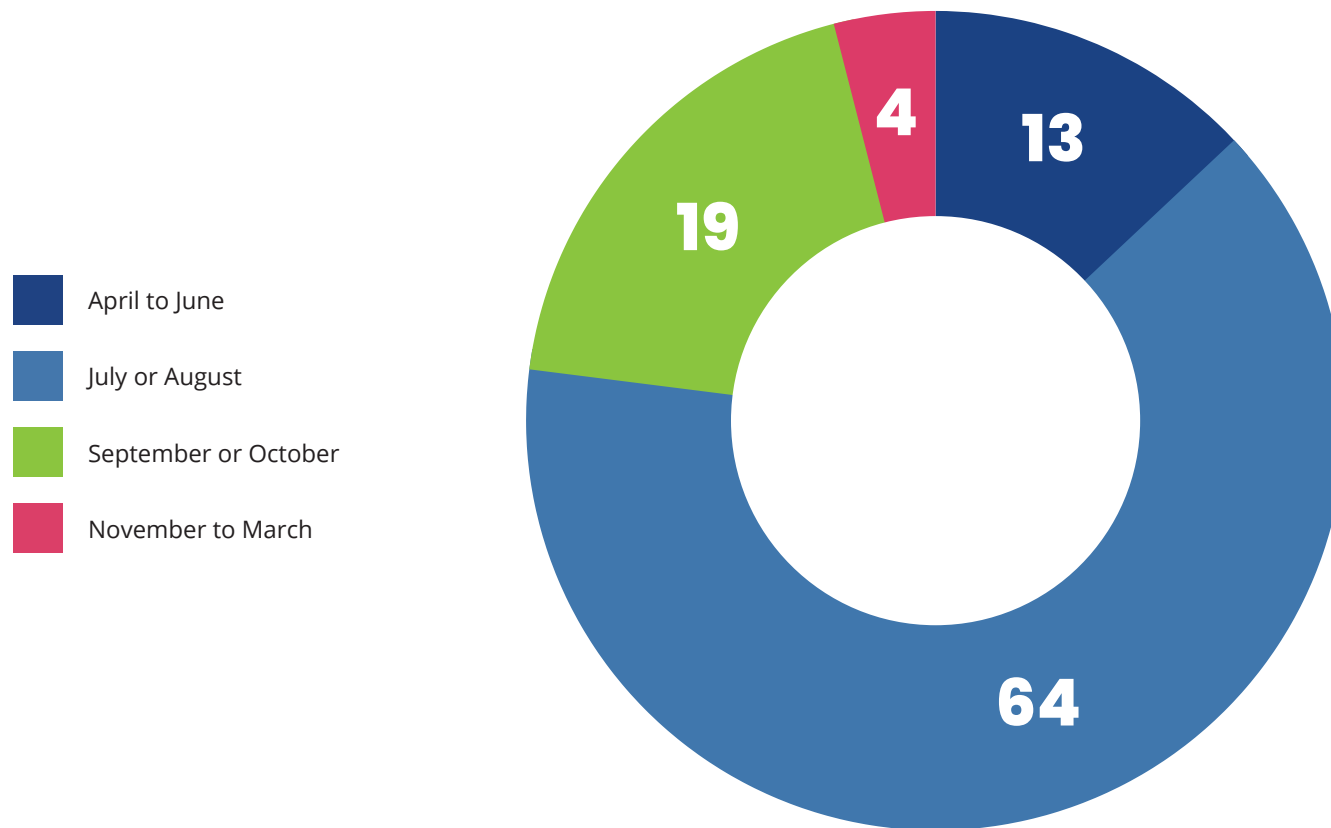
Activities involving natural environment seen as most important in future Canadian leisure trip.



Base All respondents (n=2750)

Q28. You will now be shown a number of lists of activities you might want to do on a future leisure trip within Canada. For each list, please indicate the activity you would be most interested in doing, and the activity you would be least interested in doing

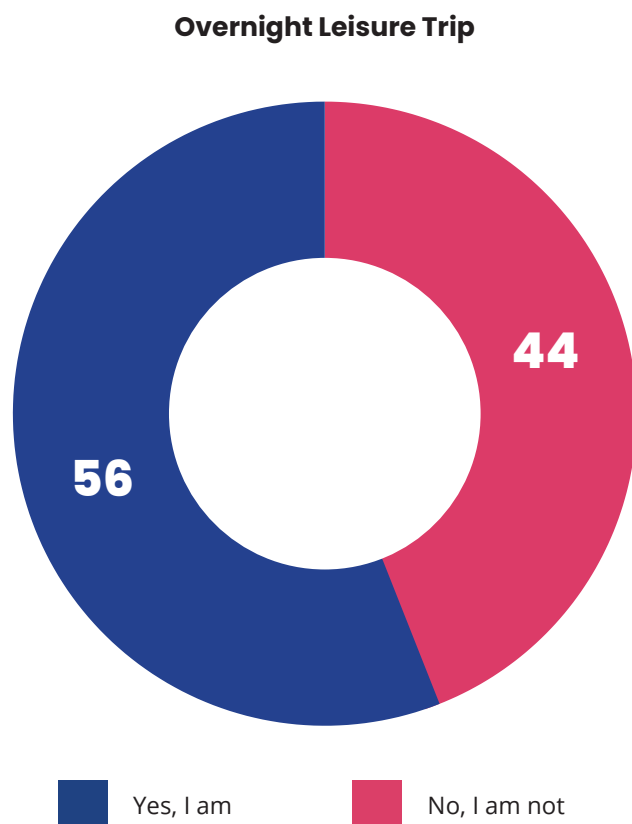
Nearly a third would choose shoulder season for overnight leisure trip within own province.



Base All respondents (n=2750)

Q17. And if you were to make an overnight trip to your own province/territory in the next two years, would you be most likely to travel...?

Over half have Canadian leisure trip planned, but only just over a quarter have reached the stage of active planning and booking.



Current State of Preparation

Still just dreaming about it

38

Have started to gather information about the destination

34

Currently planning the specific details of the itinerary

21

Have already booked or confirmed

7

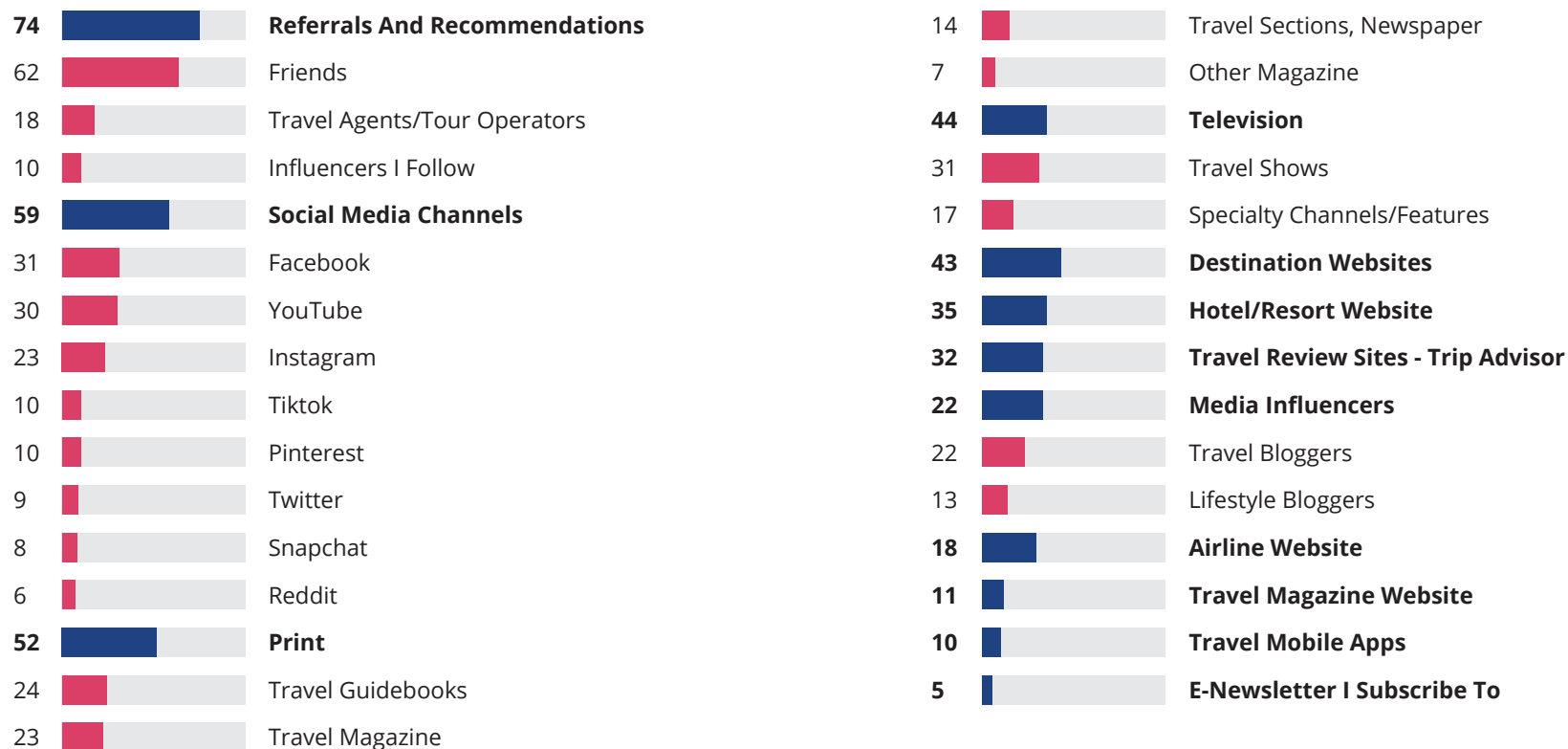
Base All respondents/ administered (n=2750/1544)

Q21. At the moment, are you planning to take an overnight leisure trip within Canada (at least 40km from where you live) during the next six months (that is, between now and July 2021)?

Q22. Which of the following best describes your current state of preparation for this trip?

Personal referrals are top inspiration sources for choosing destination.

Destination Selection



Base All respondents (n=2750)

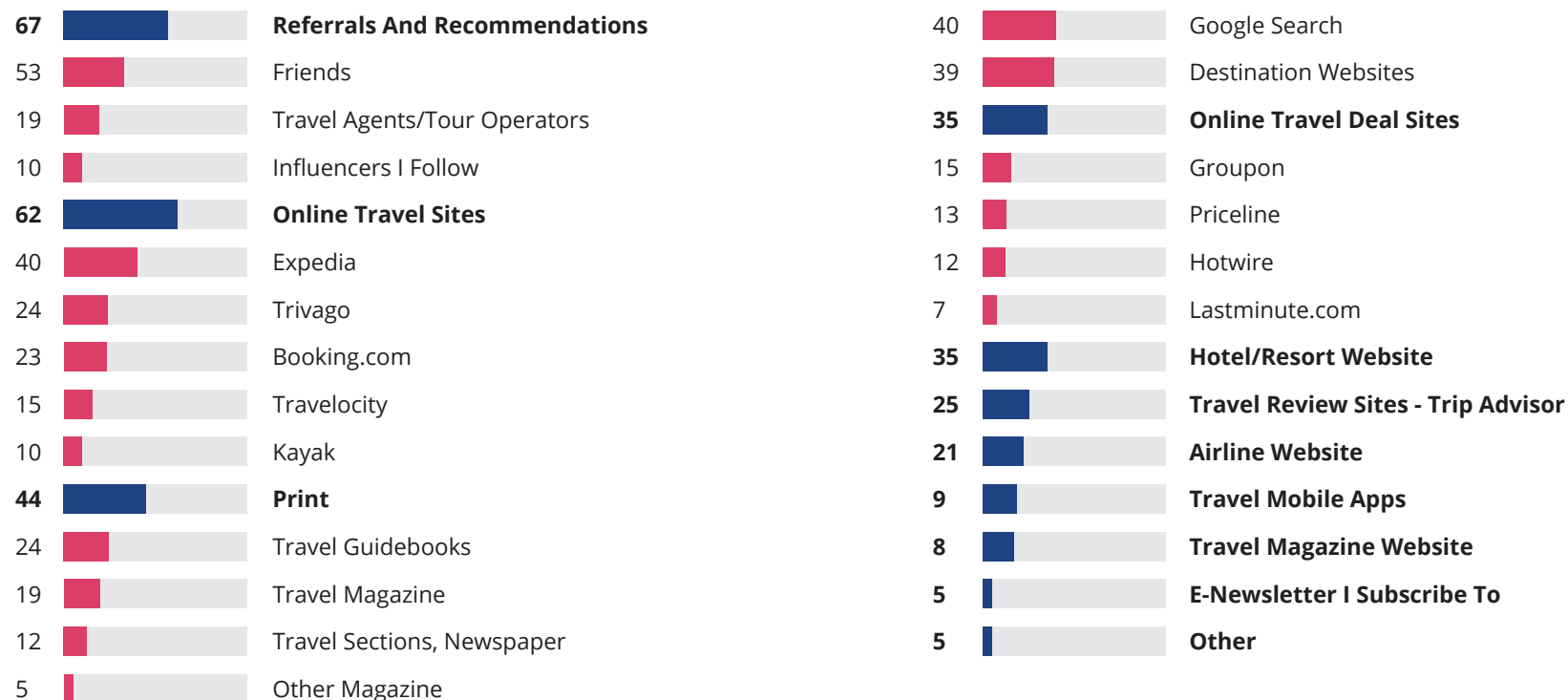
Q30. When you choose a destination within Canada for a leisure trip, which of the following sources are usually most important in inspiring you?

Q31. And for planning your detailed itinerary for a leisure trip within Canada, which of the following would you tend to use?

Q32. And for booking (e.g., travel, accommodation, dining, visits to attractions), which of the following would you tend to use?

Personal referrals are top inspiration sources for choosing destination.

Planning



Base All respondents (n=2750)

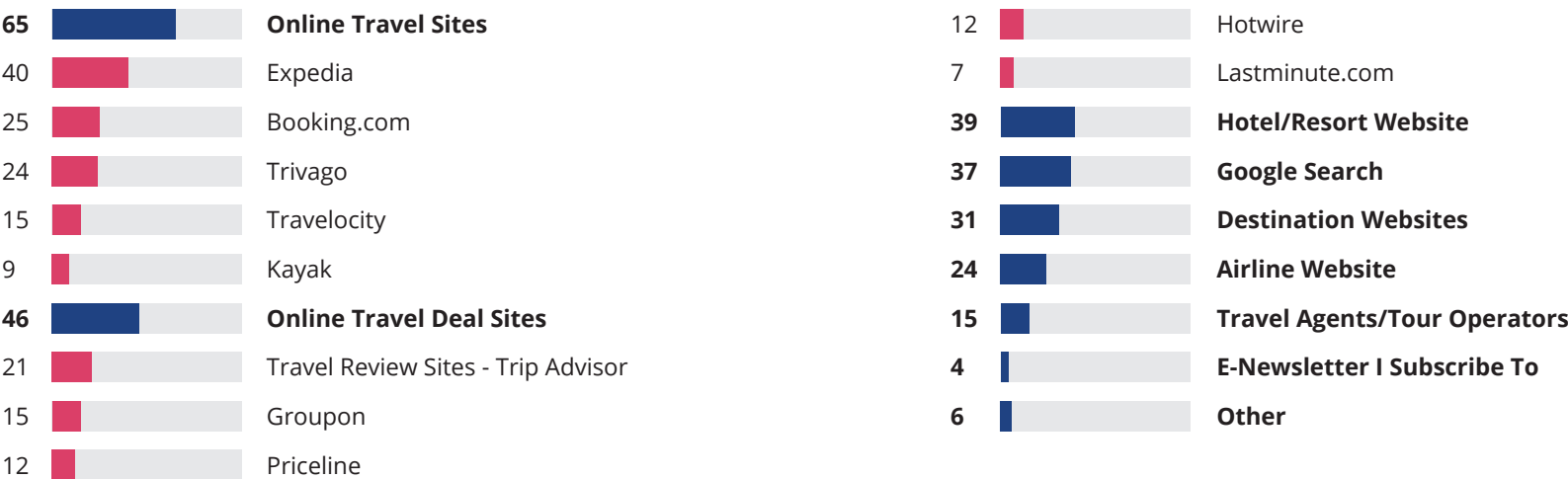
Q30. When you choose a destination within Canada for a leisure trip, which of the following sources are usually most important in inspiring you?

Q31. And for planning your detailed itinerary for a leisure trip within Canada, which of the following would you tend to use?

Q32. And for booking (e.g., travel, accommodation, dining, visits to attractions), which of the following would you tend to use?

Online travel sites like Expedia are key for making bookings.

Booking



Base All respondents (n=2750)

Q30. When you choose a destination within Canada for a leisure trip, which of the following sources are usually most important in inspiring you?

Q31. And for planning your detailed itinerary for a leisure trip within Canada, which of the following would you tend to use?

Q32. And for booking (e.g., travel, accommodation, dining, visits to attractions), which of the following would you tend to use?

March 2021

Province/Territory: Image and Travel Preferences

A National Survey of Canadian Travel Consumers

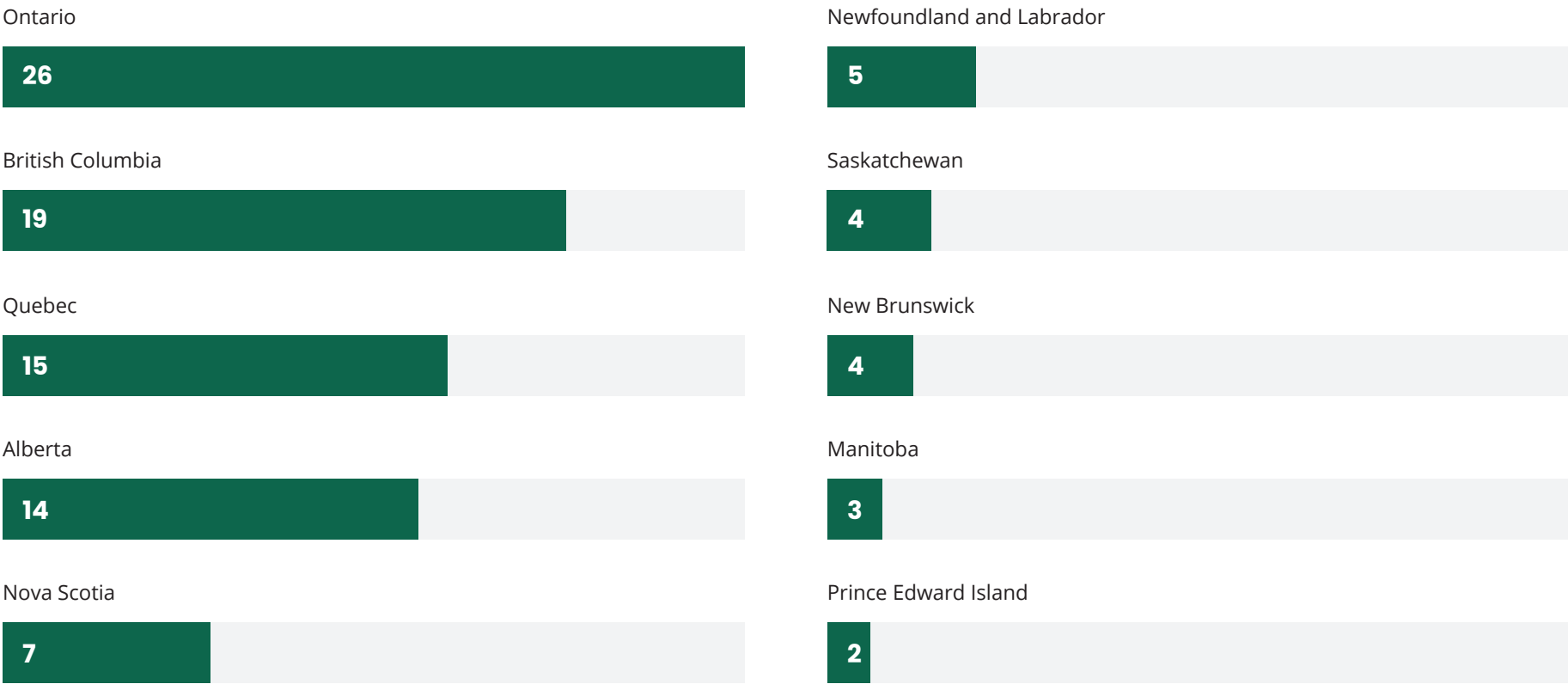


Findings Snapshot

- Between them, Ontario and British Columbia account for nearly half of the recent overnight leisure trips made.
- British Columbia and Nova Scotia tourism offerings are best known to residents and those living in adjacent provinces.
- Ontario and British Columbia well ahead of other provinces in travel preference: Nova Scotia is most popular Maritime province.
- All provinces seen as naturally beautiful; absence of crowds another common association. Northwest Territories, Yukon and Nunavut have clearly distinct image from rest of Canada.
- Beyond COVID-19 concerns, over-familiarity, expense and desire for change of scene are key barriers to local tourism.
- Quebec and Ontario clearly seen as riskiest provinces for COVID-19 infection.

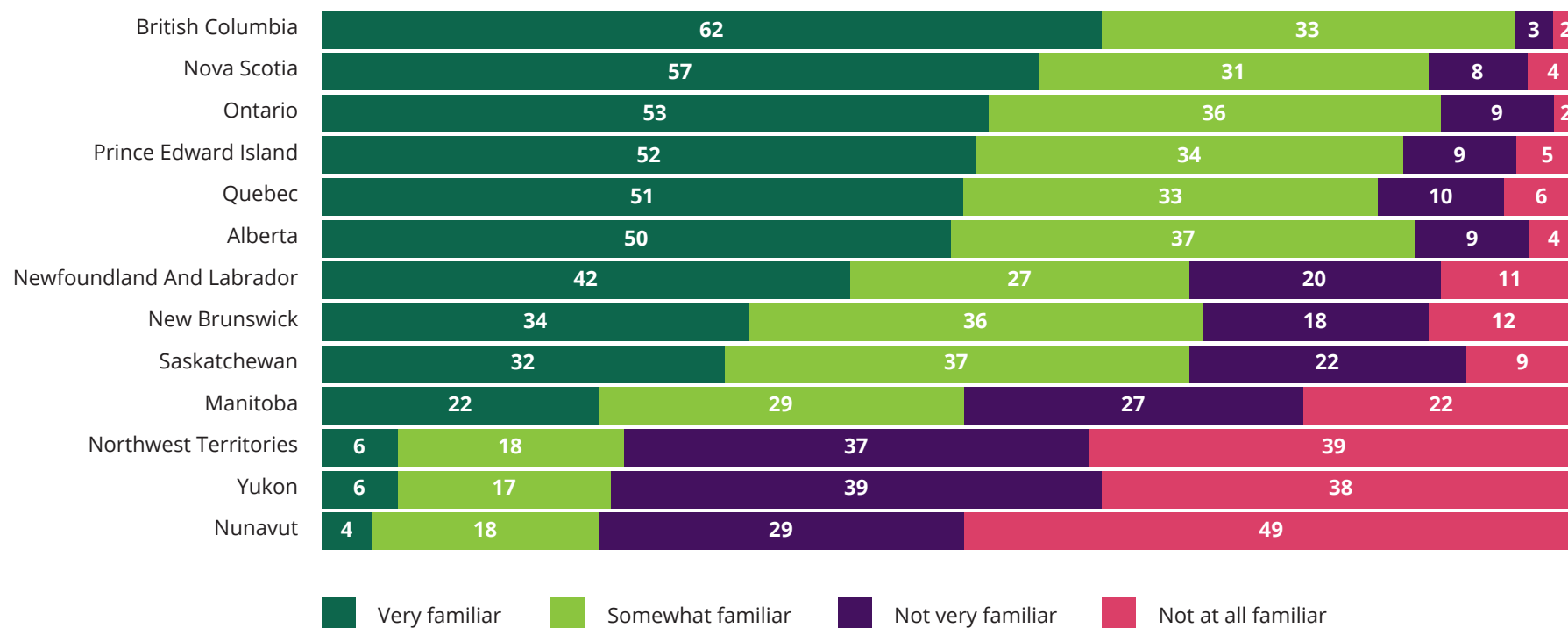


Between them, Ontario and British Columbia account for nearly half of the recent overnight leisure trips made.



Base All administered (n=2500)
Q10. Which province or territory did you travel to or within for your most recent overnight leisure trip within Canada?

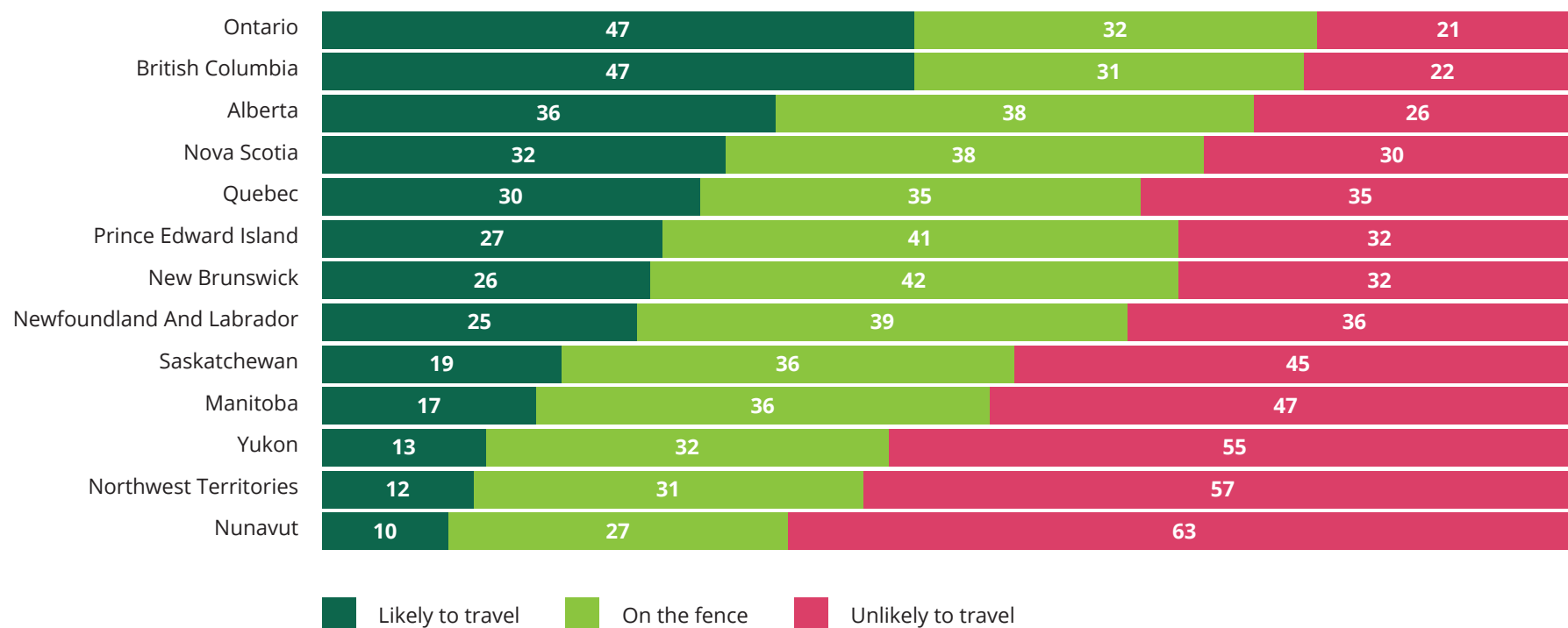
British Columbia and Nova Scotia tourism offerings are best known to residents and those living in adjacent provinces.



Base All administered (n=295-1097)

Q14. How familiar, if at all, are you with which each of the following provinces/territories has to offer when it comes to leisure travel and tourism?

Ontario and British Columbia well ahead of other provinces in travel preference: Nova Scotia is most popular Maritime province.



Base All respondents (n=2750)

Q15. How likely, if at all, are you to travel to each of the following provinces or territories for an overnight leisure trip staying in paid accommodation in the next two years? Please use a scale of 1 to 10, where 1 means you are certain not to travel there, and 10 means you are certain to travel there.

All provinces seen as naturally beautiful; absence of crowds another common association. Northwest Territories, Yukon and Nunavut have clearly distinct image from rest of Canada.

| | BC | AB | SK | MB | ON | QC | PE | NB | NL | NS | NT | YT | NU |
|--|----|----|----|----|----|----|----|----|----|----|----|----|----|
| Naturally beautiful | 83 | 67 | 50 | 53 | 69 | 65 | 76 | 60 | 70 | 74 | 48 | 51 | 46 |
| Lots to see and do | 62 | 48 | 28 | 32 | 58 | 50 | 47 | 39 | 53 | 60 | 32 | 32 | 21 |
| Easy to get to | 60 | 47 | 47 | 34 | 56 | 48 | 47 | 42 | 34 | 58 | 20 | 15 | 12 |
| Family-friendly | 56 | 47 | 45 | 43 | 47 | 43 | 54 | 47 | 56 | 55 | 37 | 38 | 32 |
| Lots of outdoor activities | 56 | 45 | 38 | 39 | 44 | 40 | 43 | 41 | 51 | 48 | 39 | 45 | 36 |
| Good food and drink | 56 | 41 | 32 | 35 | 46 | 49 | 52 | 38 | 53 | 57 | 25 | 25 | 18 |
| Somewhere I can be myself | 53 | 41 | 36 | 33 | 46 | 36 | 40 | 37 | 49 | 48 | 32 | 30 | 23 |
| Range of accommodation | 51 | 41 | 31 | 33 | 46 | 40 | 40 | 38 | 43 | 52 | 20 | 25 | 16 |
| Easy to get around | 48 | 39 | 38 | 29 | 43 | 36 | 47 | 35 | 37 | 49 | 21 | 18 | 12 |
| Exciting | 48 | 33 | 20 | 22 | 43 | 36 | 33 | 29 | 44 | 38 | 31 | 30 | 23 |
| Safe and secure | 47 | 38 | 35 | 35 | 40 | 37 | 46 | 41 | 55 | 48 | 31 | 33 | 27 |
| Lots of history | 47 | 36 | 34 | 36 | 40 | 45 | 40 | 36 | 53 | 48 | 40 | 37 | 29 |
| Relaxing | 47 | 34 | 34 | 33 | 37 | 31 | 49 | 37 | 50 | 51 | 26 | 26 | 25 |
| Good weather | 47 | 30 | 27 | 25 | 42 | 30 | 37 | 32 | 26 | 42 | 17 | 19 | 15 |
| Good shopping | 46 | 37 | 20 | 23 | 45 | 39 | 27 | 31 | 31 | 46 | 15 | 13 | 13 |
| Culturally diverse | 46 | 33 | 29 | 31 | 42 | 38 | 28 | 30 | 36 | 41 | 29 | 27 | 24 |
| Authentic | 41 | 32 | 30 | 30 | 30 | 34 | 41 | 36 | 52 | 42 | 37 | 38 | 34 |
| Crowded | 41 | 28 | 14 | 12 | 46 | 36 | 18 | 17 | 20 | 26 | 12 | 10 | 12 |
| Refined | 39 | 24 | 19 | 17 | 32 | 30 | 21 | 22 | 28 | 29 | 16 | 16 | 18 |
| Good value for money | 39 | 33 | 37 | 30 | 35 | 32 | 39 | 35 | 39 | 43 | 19 | 20 | 15 |
| Somewhere to gain a new perspective on the world | 39 | 33 | 31 | 31 | 29 | 33 | 35 | 34 | 51 | 37 | 50 | 47 | 48 |
| Has a unique culture | 37 | 28 | 26 | 31 | 28 | 38 | 35 | 32 | 55 | 39 | 45 | 45 | 42 |
| Romantic | 37 | 24 | 16 | 16 | 28 | 35 | 34 | 22 | 33 | 34 | 19 | 20 | 15 |
| Culturally unique | 36 | 25 | 24 | 26 | 25 | 38 | 29 | 28 | 48 | 36 | 37 | 36 | 38 |
| Challenging | 32 | 24 | 20 | 20 | 24 | 24 | 19 | 20 | 36 | 21 | 31 | 33 | 33 |

Base All administered (n=295-1097)

Q27. Here is a list of qualities you might associate with some Canadian provinces/territories. For each province/territory listed below, please select which qualities apply to that province.

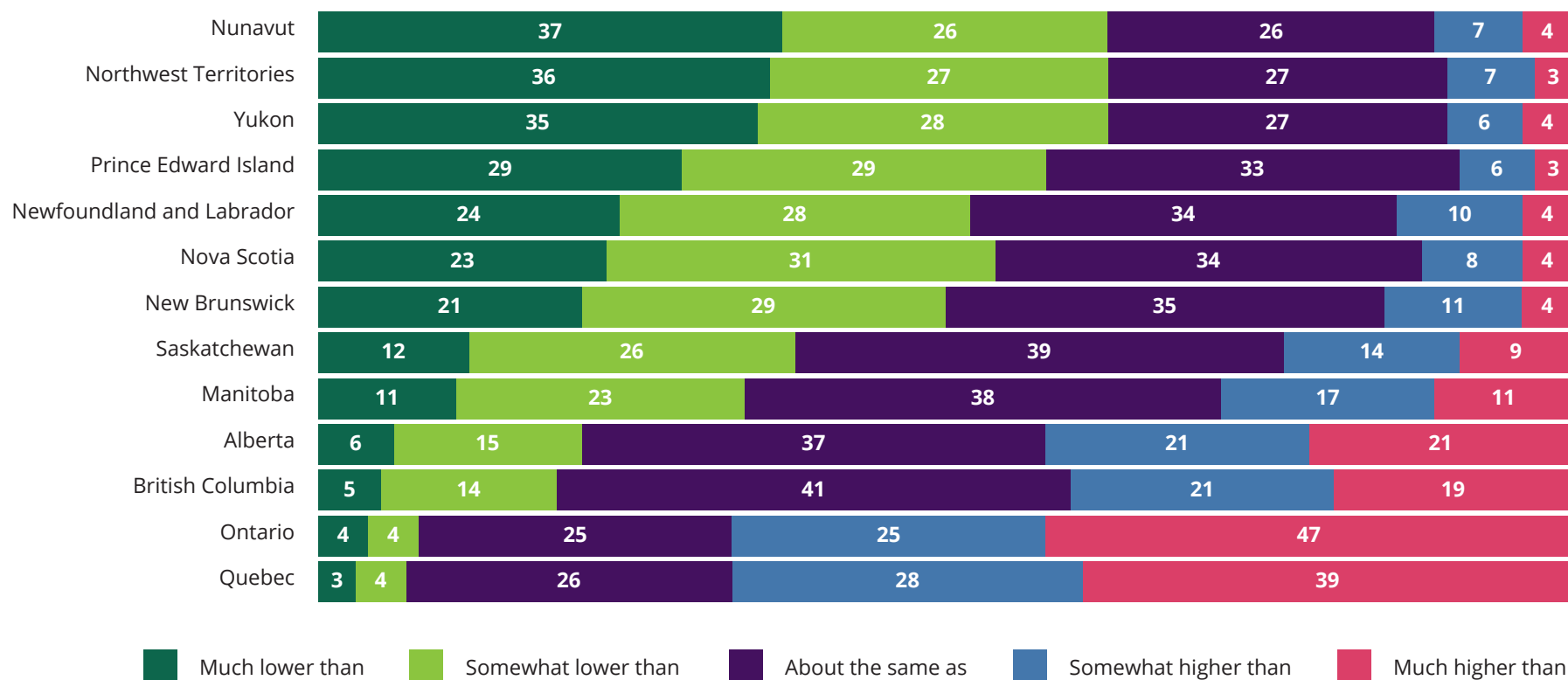
Beyond COVID-19 concerns, over-familiarity, expense and desire for change of scene are key barriers to local tourism.

| | ALL | BC | AB | SK | MB | ON | QC | PE | NB | NL | NS | NT | YT | NU |
|---|-----------|----|----|----|----|----|----|----|----|----|----|-----|-----|-----|
| COVID/health concerns | 47 | 48 | 46 | 46 | 42 | 53 | 38 | 42 | 51 | 50 | 48 | 22 | 25 | 33 |
| Too familiar/seen everything already | 33 | 33 | 36 | 29 | 40 | 26 | 33 | 42 | 38 | 39 | 34 | 67 | 75 | --- |
| Too expensive/poor value for money | 29 | 36 | 28 | 26 | 28 | 32 | 28 | 15 | 26 | 18 | 23 | 33 | 25 | 67 |
| Wish for a change of scene/somewhere new | 29 | 31 | 33 | 30 | 35 | 24 | 26 | 44 | 33 | 25 | 35 | 44 | 50 | --- |
| Too many crowds | 19 | 20 | 23 | 9 | 18 | 25 | 21 | 10 | 8 | 8 | 15 | 11 | 23 | 33 |
| Not enough to do | 16 | 12 | 13 | 20 | 18 | 14 | 21 | 19 | 23 | 15 | 14 | 0 | 25 | 33 |
| Unpredictable or poor weather | 16 | 15 | 16 | 19 | 11 | 14 | 17 | 8 | 17 | 29 | 15 | 11 | 25 | 33 |
| Better/more interesting experiences available elsewhere | 15 | 15 | 16 | 18 | 13 | 15 | 16 | 13 | 15 | 10 | 13 | 22 | --- | --- |
| Not enough time to take a vacation | 8 | 8 | 11 | 12 | 5 | 6 | 10 | 2 | 6 | 3 | 8 | --- | 25 | 33 |
| Not enough history | 3 | 1 | 3 | 1 | 3 | 3 | 4 | 8 | 3 | 1 | 3 | --- | --- | --- |
| No nightlife | 3 | 4 | 2 | 4 | 2 | 3 | 5 | 8 | 3 | 2 | 3 | --- | --- | --- |
| Excessive nightlife | 3 | 3 | 2 | 4 | 1 | 4 | 2 | 2 | 2 | 1 | 4 | --- | --- | --- |
| Not enough people | 2 | 2 | 1 | 1 | 3 | 1 | 3 | 8 | 3 | 3 | 2 | --- | --- | --- |
| Other | 3 | 3 | 3 | 6 | 2 | 3 | 1 | 0 | 3 | 3 | 3 | 11 | --- | --- |

Base All administered (n=3-2750)

Q26. Here are some reasons why people might prefer not to take an overnight leisure trip within their own province or territory. Which of the following would be the most likely reasons for you not to want to make this sort of trip within your own province?

Quebec and Ontario clearly seen as riskiest provinces for COVID-19 infection.



Base All administered (n=2156-2747)

Q29. In your opinion, is the risk of catching COVID-19 in each of the following provinces/territories higher or lower than in [NAME OF OWN PROVINCE/TERRITORY] or about the same?
Please answer using the scale below.

March 2021

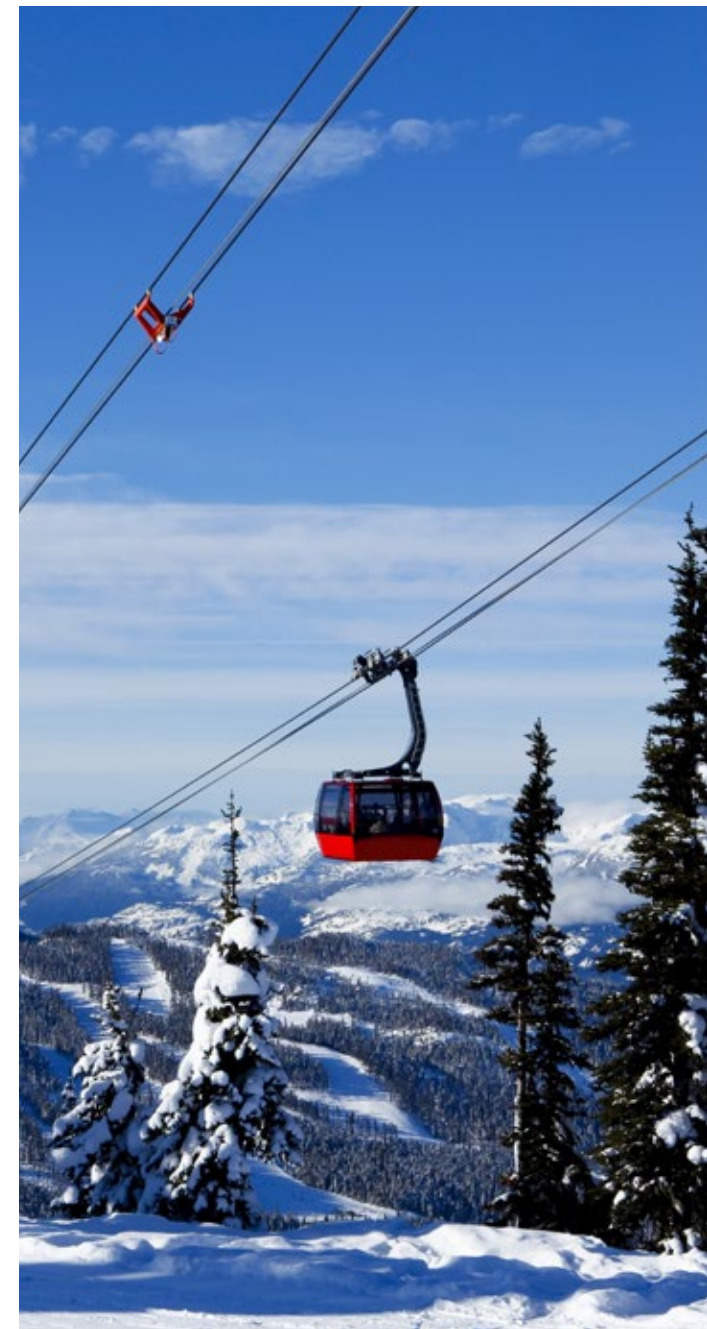
Interest in Destinations in Each Province/Territory

A National Survey of Canadian Travel Consumers



Findings Snapshot

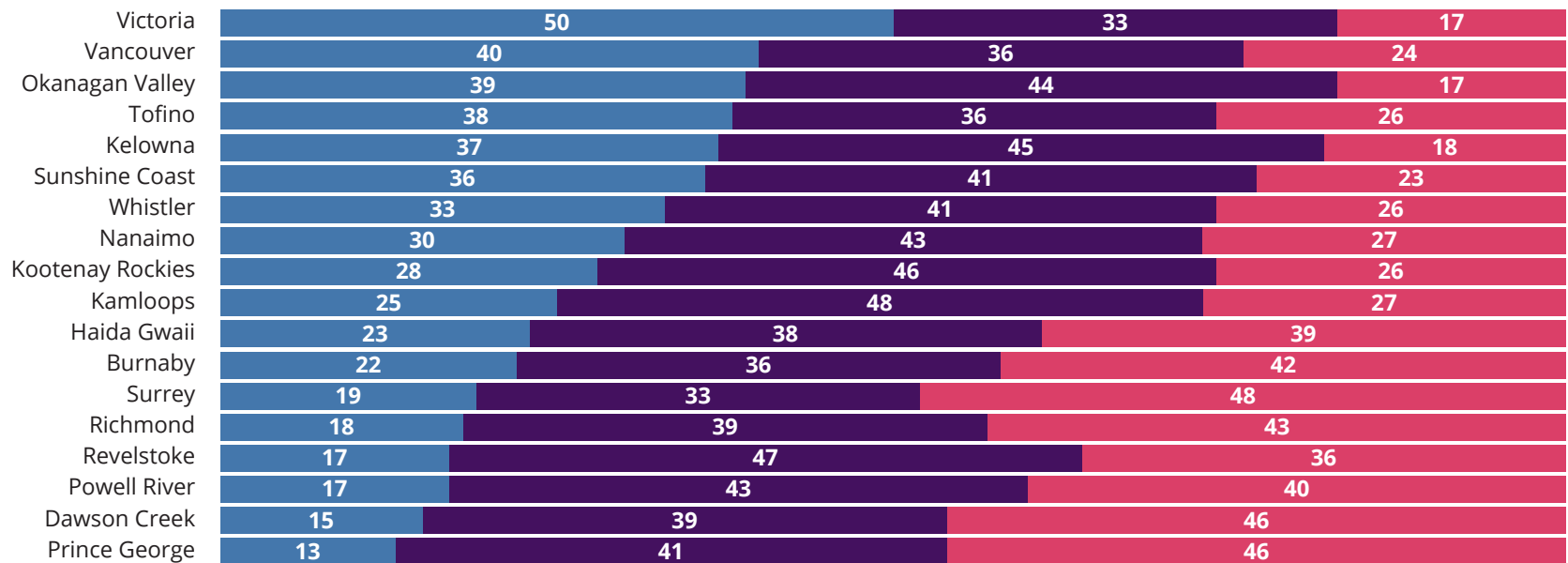
- Interest in visiting Victoria is well ahead of other destinations in British Columbia, including Vancouver.
- Interest is highest in visiting well-known Rockies destinations in Alberta.
- Modest level of interest in most Saskatchewan destinations, but around a quarter interested in Saskatoon and Regina.
- Nearly one in three are interested in visiting Winnipeg, well ahead of other Manitoba destinations.
- At least one in five interested in visiting most destinations in Ontario.
- Significant interest in all Quebec destinations, reaching 50% for Montreal and Quebec City.
- Moncton and Fredericton seen as top destinations in New Brunswick, but interest high across province.
- St John's is clearly seen as top Newfoundland and Labrador destination, but other destinations also interest large minorities.
- Halifax appeals to nearly three in five travellers, with high interest in several other destinations in Nova Scotia.
- Between one third and a half interested in visiting all Prince Edward Island destinations.
- Modest level of interest in Northwest Territories urban centres.
- Similar levels of interest – just under a quarter - in travel to Whitehorse and Dawson City.
- Little differentiation in interest between Nunavut destinations suggests low awareness.



Interest in visiting Victoria is well ahead of other destinations in British Columbia, including Vancouver.

British Columbia

Ratings of Travellers Living in BC and Neighbouring Provinces

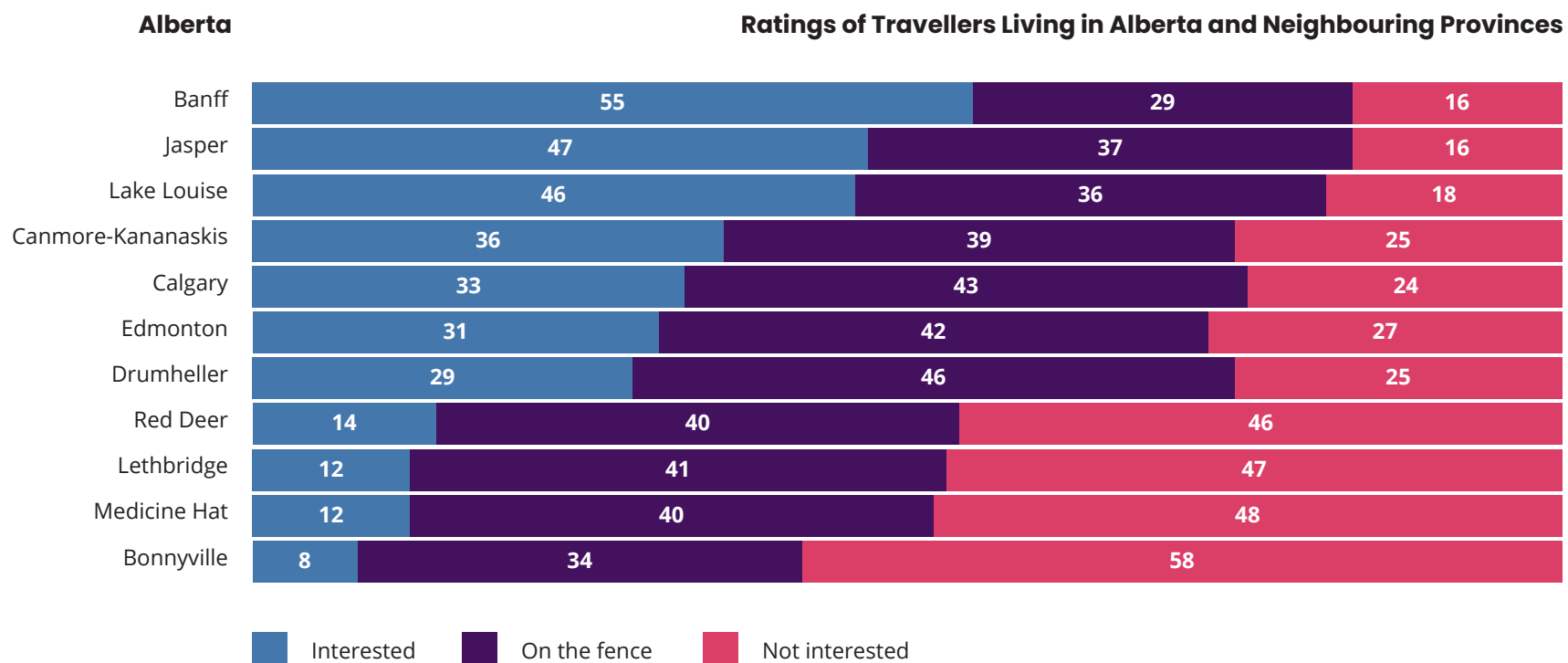


Interested On the fence Not interested

Base All administered (n=532)

Q23. Here are some destinations that you might choose to travel to within your own province/territory and neighbouring provinces/territories. For each one, please indicate how interested, if at all, you would be in travelling there for leisure purposes.

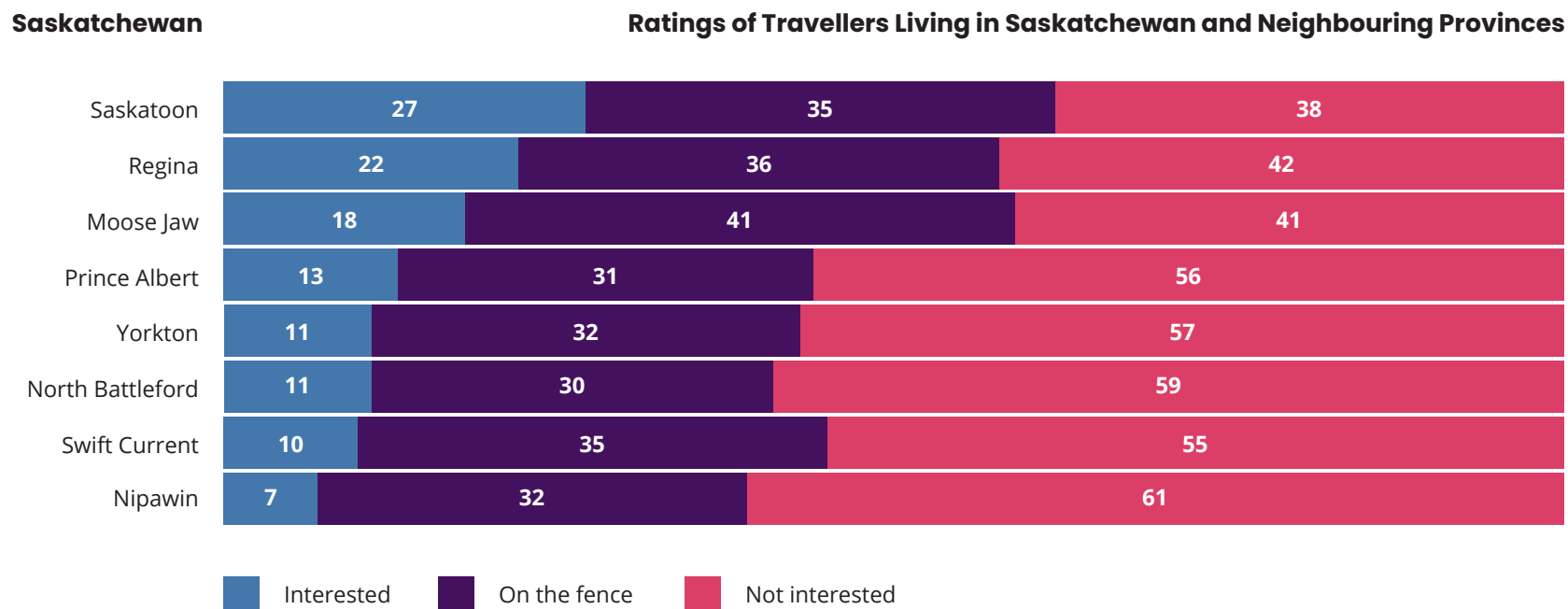
Interest is highest in visiting well-known Rockies destinations in Alberta.



Base All administered (n=678)

Q23. Here are some destinations that you might choose to travel to within your own province/territory and neighbouring provinces/territories. For each one, please indicate how interested, if at all, you would be in travelling there for leisure purposes.

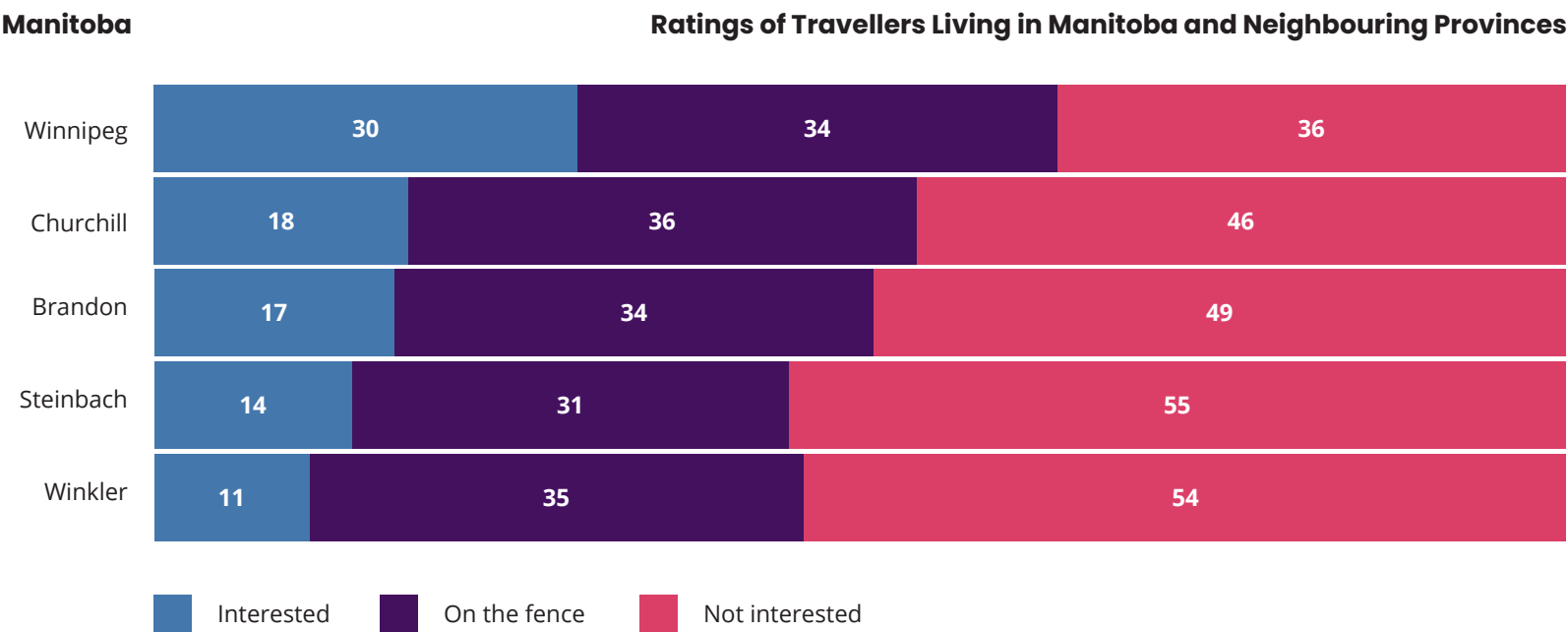
Modest level of interest in most Saskatchewan destinations, but around a quarter interested in Saskatoon and Regina.



Base All administered (n=365)

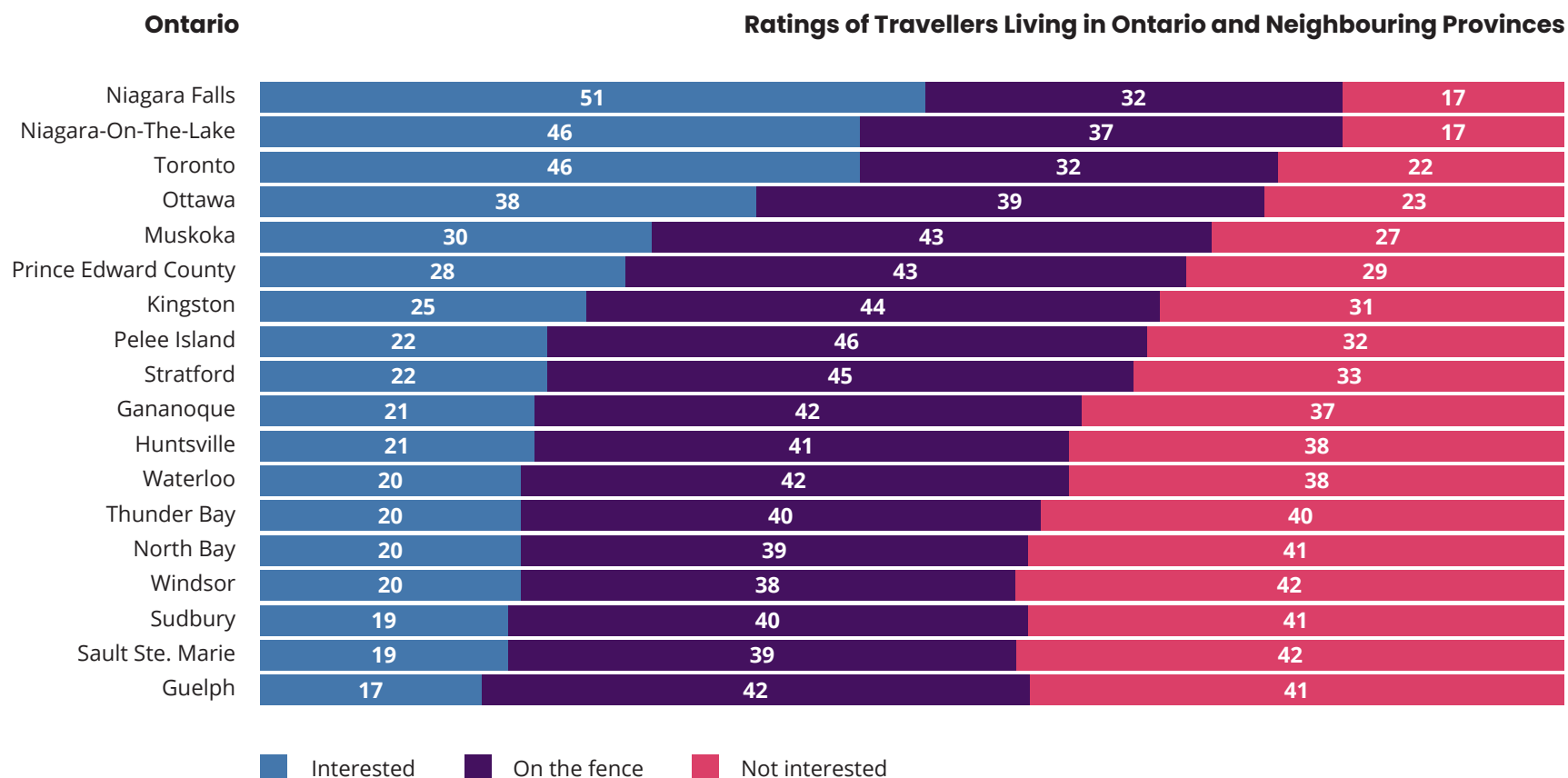
Q23. Here are some destinations that you might choose to travel to within your own province/territory and neighbouring provinces/territories. For each one, please indicate how interested, if at all, you would be in travelling there for leisure purposes.

Nearly one in three are interested in visiting Winnipeg, well ahead of other Manitoba destinations.



Base All administered (n=365)
Q23. Here are some destinations that you might choose to travel to within your own province/territory and neighbouring provinces/territories. For each one, please indicate how interested, if at all, you would be in travelling there for leisure purposes.

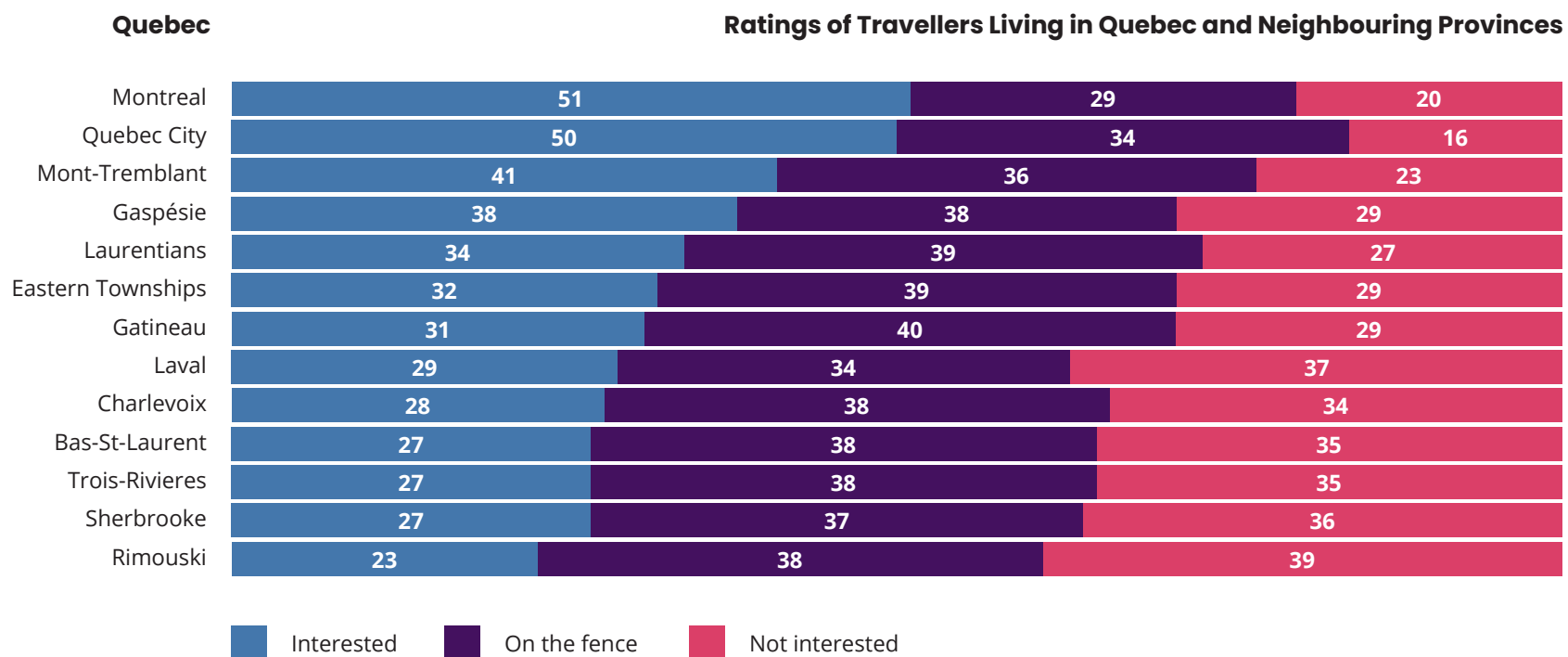
At least one in five interested in visiting most destinations in Ontario.



Base All administered (n=843)

Q23. Here are some destinations that you might choose to travel to within your own province/territory and neighbouring provinces/territories. For each one, please indicate how interested, if at all, you would be in travelling there for leisure purposes.

Significant interest in all Quebec destinations, reaching 50% for Montreal and Quebec City.



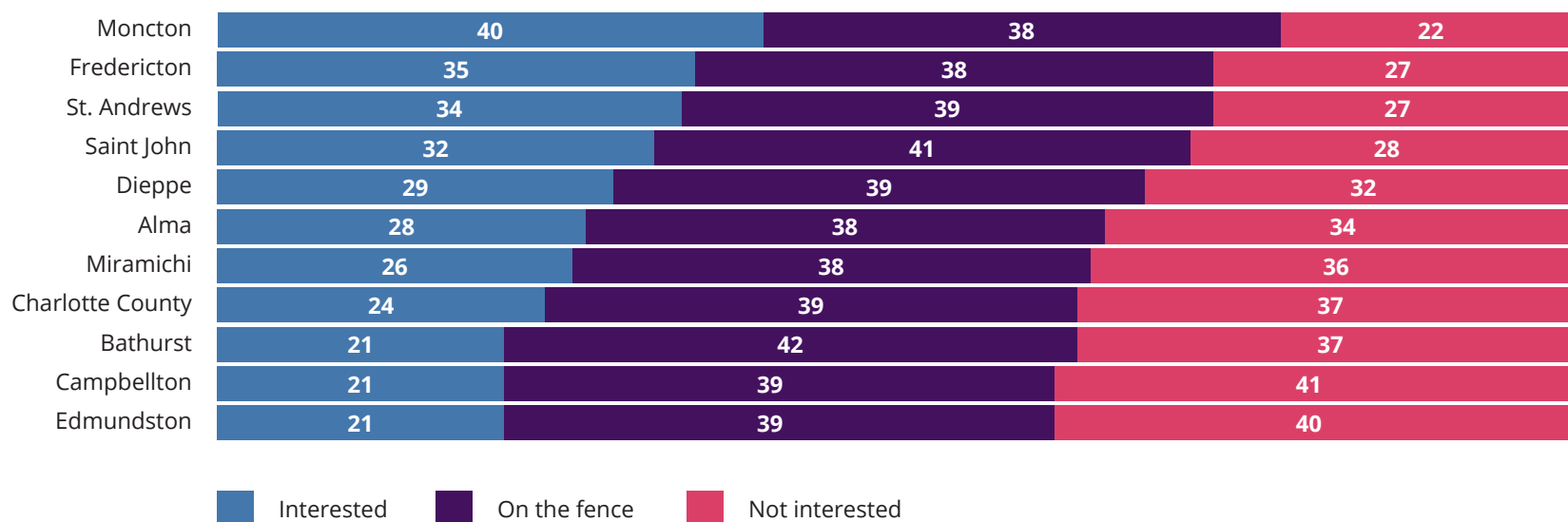
Base All administered (n=732)

Q23. Here are some destinations that you might choose to travel to within your own province/territory and neighbouring provinces/territories. For each one, please indicate how interested, if at all, you would be in travelling there for leisure purposes.

Moncton and Fredericton seen as top destinations in New Brunswick, but interest high across province.

New Brunswick

Ratings of Travellers Living in New Brunswick and Neighbouring Provinces



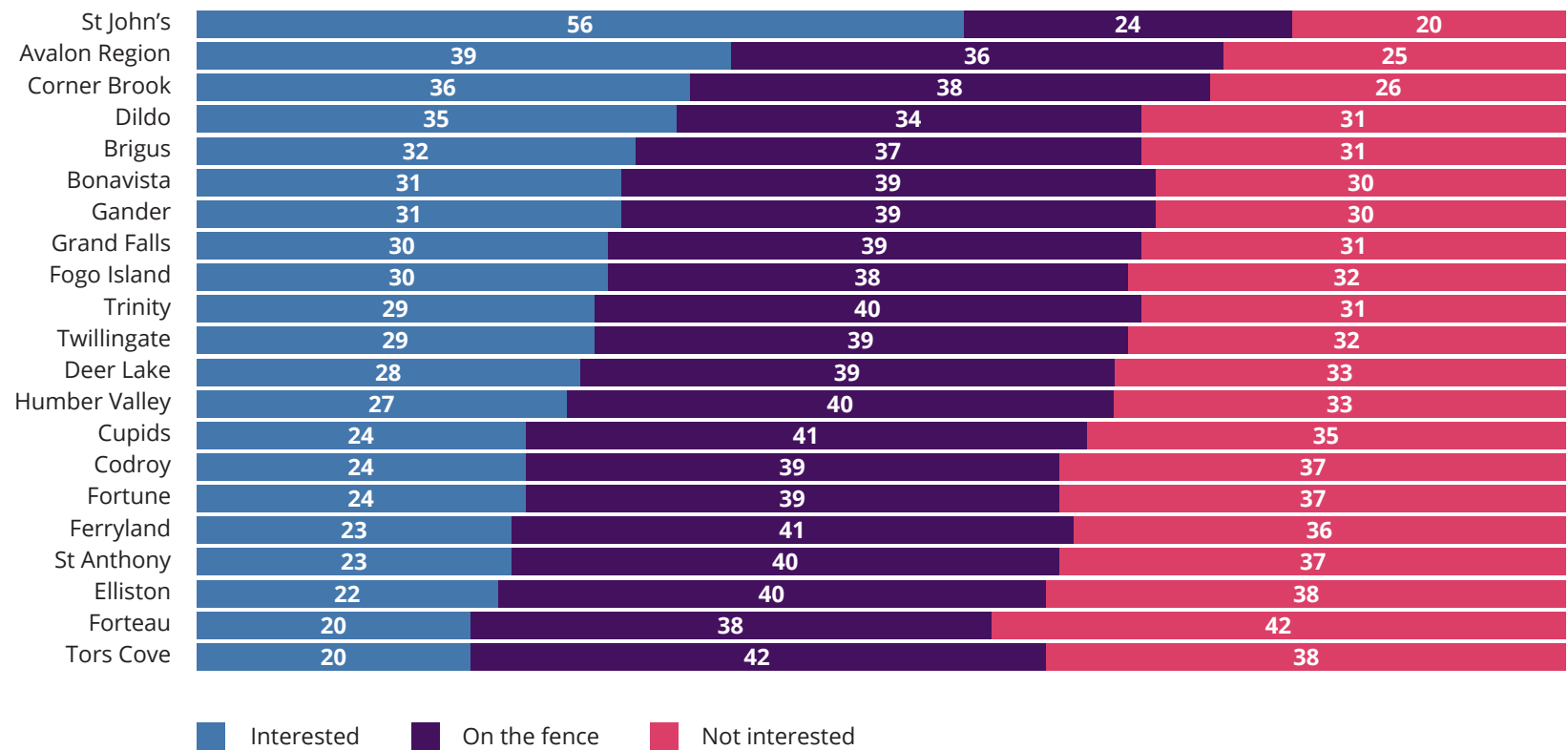
Base All administered (n=449)

Q23. Here are some destinations that you might choose to travel to within your own province/territory and neighbouring provinces/territories. For each one, please indicate how interested, if at all, you would be in travelling there for leisure purposes.

St John's is clearly seen as top Newfoundland and Labrador destination, but other destinations also interest large minorities.

Newfoundland and Labrador

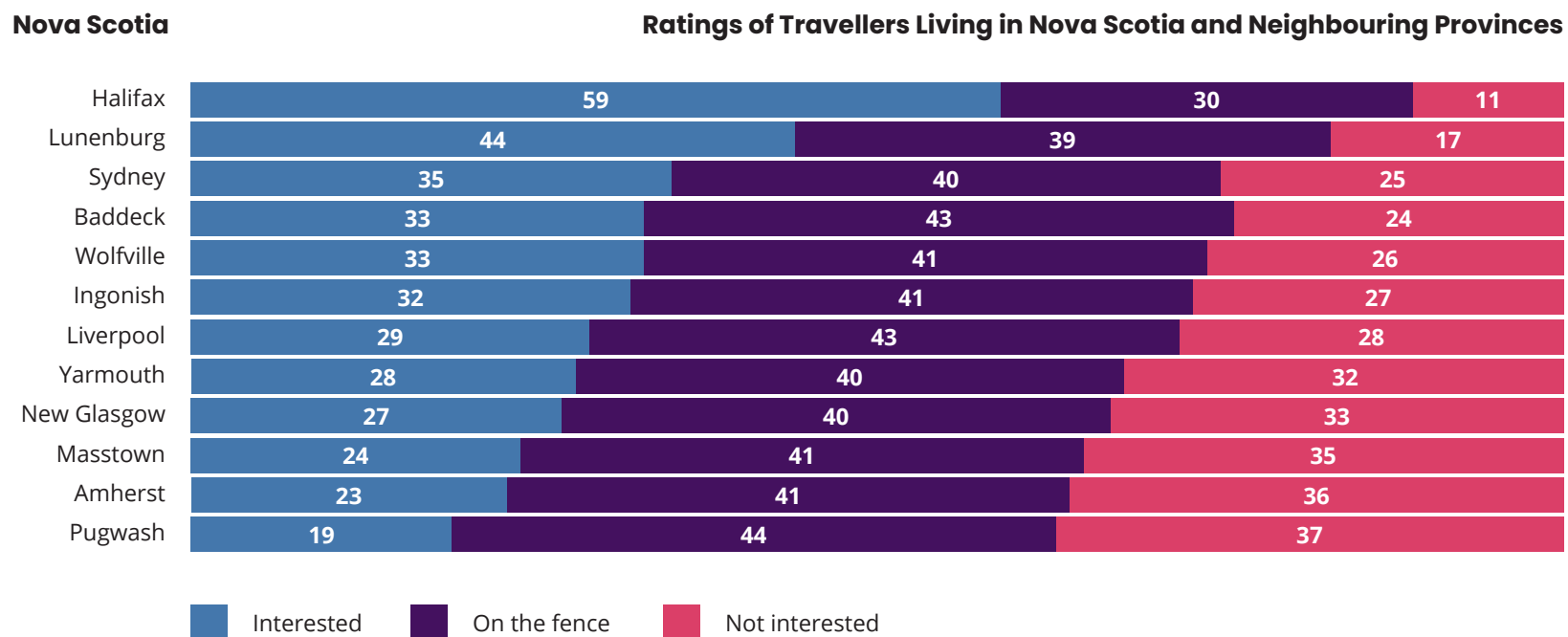
Ratings of Travellers Living in Newfoundland and Labrador and Neighbouring Provinces



Base All administered (n=270)

Q23. Here are some destinations that you might choose to travel to within your own province/territory and neighbouring provinces/territories. For each one, please indicate how interested, if at all, you would be in travelling there for leisure purposes.

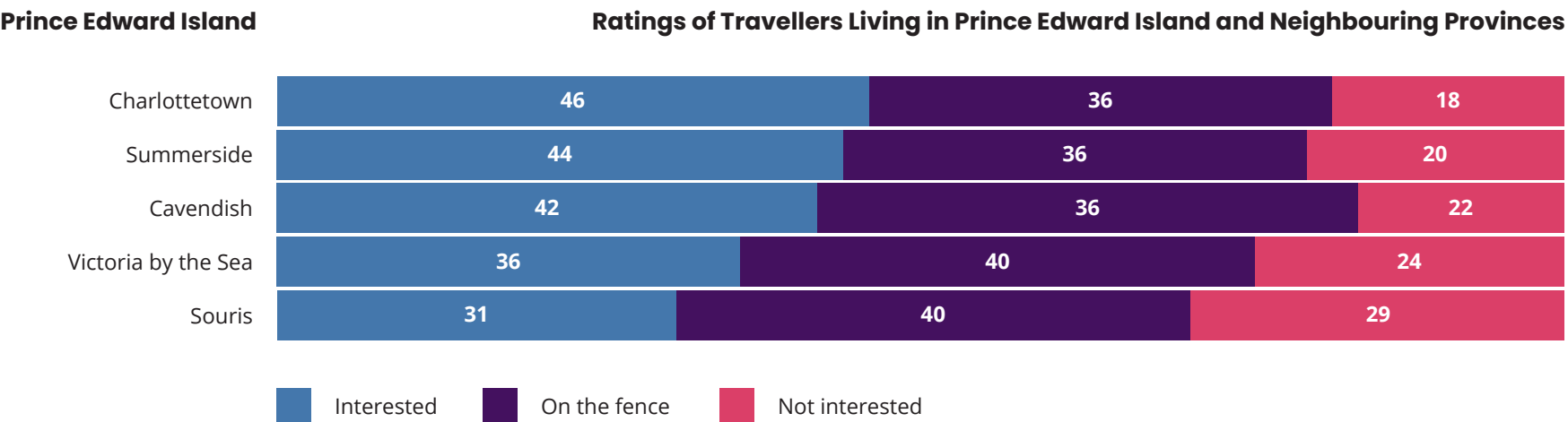
Halifax appeals to nearly three in five travellers, with high interest in several other destinations in Nova Scotia.



Base All administered (n=289)

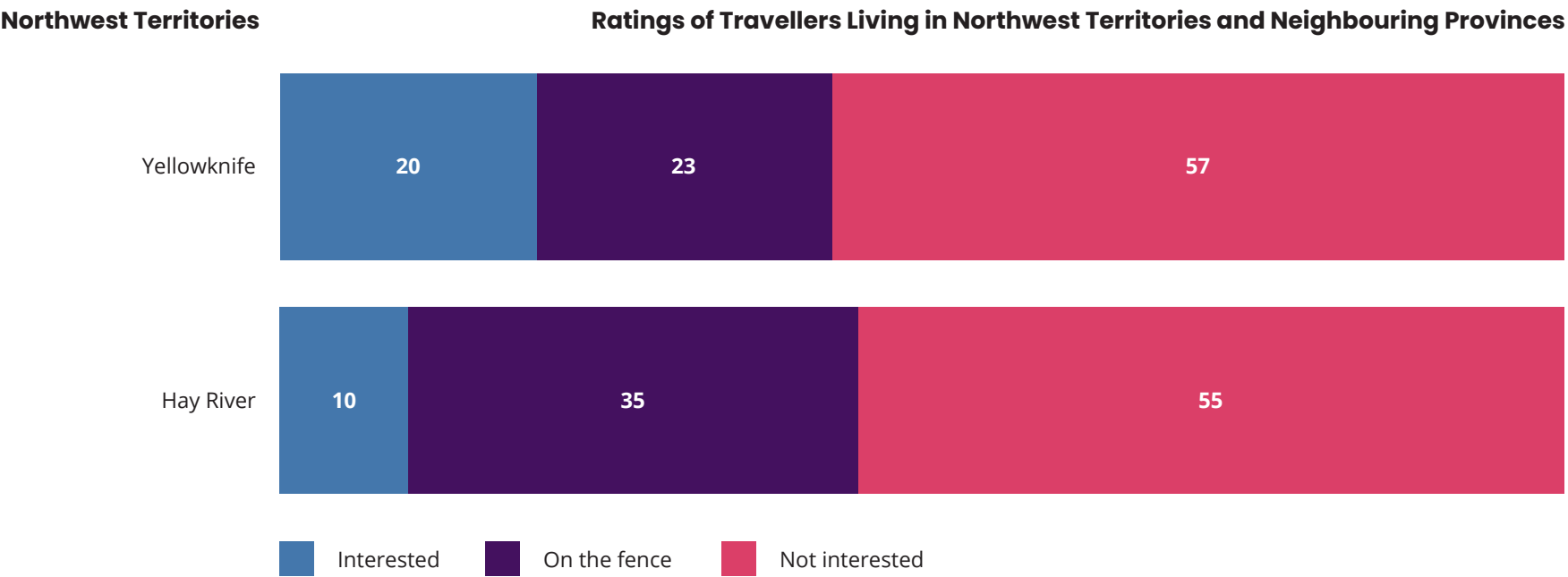
Q23. Here are some destinations that you might choose to travel to within your own province/territory and neighbouring provinces/territories. For each one, please indicate how interested, if at all, you would be in travelling there for leisure purposes.

Between one third and a half interested in visiting all Prince Edward Island destinations.



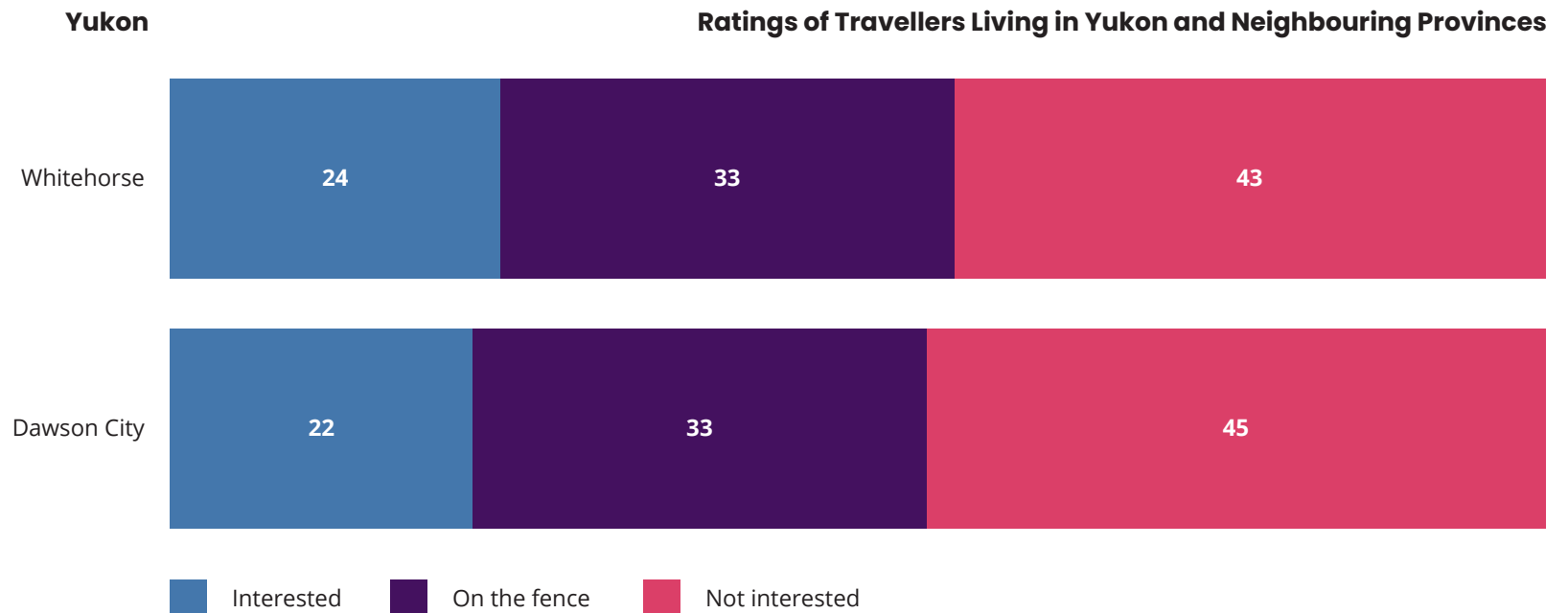
Base All administered (n=202)
Q23. Here are some destinations that you might choose to travel to within your own province/territory and neighbouring provinces/territories. For each one, please indicate how interested, if at all, you would be in travelling there for leisure purposes.

Modest level of interest in Northwest Territories urban centres.



Base All administered (n=142)
Q23. Here are some destinations that you might choose to travel to within your own province/territory and neighbouring provinces/territories. For each one, please indicate how interested, if at all, you would be in travelling there for leisure purposes.

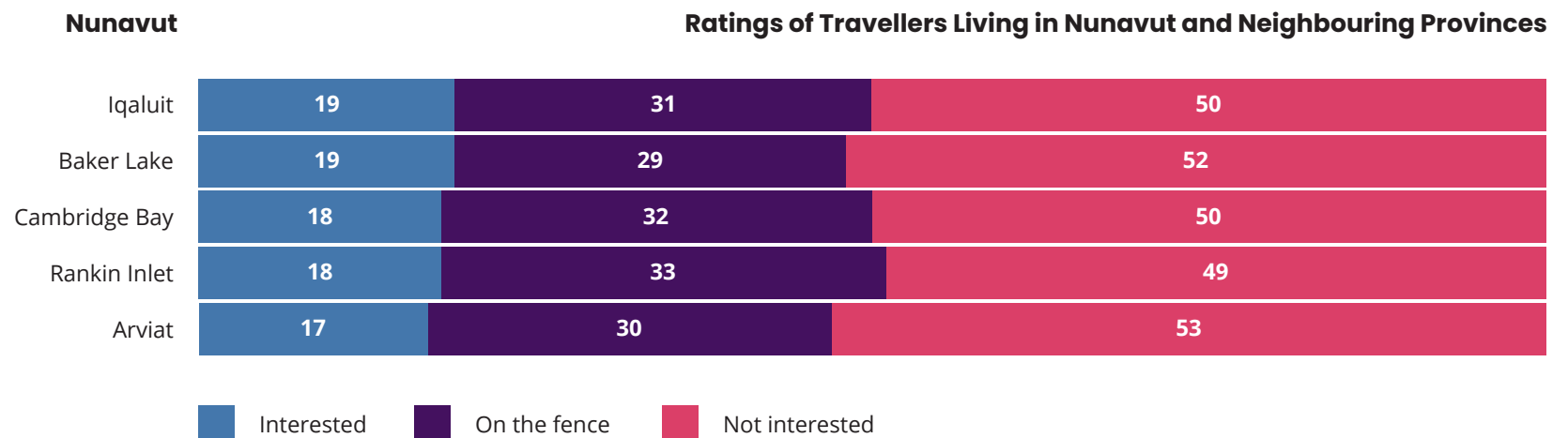
Similar levels of interest – just under a quarter – in travel to Whitehorse and Dawson City.



Base All administered (n=206)

Q23. Here are some destinations that you might choose to travel to within your own province/territory and neighbouring provinces/territories. For each one, please indicate how interested, if at all, you would be in travelling there for leisure purposes.

Little differentiation in interest between Nunavut destinations suggests low awareness.



Base All administered (n=370)

Q23. Here are some destinations that you might choose to travel to within your own province/territory and neighbouring provinces/territories. For each one, please indicate how interested, if at all, you would be in travelling there for leisure purposes.

March 2021

Awareness and Interest in Tourism Attractions in Each Province/Territory

A National Survey of Canadian Travel Consumers

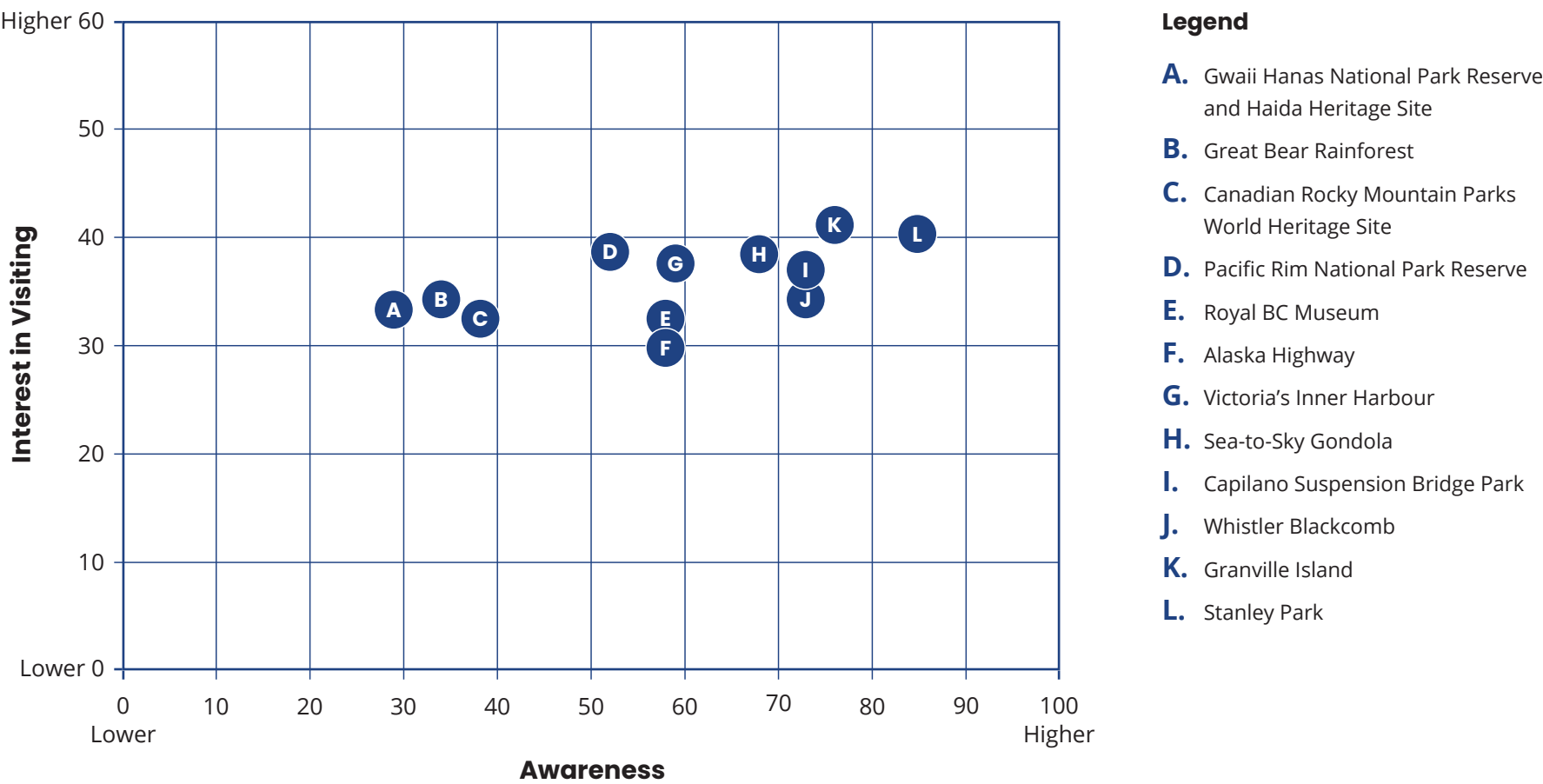


Findings Snapshot

- Key Vancouver attractions have highest profile and appeal within British Columbia.
- Rockies natural parks are standout attractions in Alberta, but Calgary Zoo also appeals.
- Most Saskatchewan attractions have not yet cut through to public awareness.
- Profile of Manitoba attractions is modest, but highest for natural parks and cultural attractions.
- Niagara Falls is the marquee Ontario attraction, but 1000 Islands and Algonquin Park also appeal.
- Old quarters of Montreal and Québec have the edge over other Québec attractions in profile and appeal.
- Bay of Fundy attractions are the clear standout in New Brunswick.
- Gros Morne and Signal Hill have the highest profile and greatest appeal in Newfoundland and Labrador.
- Cape Breton and historical attractions are positively viewed within Nova Scotia.
- The Confederation Bridge and Green Gables have highest profile in Prince Edward Island.
- Wood Buffalo and Great Slave Lake have highest awareness in Northwest Territories, but little differentiation in awareness.
- Little differentiation in profile or appeal suggests that Yukon attractions are largely unknown.
- Northwest Passage is only Nunavut attraction that has cut through to public awareness.

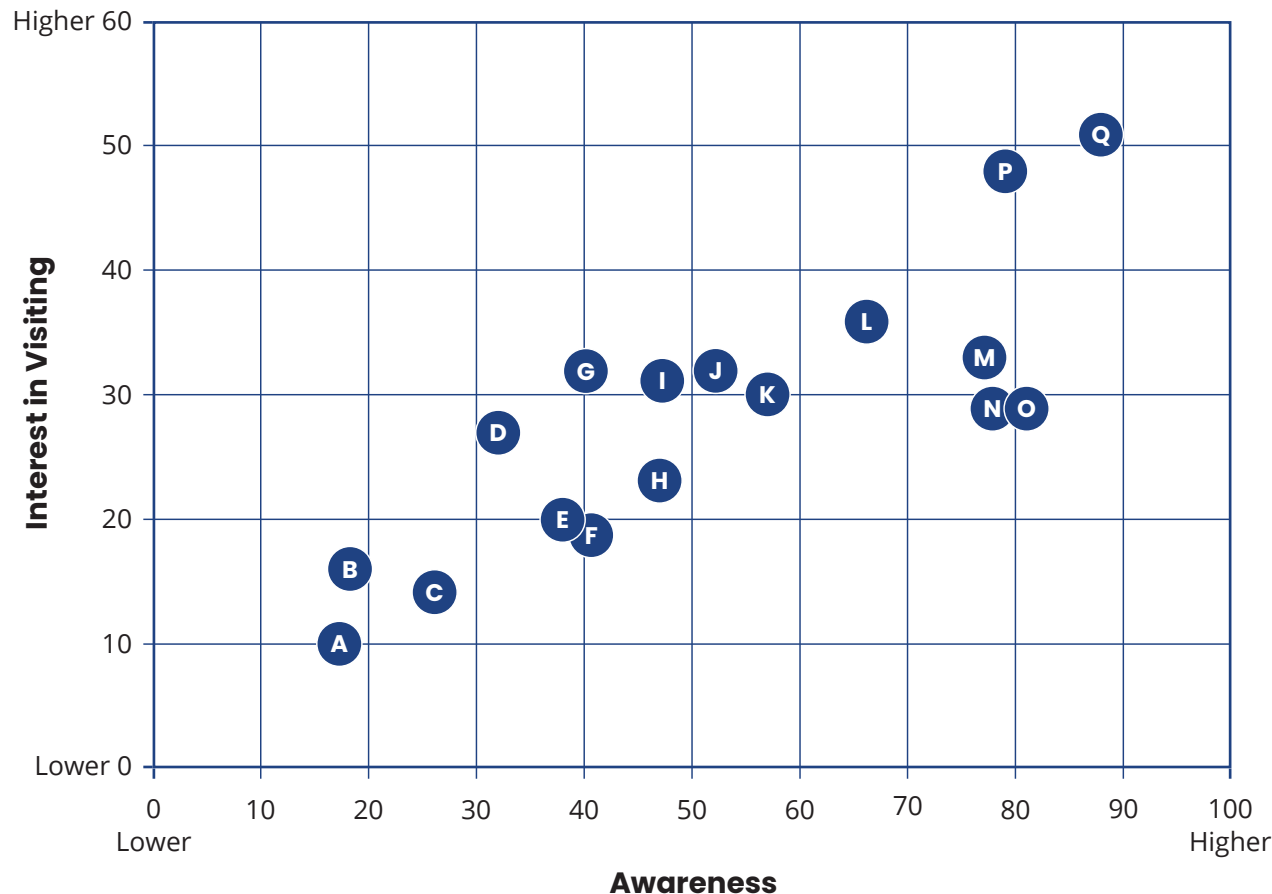


Key Vancouver attractions have highest profile and appeal within British Columbia.



Base All administered / respondents (n=511 / 532)
Q24. Here are some visitor attractions that you might choose to visit within your own province/territory and neighbouring provinces/territories. Before this survey, which of these attractions had you heard of?
Q25. And how interested, if at all, are you in visiting each of these attractions?

Rockies natural parks are standout attractions in Alberta, but Calgary Zoo also appeals.



Legend

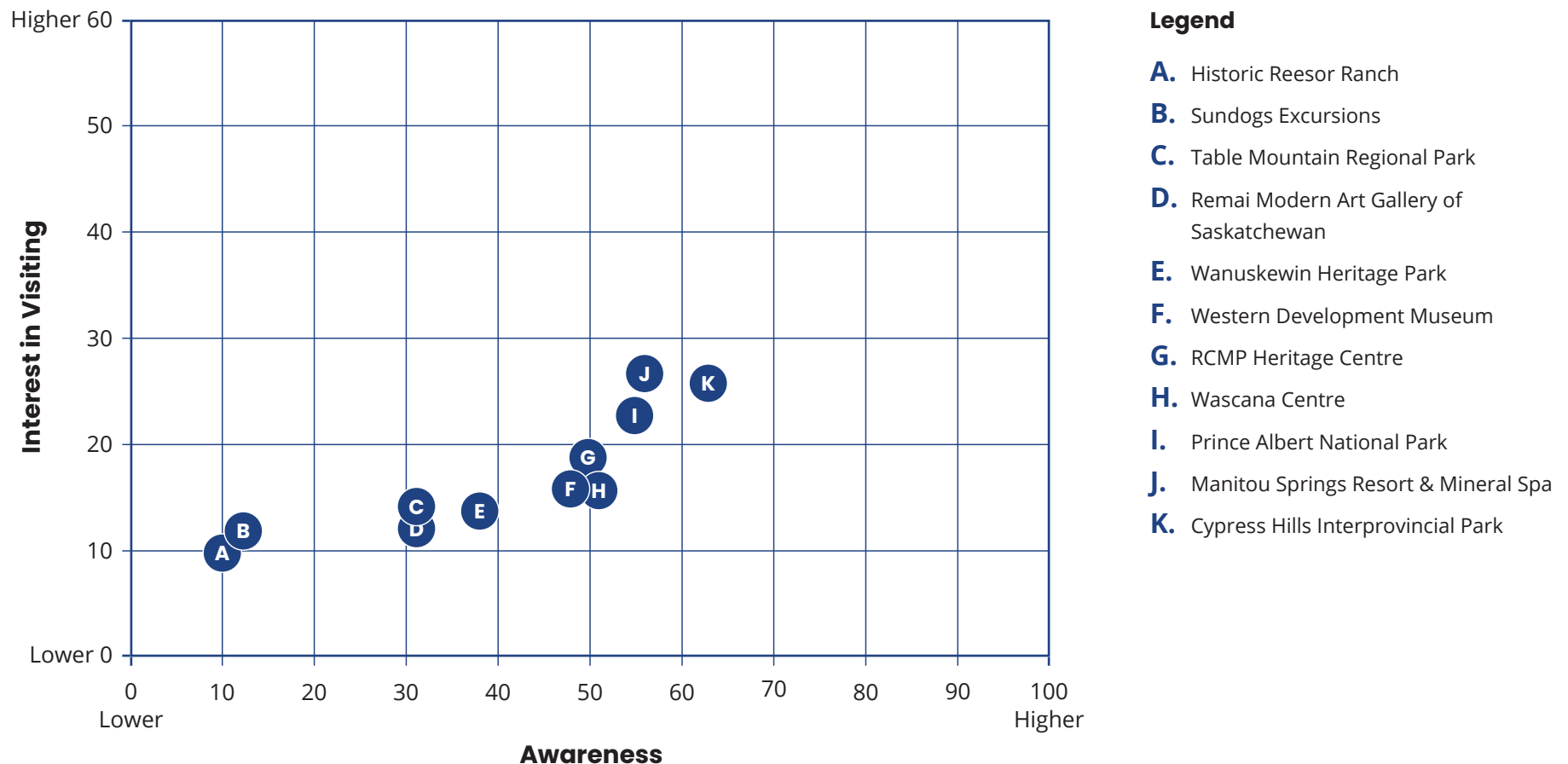
- A.** WinSport
- B.** National Music Centre
- C.** Art Gallery of Alberta
- D.** Glacier Discovery Centre
- E.** Canmore Nordic Centre
- F.** Edmonton River Valley
- G.** Rocky Mountaineer Rail Journey
- H.** Elk Island National Park
- I.** Glacier Skywalk
- J.** Waterton Lakes National Park
- K.** Royal Tyrrell Museum
- L.** Fairmont Chateau Lake Louise
- M.** Calgary Zoo
- N.** Calgary Stampede
- O.** West Edmonton Mall
- P.** Jasper National Park
- Q.** Banff National Park

Base All administered / respondents (n=646 / 678)

Q24. Here are some visitor attractions that you might choose to visit within your own province/territory and neighbouring provinces/territories. Before this survey, which of these attractions had you heard of?

Q25. And how interested, if at all, are you in visiting each of these attractions?

Most Saskatchewan attractions have not yet cut through to public awareness.

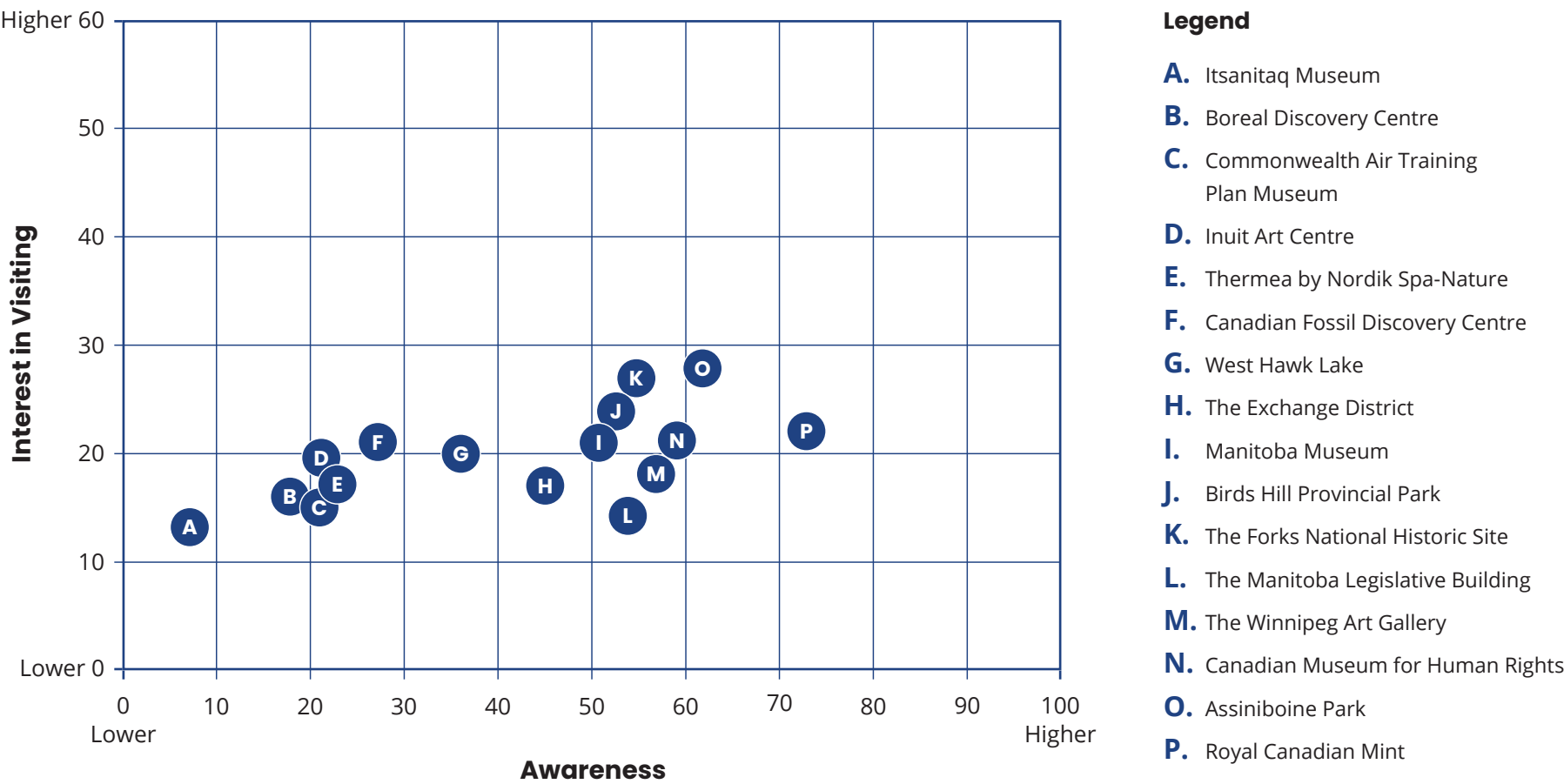


Base All administered / respondents (n=263 / 365)

Q24. Here are some visitor attractions that you might choose to visit within your own province/territory and neighbouring provinces/territories. Before this survey, which of these attractions had you heard of?

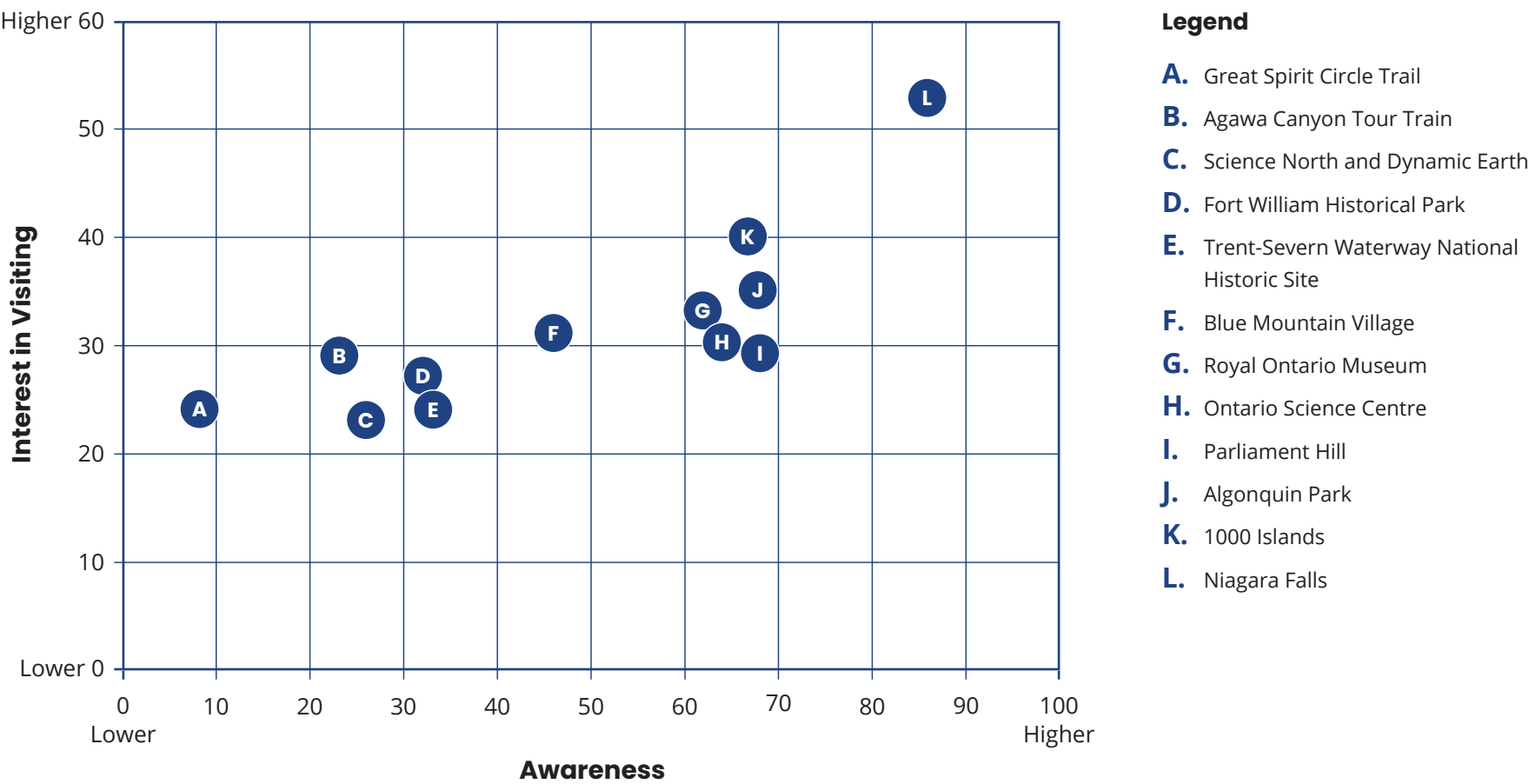
Q25. And how interested, if at all, are you in visiting each of these attractions?

Profile of Manitoba attractions is modest, but highest for natural parks and cultural attractions.



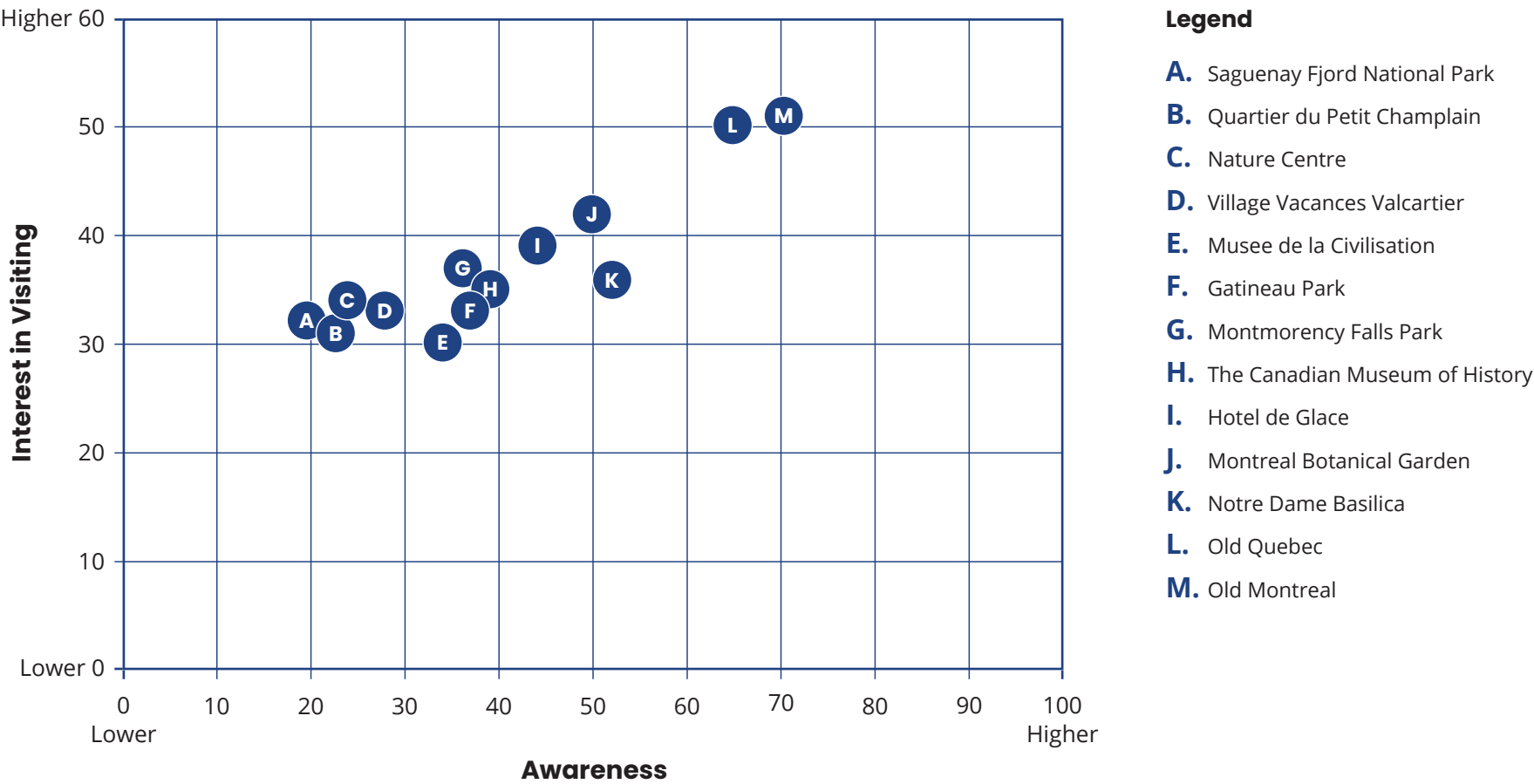
Base All administered / respondents (n=291 / 422)
Q24. Here are some visitor attractions that you might choose to visit within your own province/territory and neighbouring provinces/territories. Before this survey, which of these attractions had you heard of?
Q25. And how interested, if at all, are you in visiting each of these attractions?

Niagara Falls is the marquee Ontario attraction, but 1000 Islands and Algonquin Park also appeal.



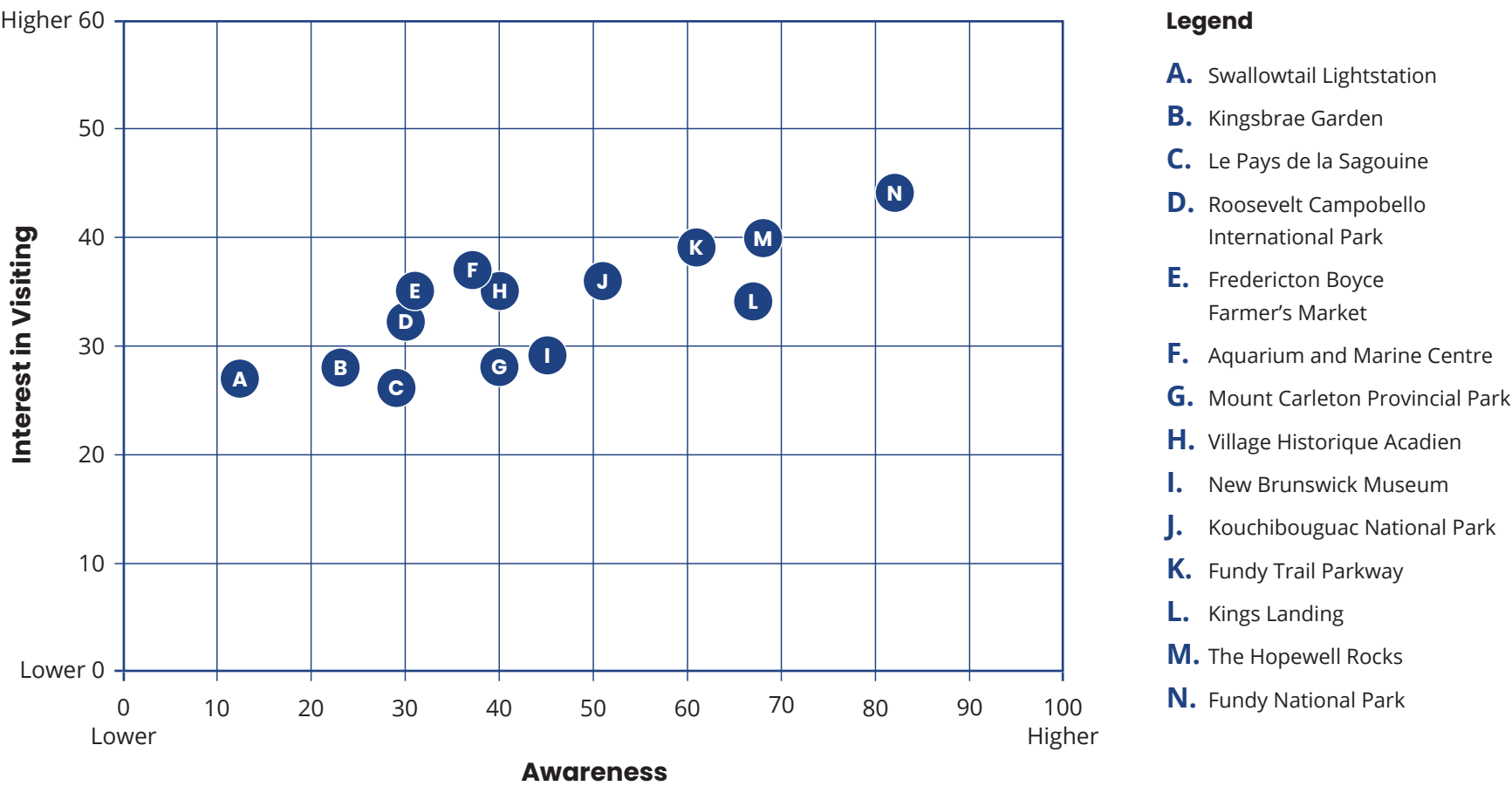
Base All administered / respondents (n=806 / 843)
Q24. Here are some visitor attractions that you might choose to visit within your own province/territory and neighbouring provinces/territories. Before this survey, which of these attractions had you heard of?
Q25. And how interested, if at all, are you in visiting each of these attractions?

Old quarters of Montreal and Québec have the edge over other Québec attractions in profile and appeal.



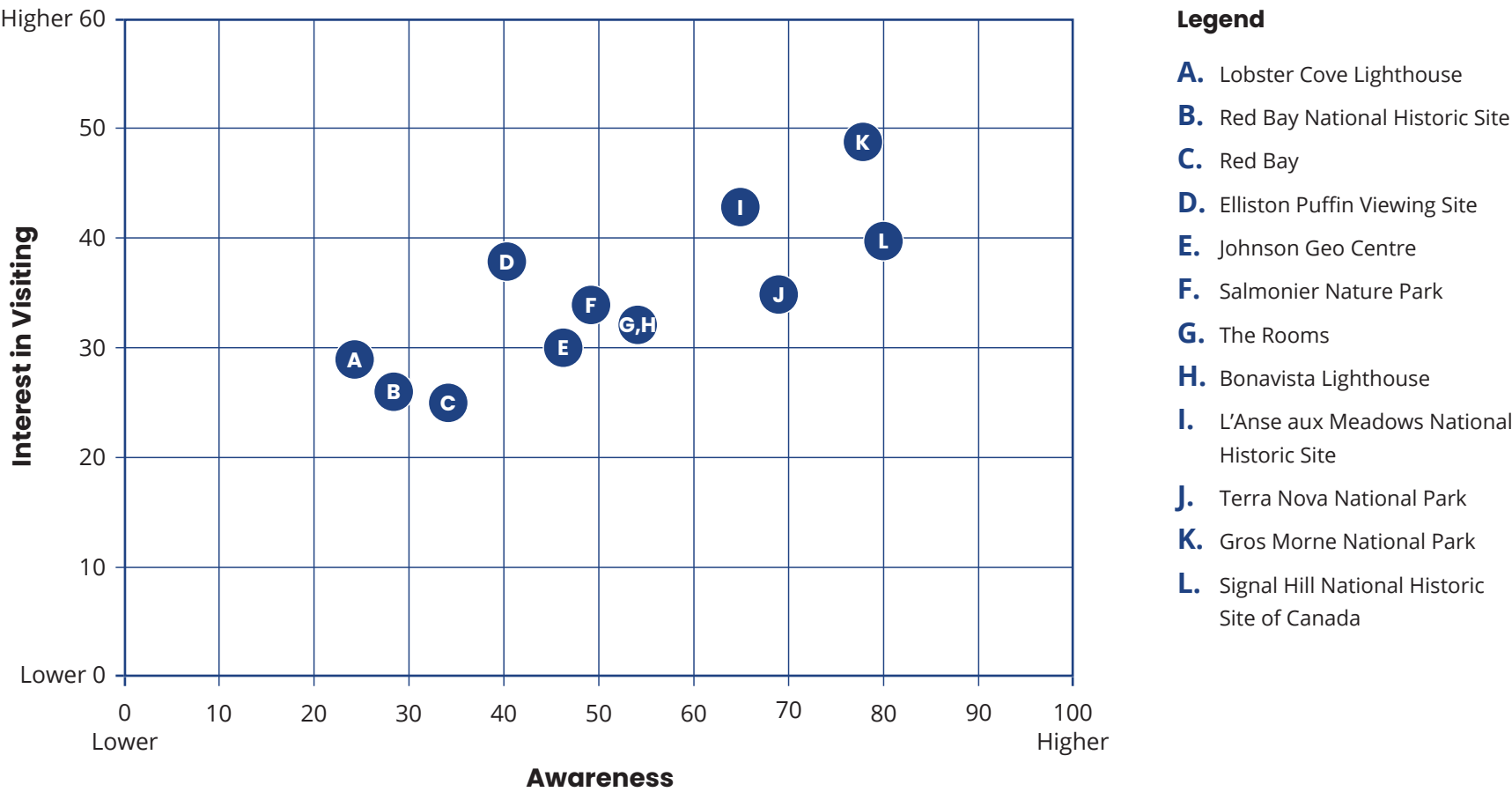
Base All administered / respondents (n=680 / 732)
Q24. Here are some visitor attractions that you might choose to visit within your own province/territory and neighbouring provinces/territories. Before this survey, which of these attractions had you heard of?
Q25. And how interested, if at all, are you in visiting each of these attractions?

Bay of Fundy attractions are the clear standout in New Brunswick.



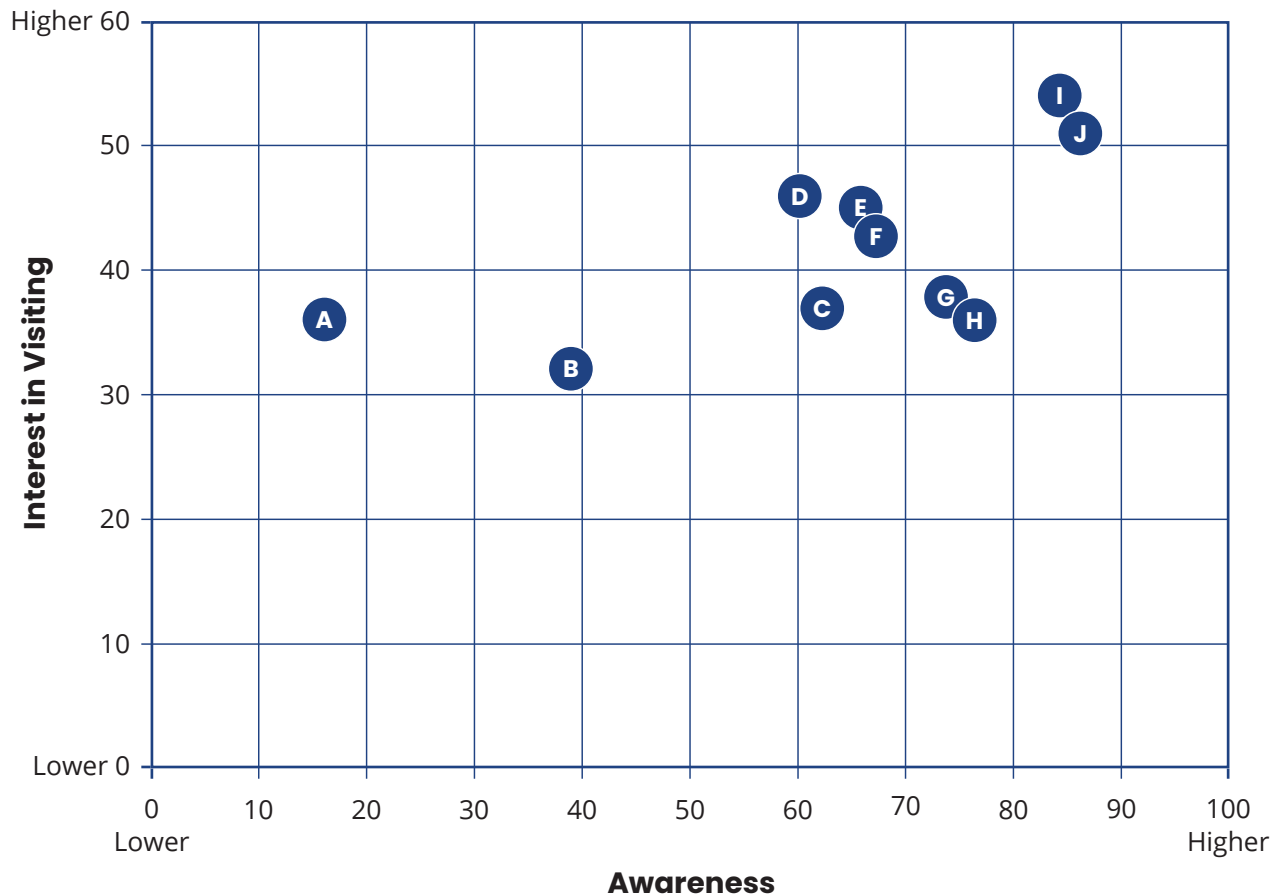
Base All administered / respondents (n=245 / 449)
Q24. Here are some visitor attractions that you might choose to visit within your own province/territory and neighbouring provinces/territories. Before this survey, which of these attractions had you heard of?
Q25. And how interested, if at all, are you in visiting each of these attractions?

Gros Morne and Signal Hill have the highest profile and greatest appeal in Newfoundland and Labrador.



Base All administered / respondents (n=220 / 270)
Q24. Here are some visitor attractions that you might choose to visit within your own province/territory and neighbouring provinces/territories. Before this survey, which of these attractions had you heard of?
Q25. And how interested, if at all, are you in visiting each of these attractions?

Cape Breton and historical attractions are positively viewed within Nova Scotia.



Legend

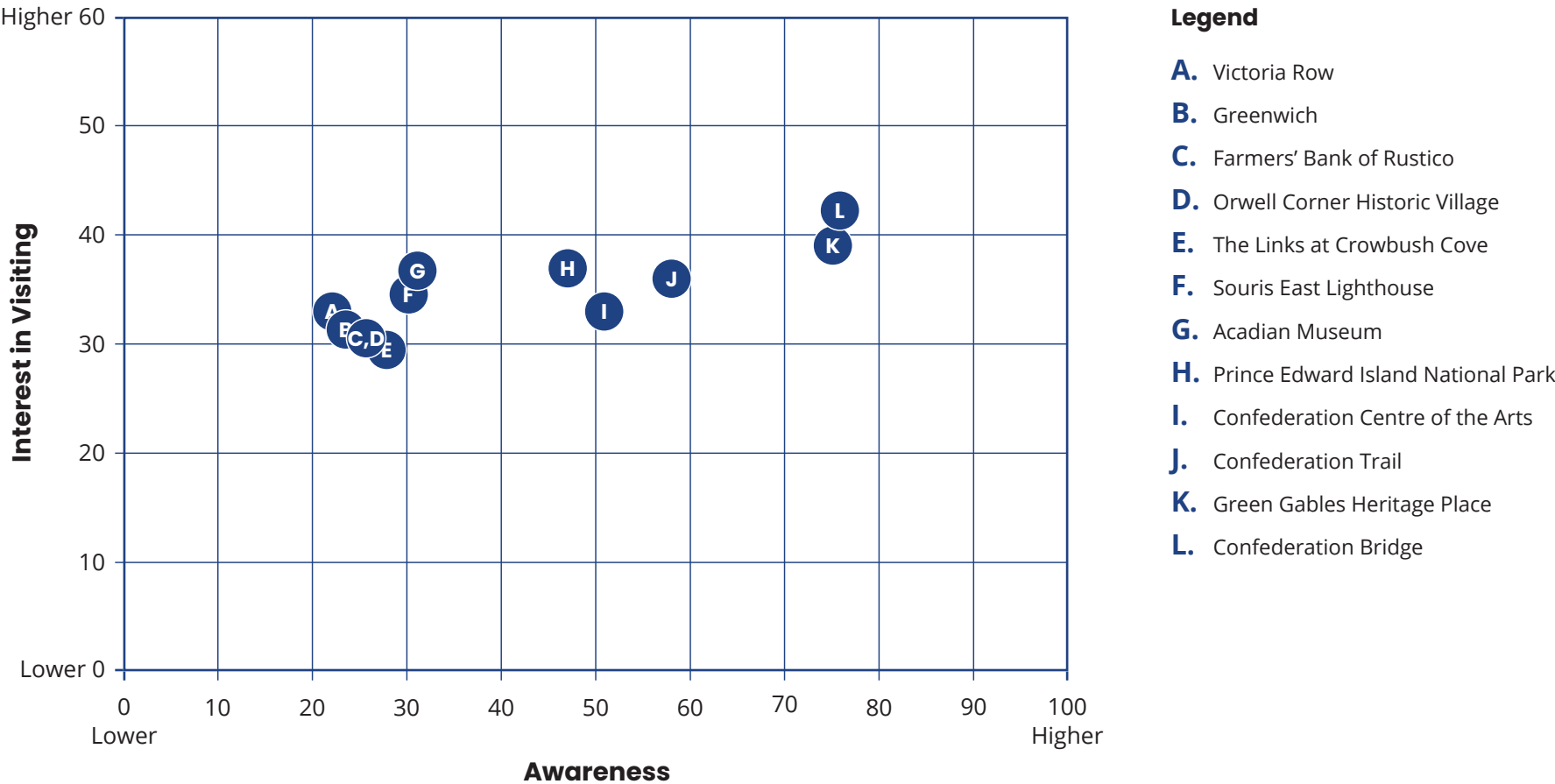
- A.** Deep Sky Eye Observatory
- B.** Grand Pre UNESCO World Heritage Site
- C.** Maritime Museum of the Atlantic
- D.** Old Town Lunenburg
- E.** Cape Breton Highlands National Park
- F.** Fortress of Louisbourg National Historic Site
- G.** Bluenose II
- H.** Halifax Citadel National Historic Site
- I.** The Cabot Trail
- J.** Peggy's Cove Lighthouse

Base All administered / respondents (n=270 / 289)

Q24. Here are some visitor attractions that you might choose to visit within your own province/territory and neighbouring provinces/territories. Before this survey, which of these attractions had you heard of?

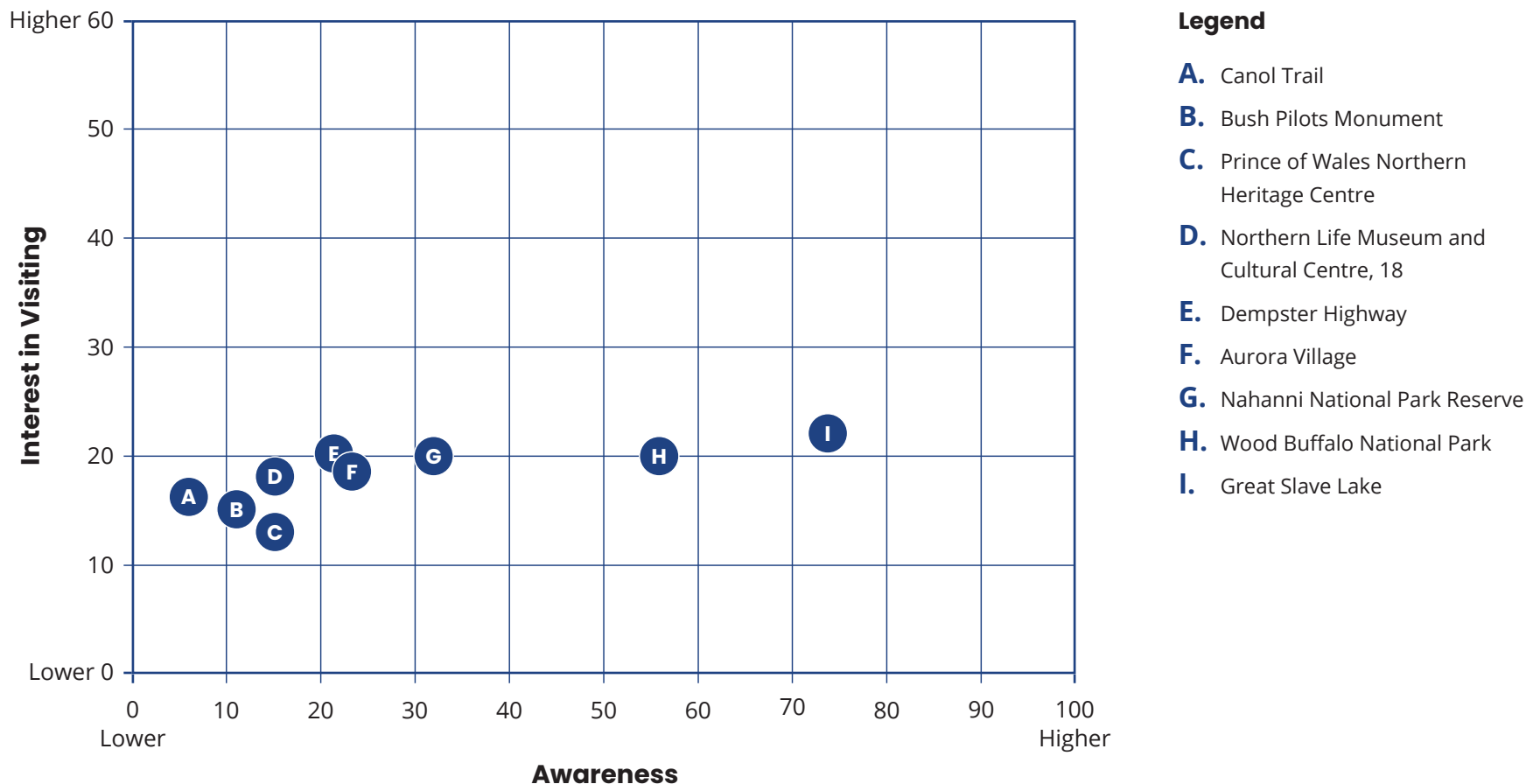
Q25. And how interested, if at all, are you in visiting each of these attractions?

The Confederation Bridge and Green Gables have highest profile in Prince Edward Island.



Base All administered / respondents (n=183 / 202)
Q24. Here are some visitor attractions that you might choose to visit within your own province/territory and neighbouring provinces/territories. Before this survey, which of these attractions had you heard of?
Q25. And how interested, if at all, are you in visiting each of these attractions?

Wood Buffalo and Great Slave Lake have highest awareness in Northwest Territories, but little differentiation in awareness.

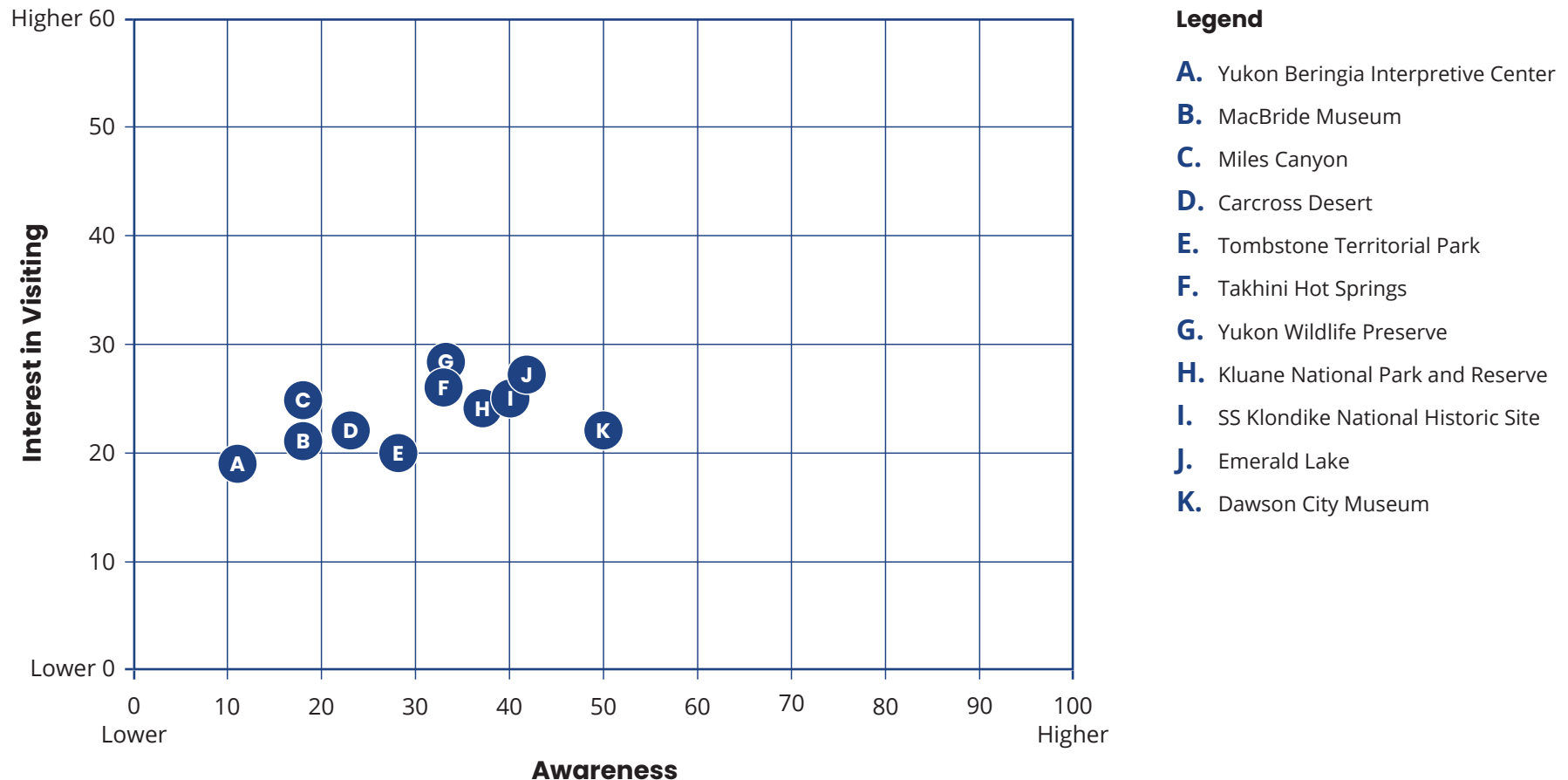


Base All administered / respondents (n=82 / 142)

Q24. Here are some visitor attractions that you might choose to visit within your own province/territory and neighbouring provinces/territories. Before this survey, which of these attractions had you heard of?

Q25. And how interested, if at all, are you in visiting each of these attractions?

Little differentiation in profile or appeal suggests that Yukon attractions are largely unknown.

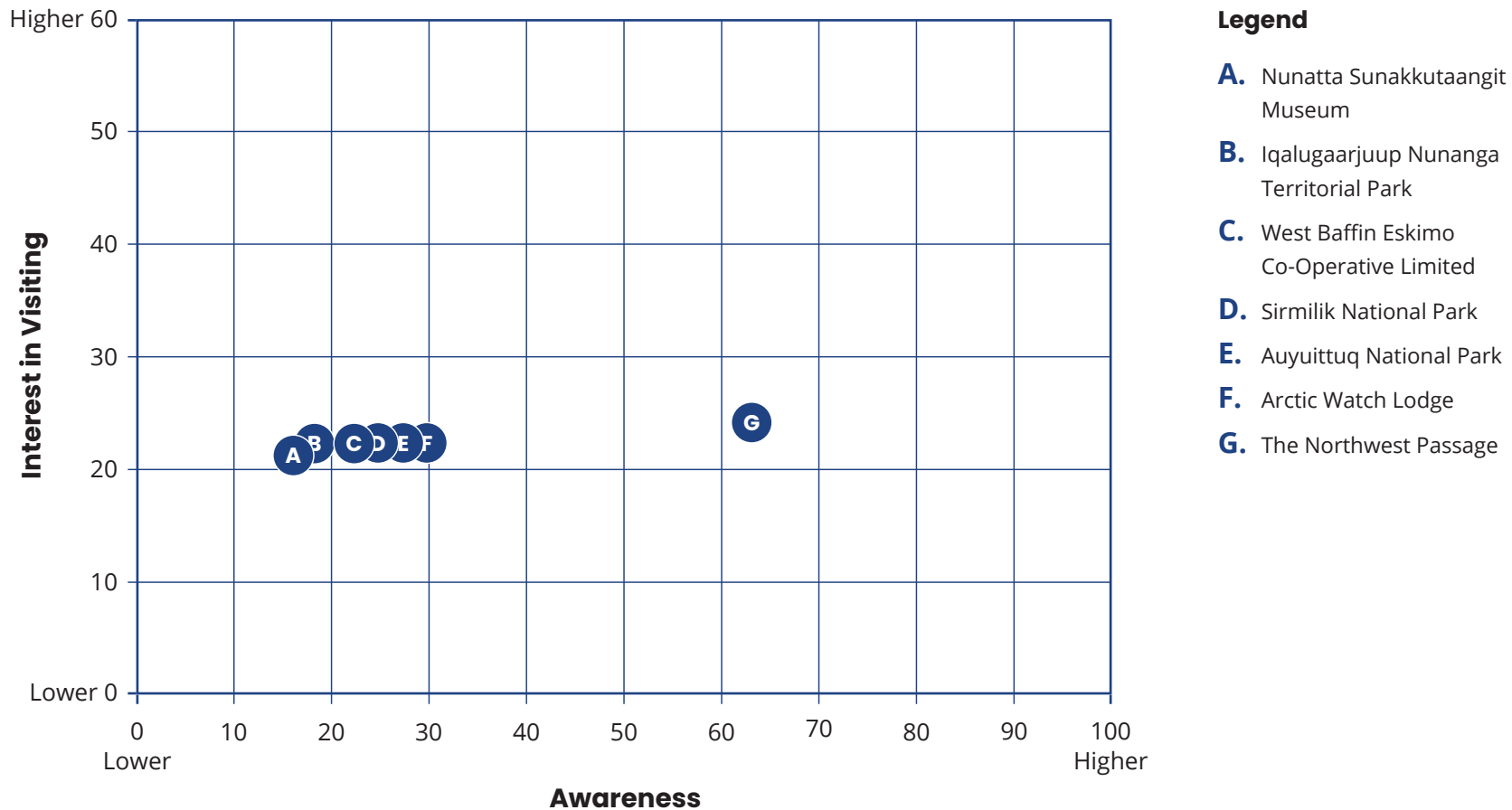


Base All administered / respondents (n=102 / 206)

Q24. Here are some visitor attractions that you might choose to visit within your own province/territory and neighbouring provinces/territories. Before this survey, which of these attractions had you heard of?

Q25. And how interested, if at all, are you in visiting each of these attractions?

Northwest Passage is only Nunavut attraction that has cut through to public awareness.



Base All administered / respondents (n=97 / 370)

Q24. Here are some visitor attractions that you might choose to visit within your own province/territory and neighbouring provinces/territories. Before this survey, which of these attractions had you heard of?

Q25. And how interested, if at all, are you in visiting each of these attractions?

March 2021

Day Trips in Home Region

A National Survey of Canadian Travel Consumers

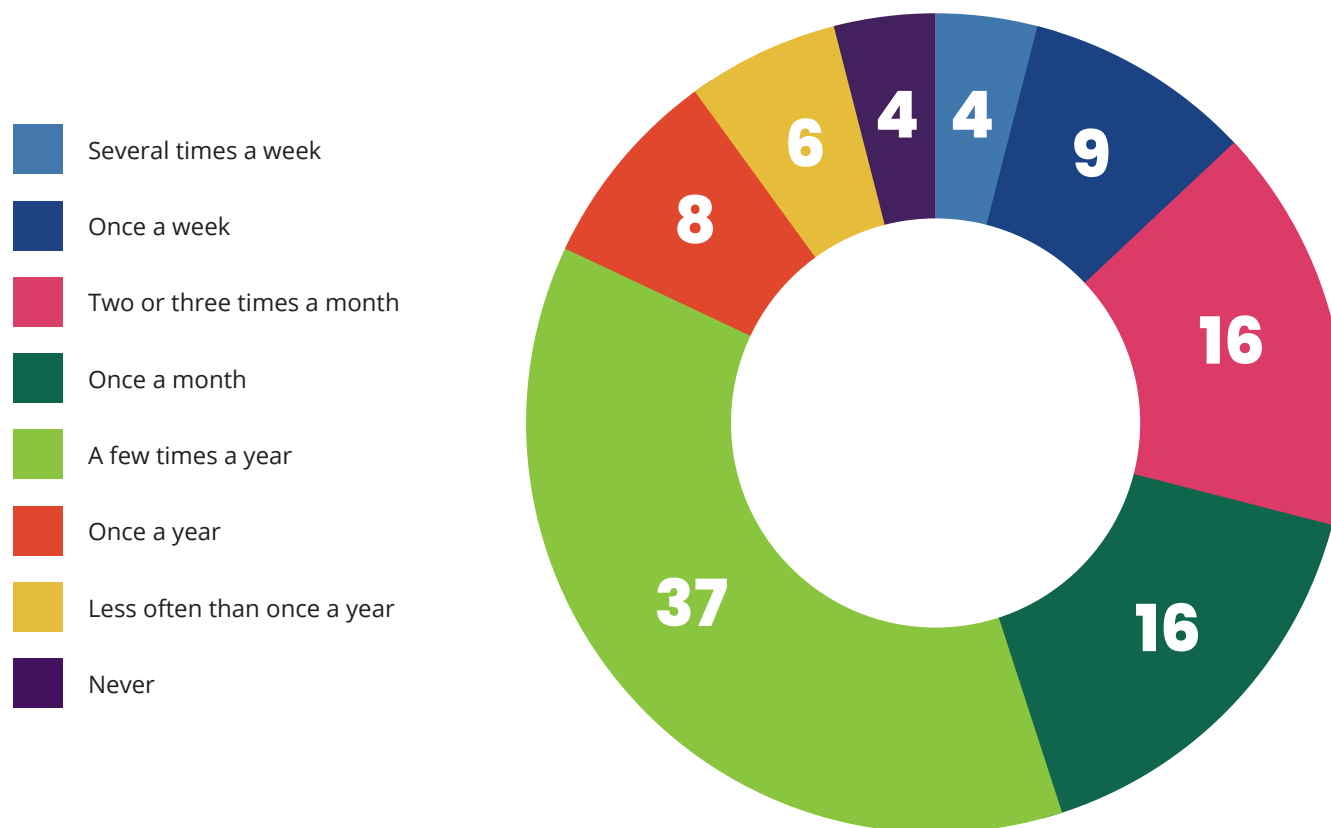


Findings Snapshot

- Nearly half (45%) are making day trips of 40+km for activities related to daily life at least once a month.
- Shopping is dominant reason for day trips; more than one in three regularly combine them with leisure activities.
- Shopping is primary reason for day trips – primarily for groceries, with household goods and home improvement as secondary reasons.



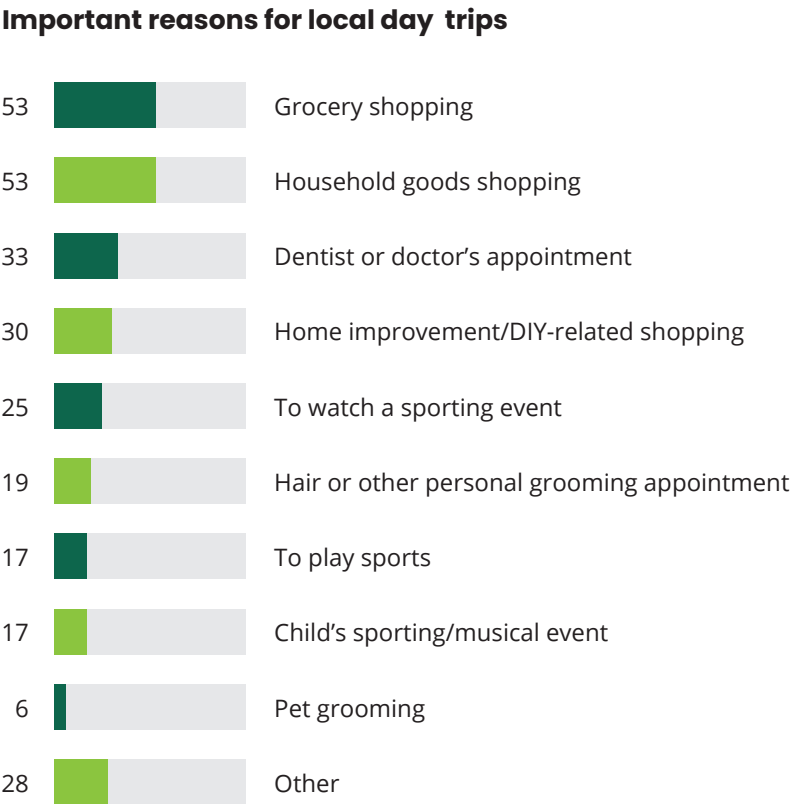
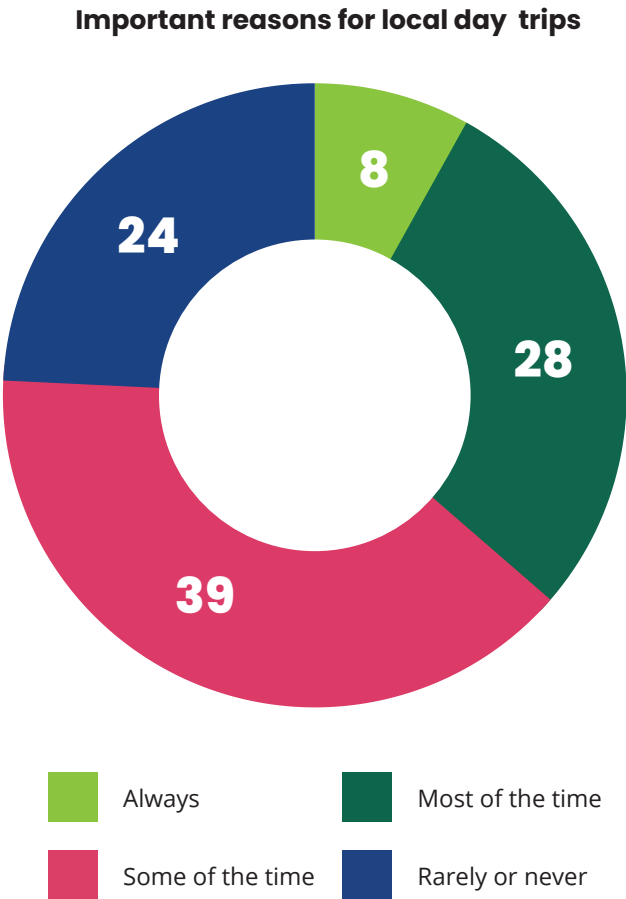
Nearly half (45%) are making day trips of 40+km for activities related to daily life at least once a month.



Base All respondents (n=2750)

Q18. Before the COVID-19 pandemic, how often, if at all, would you say you travelled to destinations at least 40km from where you live for activities related to your daily life, without staying overnight?

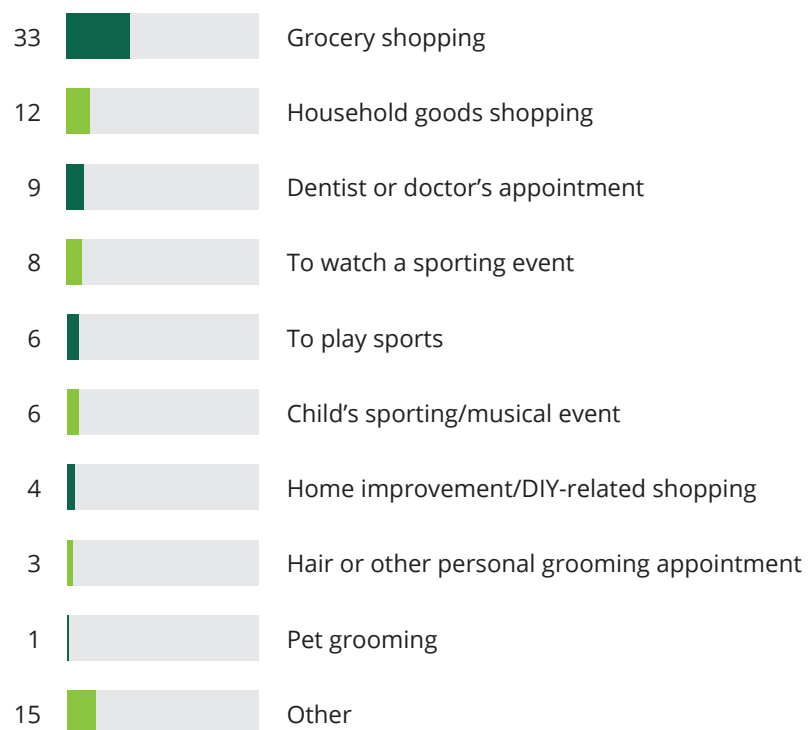
Shopping is dominant reason for day trips; more than one in three regularly combine them with leisure activities.



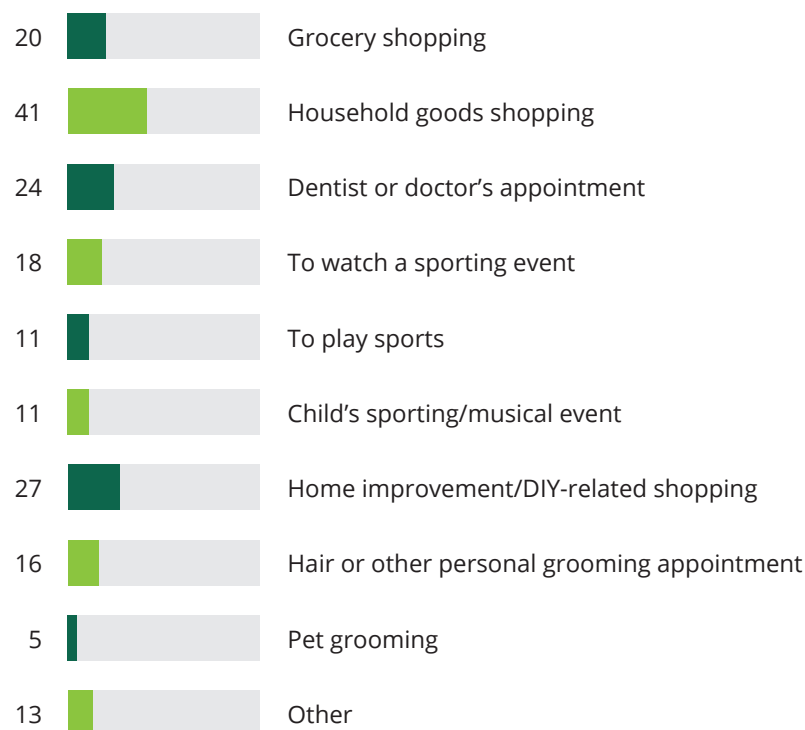
Base All respondents/ administered (n=2750/2633)
Q19. Before the COVID-19 pandemic, thinking about the most recent day trips you have made of at least 40km for activities related to your daily life, what were the most important reasons for those trips?
Q20. And before the COVID-19 pandemic, on these day trips to destinations at least 40km away, how often did you take the opportunity to take part in leisure activities such as visiting a museum, park, historic site, cultural venue or other leisure attraction at your destination during your visit?

Shopping is primary reason for day trips – primarily for groceries, with household goods and home improvement as secondary reasons.

Most Important Reason



Other Reasons



Base All respondents (n=2750)

Q19. Before the COVID-19 pandemic, thinking about the most recent day trips you have made of at least 40km for activities related to your daily life, what were the most important reasons for those trips?

March 2021

Remote Living and Working

A National Survey of Canadian Travel Consumers



Findings Snapshot

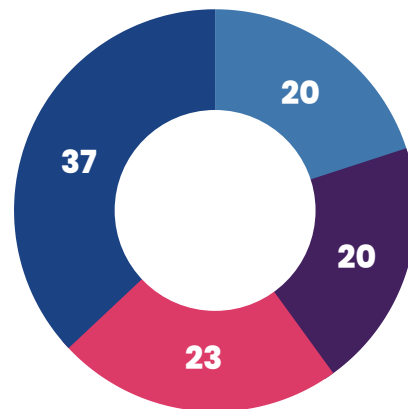
- Numbers working mostly remotely have nearly doubled since COVID-19 – but over half still never do.
- Nearly half of Canadians are interested in remote living/working temporarily, with one in four naming British Columbia as their preferred location.
- Attractive scenery, internet access and proximity to family/friends are key location factors.
- Professional services, healthcare and construction workers are well represented among those interested in relocating to most popular provinces.



Numbers working mostly remotely have nearly doubled since COVID-19, but over half still never do.

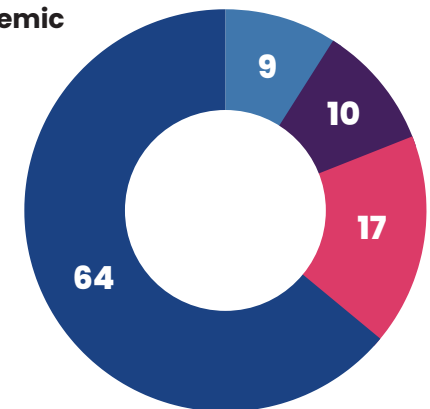
Self

- I always work remotely
- I frequently work remotely
- I occasionally work remotely
- I cannot work remotely



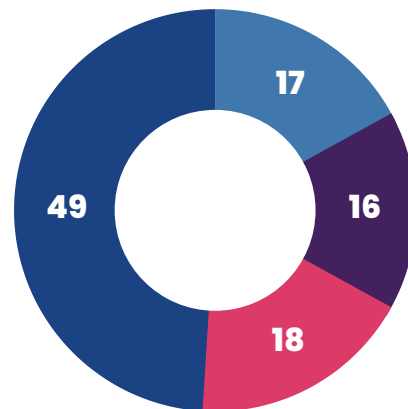
Before the COVID-19 Pandemic

- All the time
- Most of the time
- Some of the time
- Not at all



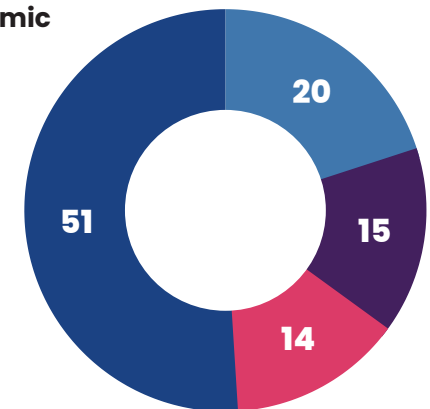
Partner

- They always work remotely
- They frequently work remotely
- They occasionally work remotely
- They cannot work remotely



Since the COVID-19 Pandemic

- All the time
- Most of the time
- Some of the time
- Not at all



Base All administered / respondents (n=1655 / 1639 / 2750)

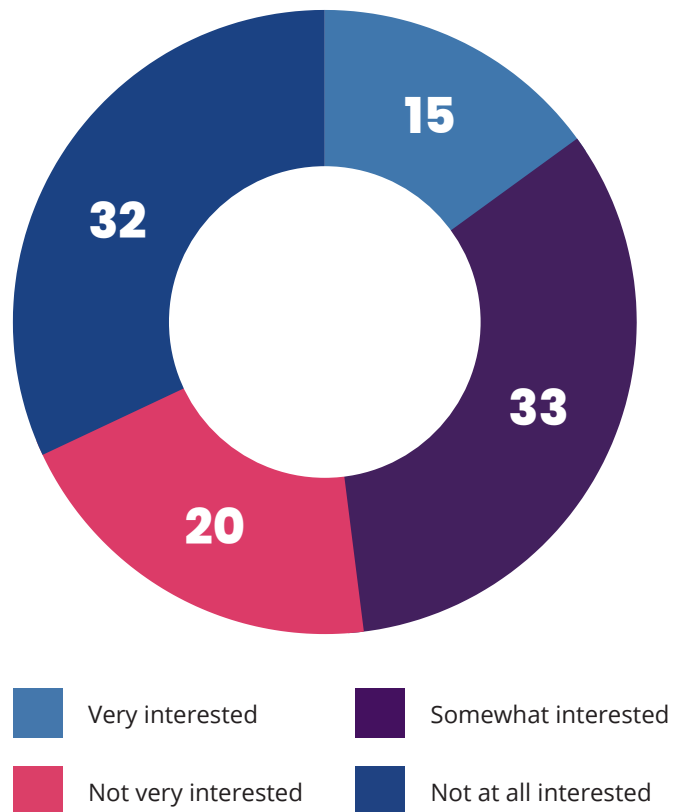
Q42. Which of the following best describes the opportunities you have to work remotely (i.e., from your home or another location away from your regular workplace)?

Q43. And thinking about your partner or spouse, which of the following best describes the opportunities you have to work remotely (i.e., from your home or another location away from your regular workplace)?

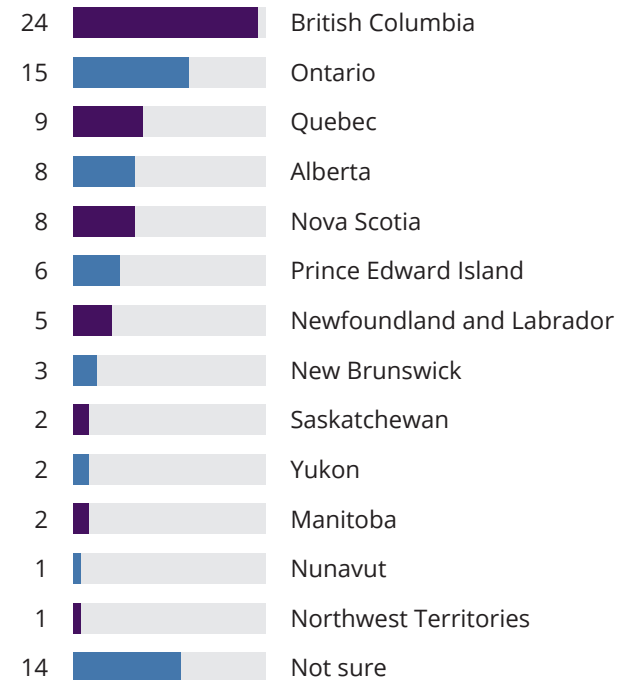
Q44. How often, if at all, have you worked remotely...

Nearly half of Canadians are interested in remote living/working temporarily, with one in four naming British Columbia as their preferred location.

Interest in Temporary Remote Living/working



Preferred Province/Territory to Live/Work Remotely

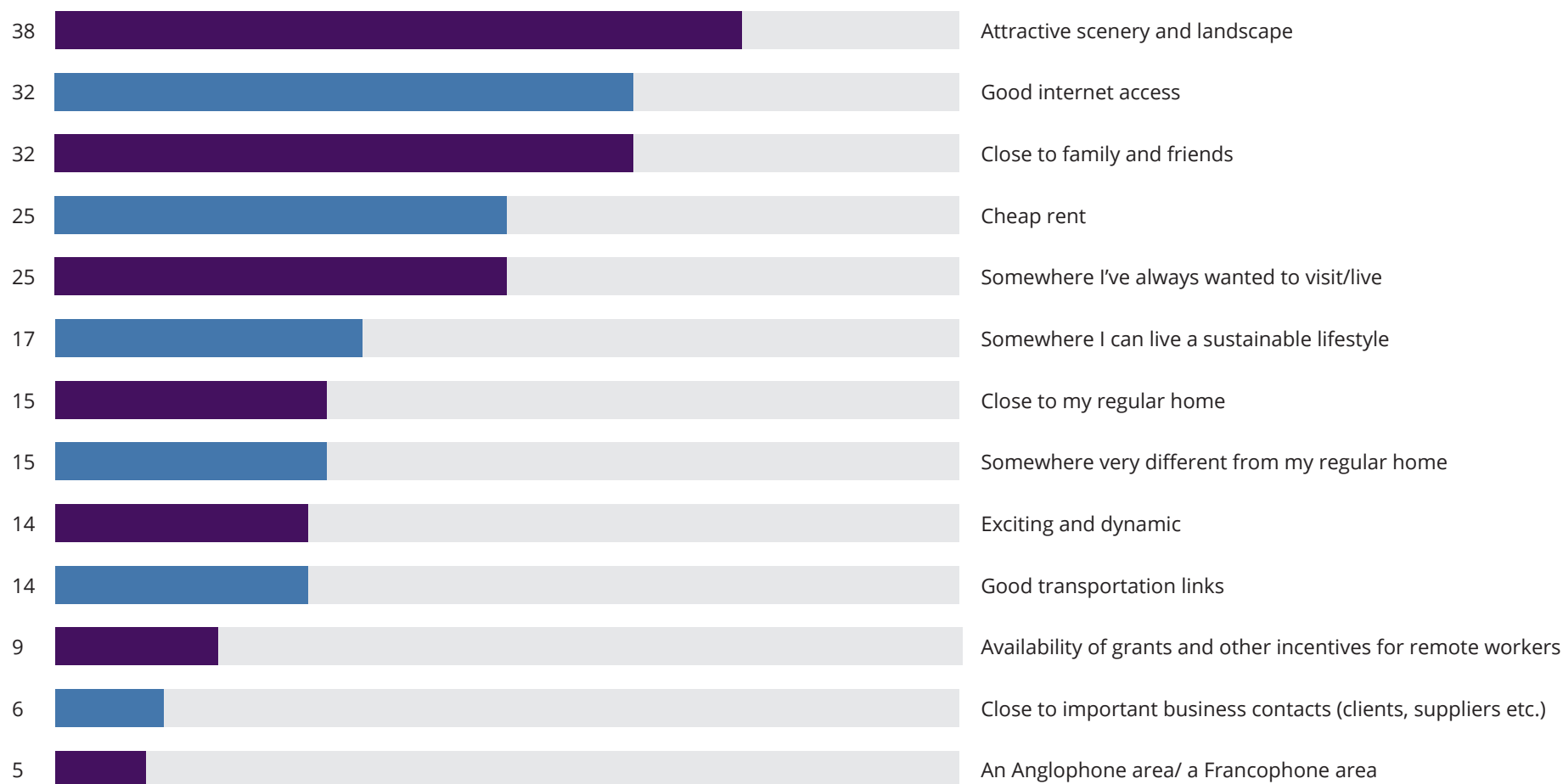


Base All respondents (n=2750)

Q45. How interested, if at all, would you be in temporarily living and working remotely from another part of Canada in the future?

Q46. If you were to temporarily live and work remotely from another part of Canada in the future, which provinces or territories would you be most likely to choose?

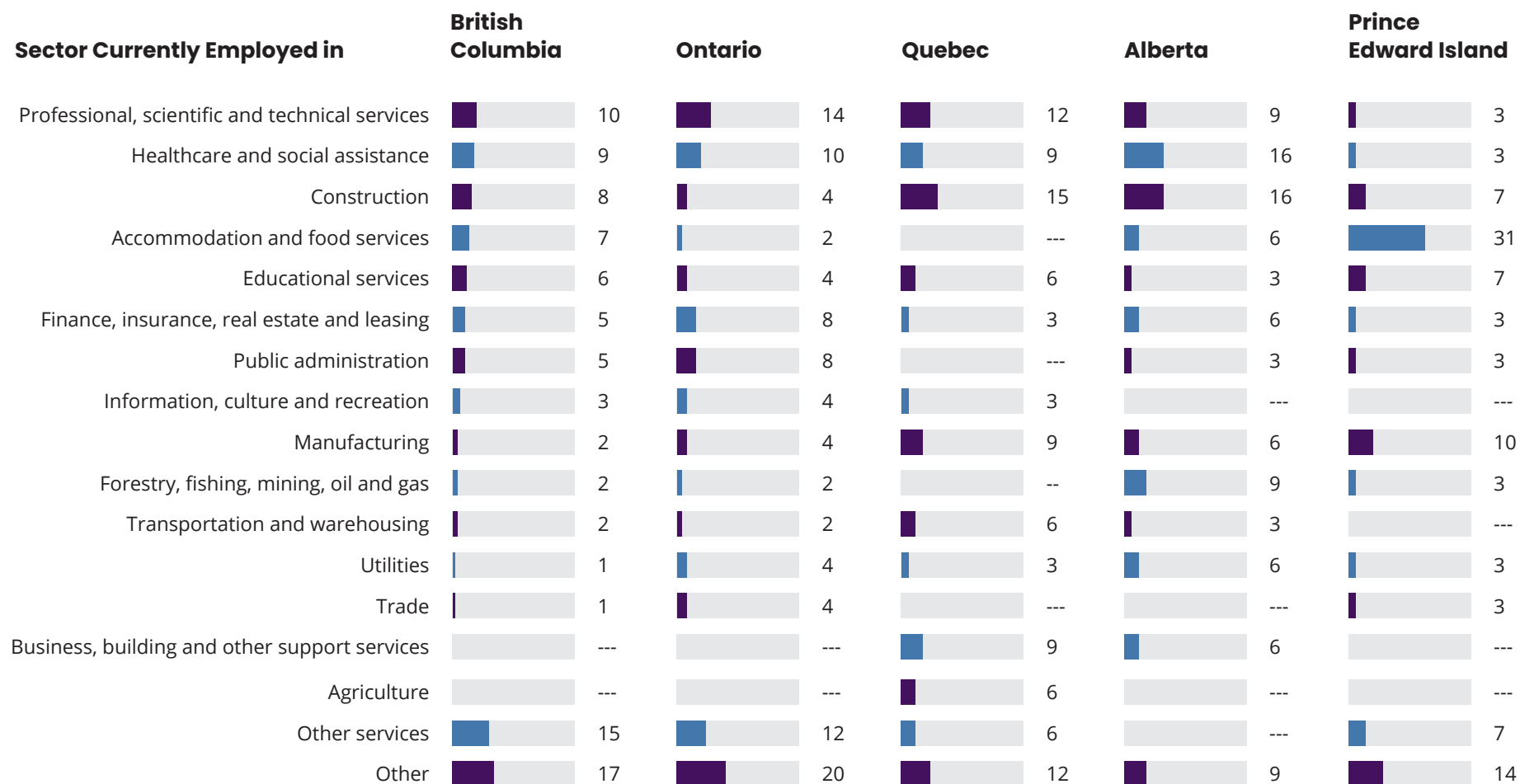
Attractive scenery, internet access and proximity to family/friends are key location factors.



Base All respondents (n=2750)

Q48. Which of the following would be the most important considerations for you when choosing a location to temporarily live and work remotely?

Professional services, healthcare and construction workers are well represented among those interested in relocating to most popular provinces.



Base All those who have very interested (n=121,51,33,32,29)

Q46. Which of the following would be the most important considerations for you when choosing a location to temporarily live and work remotely?

Q49. Please select the sector you work in from the list below.

March 2021

Perspectives and Preferences of Winter/Shoulder Season Travellers

A National Survey of Canadian Travel Consumers

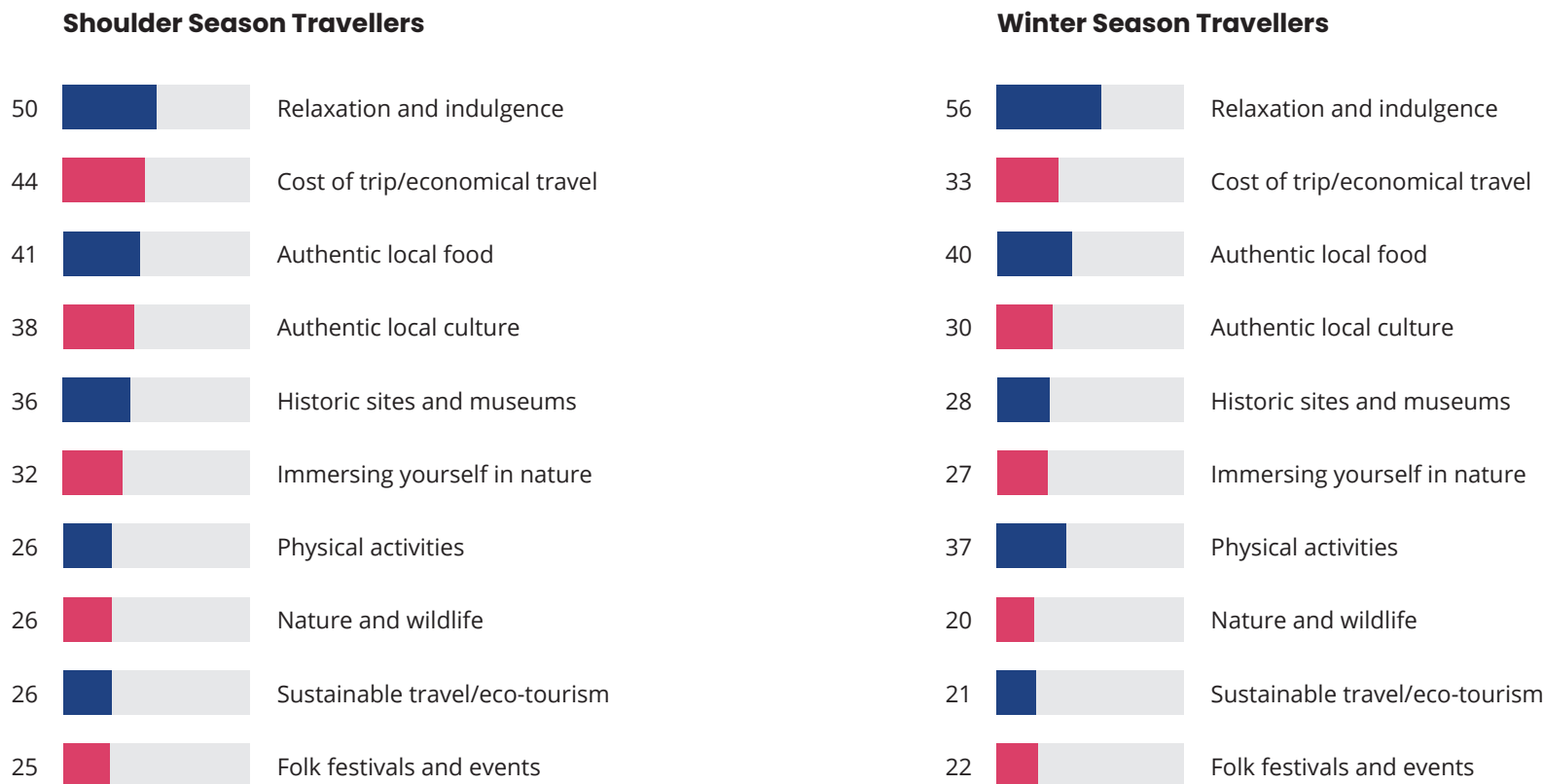


Findings Snapshot

- Physical activities are higher priority for winter season travellers, with cost a lesser factor.
- Whale watching and visiting national parks popular among both winter and shoulder visitors.
- Okanagan Valley and Jasper among the most popular potential British Columbia and Alberta destinations for winter/shoulder travellers.
- Major urban centres most popular potential destinations in Saskatchewan, Manitoba, and Yukon among winter/shoulder travellers.
- Little evidence that winter/shoulder season travellers differ in destination preference in Ontario, Quebec, and Nunavut.
- St John's, Moncton and Halifax are top Maritimes destinations for winter/shoulder travellers.
- Victoria and Vancouver attractions have greatest appeal in British Columbia for winter/shoulder season travellers.
- Parks, spas and lakes are popular attractions in Saskatchewan, Manitoba, and Yukon among winter/shoulder season travellers.
- Appeal of Niagara Falls and historic Quebec urban centres also apparent among winter/shoulder travellers.
- National parks in Maritimes hold strong appeal among winter/shoulder season travellers.
- COVID-19 concern is dominant reason for reluctance to local travel among winter/shoulder travellers.
- Referrals and social media are top inspiration sources for winter/shoulder travellers – as they are overall.



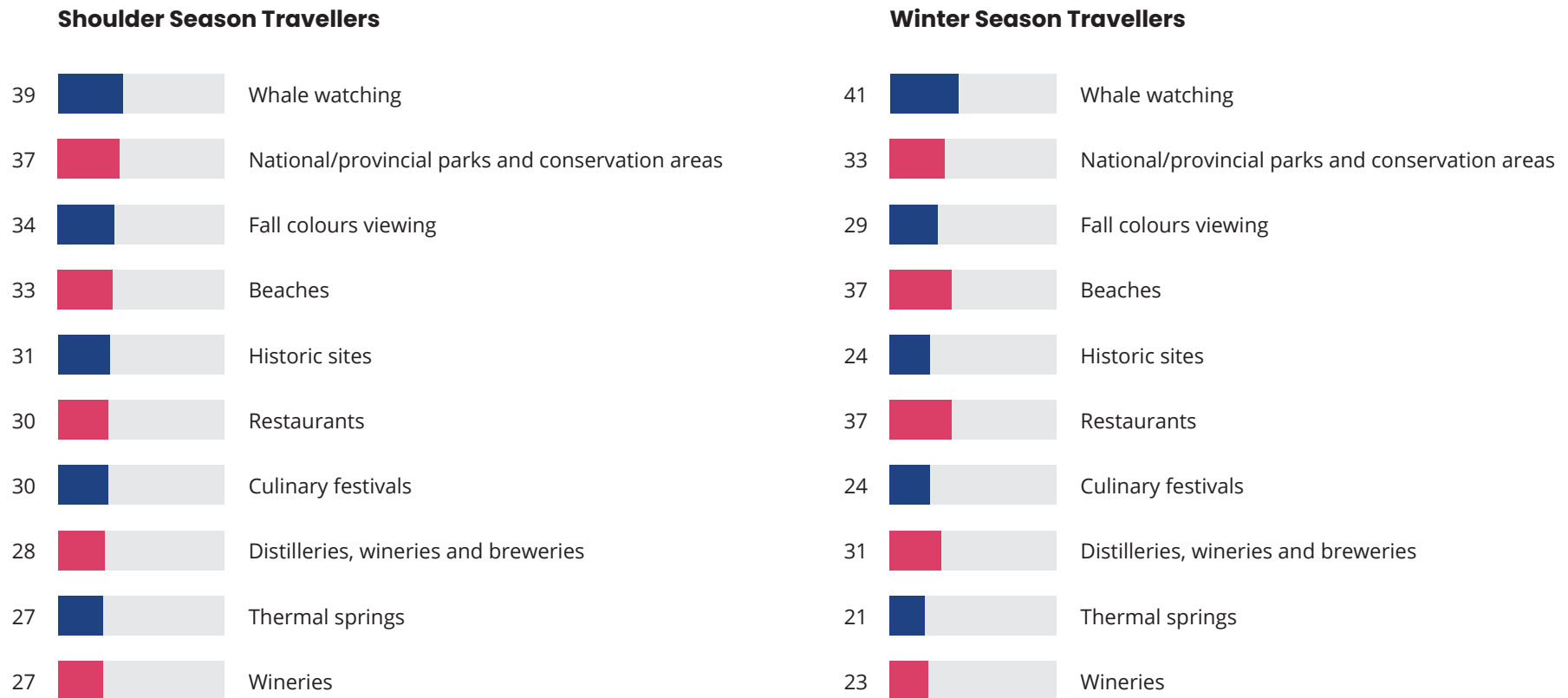
Physical activities are higher priority for winter season travellers, with cost a lesser factor.



Base All shoulder season travellers (n=776) / winter season travellers (n=86)

Q9. We would now like to ask you about different experiences that you may seek out while travelling for leisure (whether close to home or further away). We will now show you a few lists of different experiences. For each one, please select the experience that is most important to you, and the experience that is least important for you.

Whale watching and visiting national parks popular among both winter and shoulder visitors.

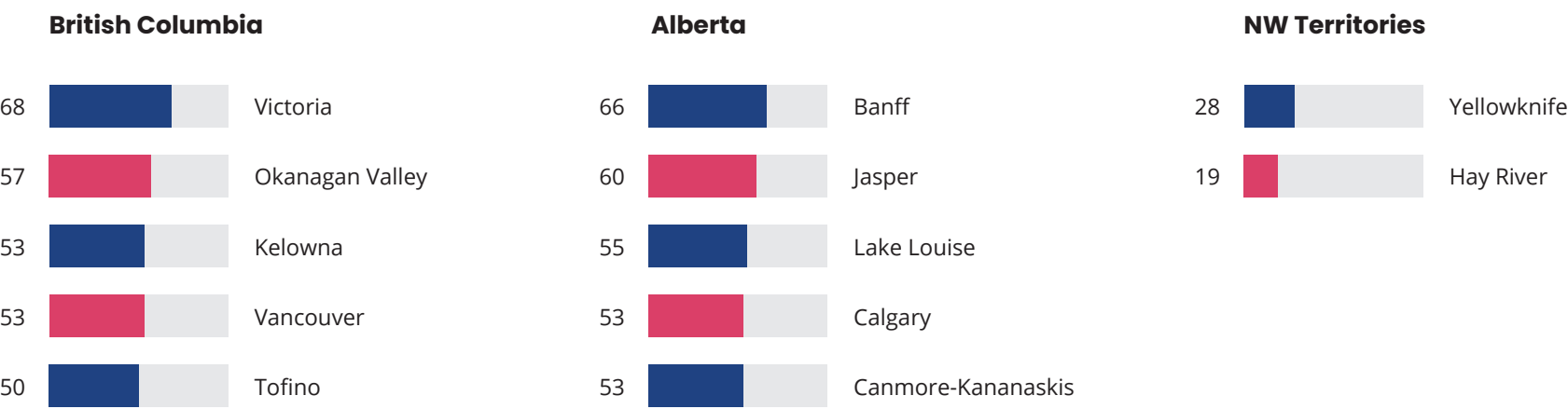


Base All shoulder season travellers (n=776) / winter season travellers (n=86)

Q28. You will now be shown a number of lists of activities you might want to do on a future leisure trip within Canada. For each list, please indicate the activity you would be most interested in doing, and the activity you would be least interested in doing.

Okanagan Valley and Jasper among the most popular potential British Columbia and Alberta destinations for winter/shoulder travellers.

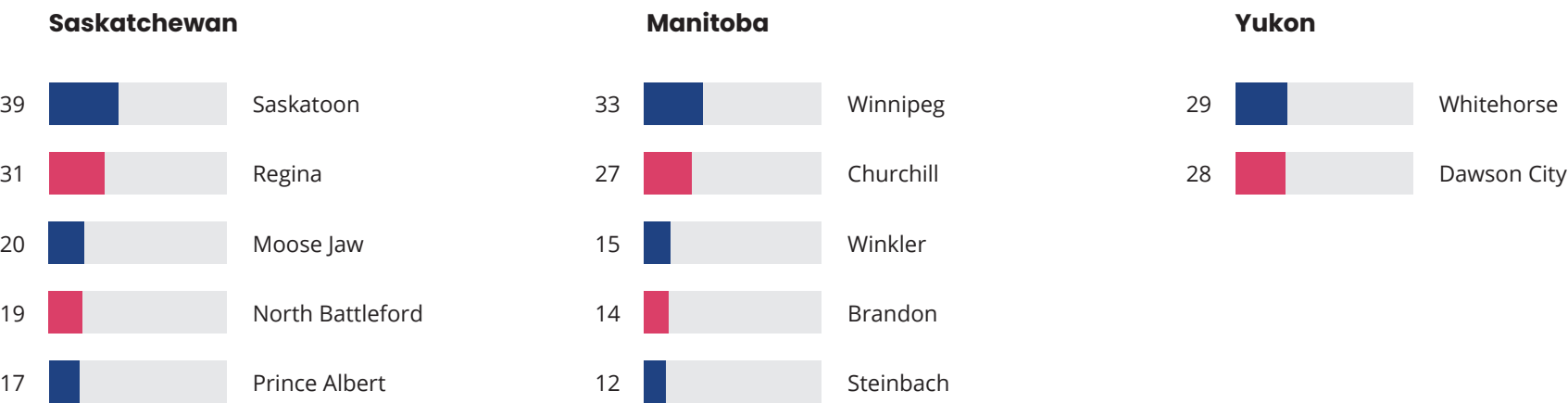
% winter/shoulder season travellers interested in visiting each destination on potential future leisure trip



Base All shoulder and winter season travellers BC (n=211) / NT (n=47) / AB (n=240)
Q23. Here are some destinations that you might choose to travel to within your own province/territory and neighbouring provinces/territories. For each one, please indicate how interested, if at all, you would be in travelling there for leisure purposes.

Major urban centres most popular potential destinations in Saskatchewan, Manitoba and Yukon among winter/shoulder travellers.

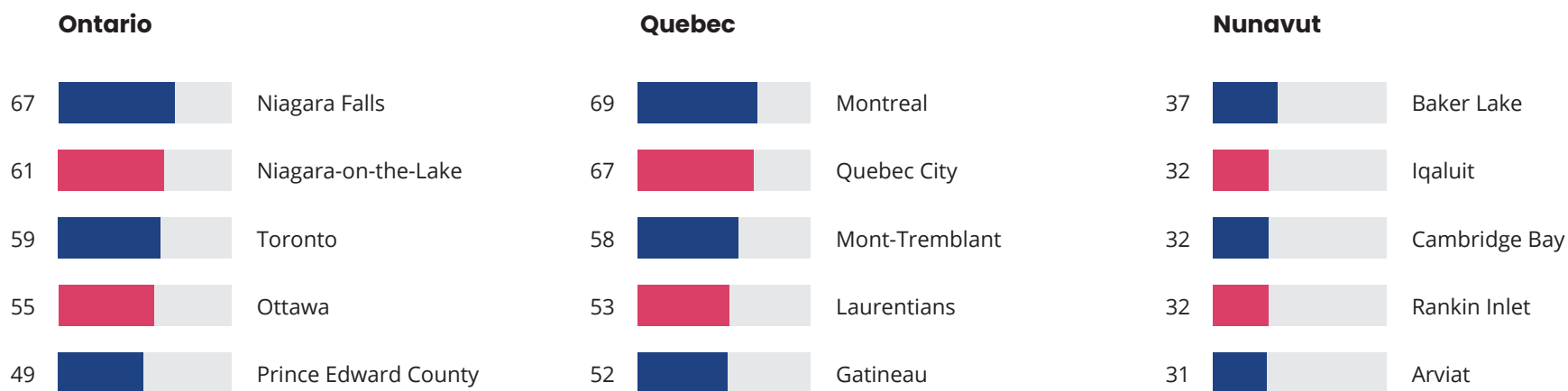
% winter/shoulder season travellers interested in visiting each destination on potential future leisure trip



Base All shoulder and winter season travellers SK (n=94) / YT (n=78) / MB (n=108)
Q23. Here are some destinations that you might choose to travel to within your own province/territory and neighbouring provinces/territories. For each one, please indicate how interested, if at all, you would be in travelling there for leisure purposes.

Little evidence that winter/shoulder season travellers differ in destination preference in Ontario, Quebec, and Nunavut.

% winter/shoulder season travellers interested in visiting each destination on potential future leisure trip

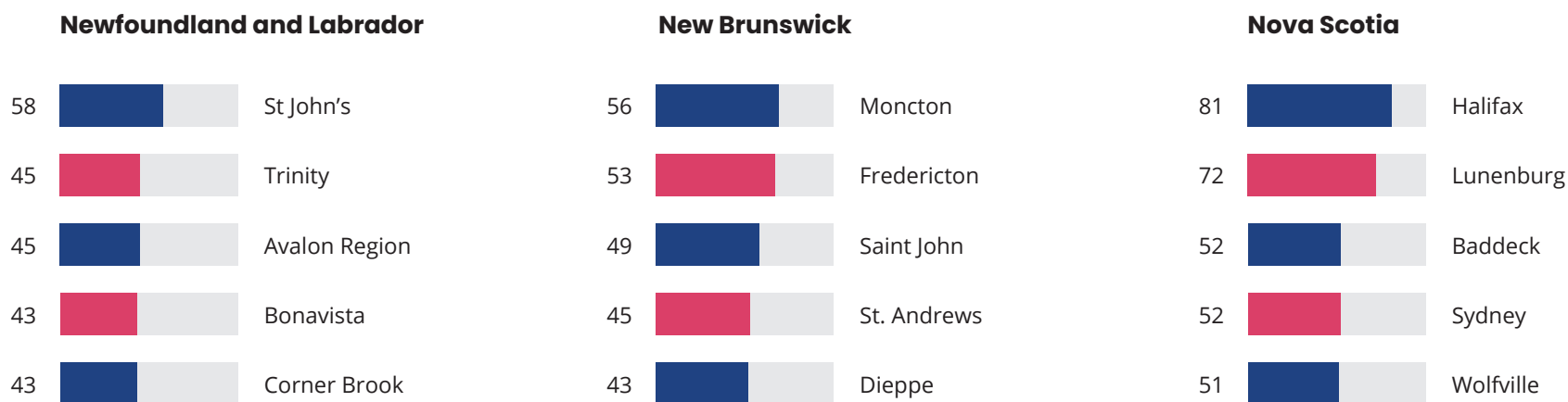


Base All shoulder and winter season travellers ON (n=247) / NU (n=121) / QC (n=226)

Q23. Here are some destinations that you might choose to travel to within your own province/territory and neighbouring provinces/territories. For each one, please indicate how interested, if at all, you would be in travelling there for leisure purposes.

St John's, Moncton and Halifax are top Maritimes destinations for winter/shoulder travellers.

% winter/shoulder season travellers interested in visiting each destination on potential future leisure trip

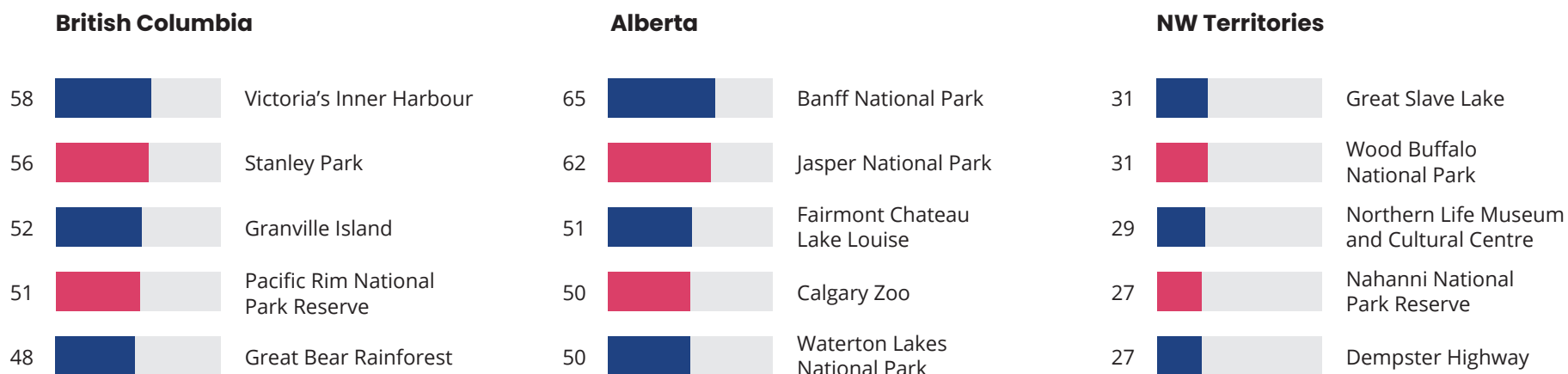


Base All shoulder and winter season travellers NL (n=74) / NS (n=81) / NB (n=139)

Q23. Here are some destinations that you might choose to travel to within your own province/territory and neighbouring provinces/territories. For each one, please indicate how interested, if at all, you would be in travelling there for leisure purposes.

Victoria and Vancouver attractions have greatest appeal in British Columbia for winter/shoulder season travellers.

% winter/shoulder season travellers interested in visiting each attraction on potential future leisure trip

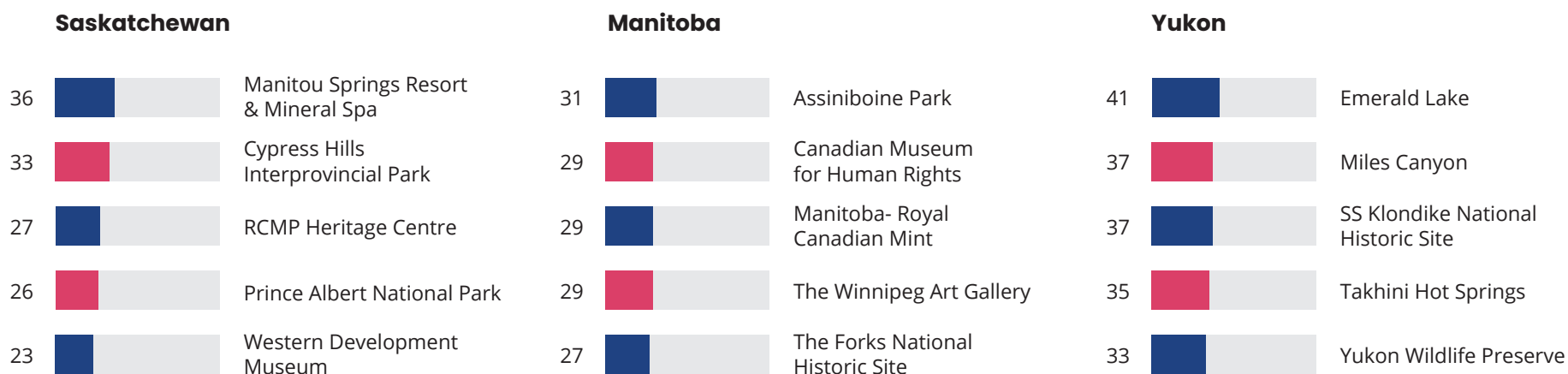


Base All shoulder and winter season travellers BC (n=211) / NT (n=48) / AB (n=240)

Q25. And how interested, if at all, are you in visiting each of these attractions?

Parks, spas and lakes are popular attractions in Saskatchewan, Manitoba, and Yukon among winter/shoulder season travellers.

% winter/shoulder season travellers interested in visiting each attraction on potential future leisure trip

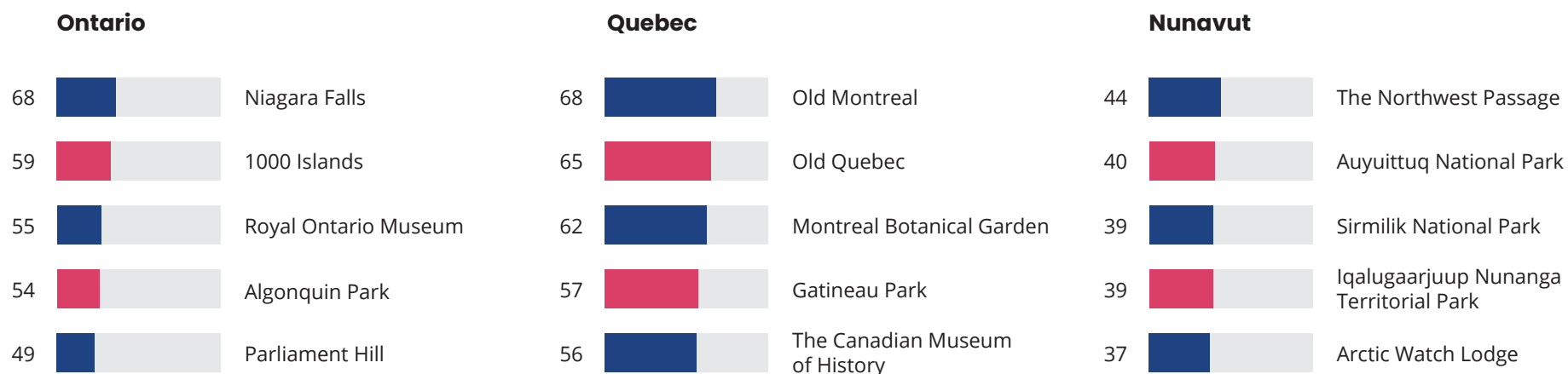


Base All shoulder and winter season travellers SK (n=94) / YT (n=78) / MB (n=108)

Q25. And how interested, if at all, are you in visiting each of these attractions?

Appeal of Niagara Falls and historic Quebec urban centres also apparent among winter/shoulder travellers.

% winter/shoulder season travellers interested in visiting each attraction on potential future leisure trip

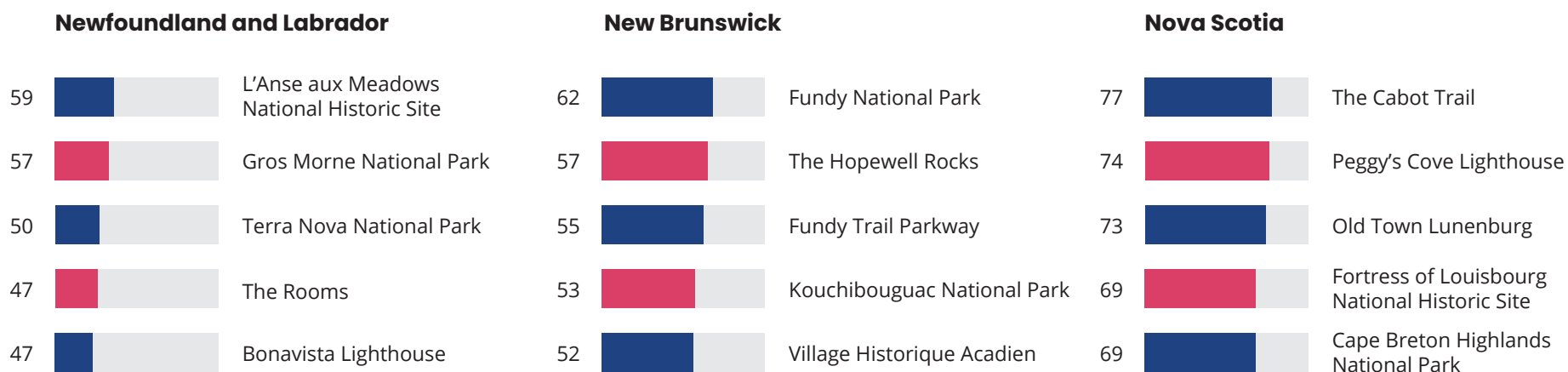


Base All shoulder and winter season travellers ON (n=247) / NU (n=121) / QC (n=226)

Q25. And how interested, if at all, are you in visiting each of these attractions?

National parks in Maritimes hold strong appeal among winter/shoulder season travellers.

% winter/shoulder season travellers interested in visiting each attraction on potential future leisure trip



Base All shoulder and winter season travellers NL (n=74) / NS (n=81) / NB (n=139)

Q25. And how interested, if at all, are you in visiting each of these attractions?

COVID-19 concern is dominant reason for reluctance to local travel among winter/shoulder travellers.

Shoulder Season Travellers

COVID/health concerns



Wish for a change of scene/somewhere new



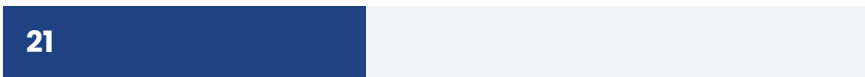
Too familiar/seen everything already



Too expensive/poor value for money



Too many crowds



Winter Season Travellers

COVID/health concerns



Wish for a change of scene/somewhere new



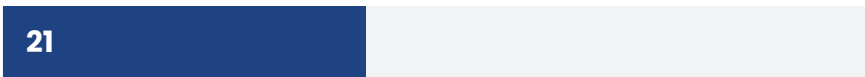
Too familiar/seen everything already



Too expensive/poor value for money



Too many crowds



Base All shoulder season travellers (n=776) / winter season travellers (n=86)
Q26. Here are some reasons why people might prefer not to take an overnight leisure trip within their own province or territory. Which of the following would be the most likely reasons for you not to want to make this sort of trip within your own province?

Referrals and social media are top inspiration sources for winter/shoulder travellers – as they are overall.

Shoulder Season Travellers

Referrals And Recommendations

75

Social Media Channels

58

Print

53

Television

44

Destination Websites

43

Winter Season Travellers

Referrals And Recommendations

69

Social Media Channels

60

Print

40

Television

29

Destination Websites

38

Base All shoulder season travellers (n=776) / winter season travellers (n=86)

Q30. When you choose a destination within Canada for a leisure trip, which of the following sources are usually most important in inspiring you?



Twenty31 Consulting is a research and innovation-based management consultancy working with senior leaders of travel and tourism organizations to define and build sustainable, competitive advantage.