

2024 GLOBAL TRAVELLER RESEARCH PROGRAM

UNITED STATES HIGHLIGHTS REPORT



Canada



Maligne Lake Alberta



CANADIAN TOURISM DATA
collective

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STUDY OVERVIEW: UNITED STATES MARKET



The Global Traveller Research Program is an annual survey commissioned by Destination Canada and conducted by YouGov Canada. The study fielded online in English, with sample being sourced from a nationally established panel.

The target population are residents aged 18 years and older who have taken an out of state vacation trip, where they had stayed at least 1 nights with a minimum of 1 night in paid accommodations in the past 3 years, or plan to take such a trip in the next 2 years.

Highly Engaged Guest (HEG) Audience Definition: Four segments that have been identified by Destination Canada as having higher economic and responsible values that most benefit Canadian communities.



Timing of Fieldwork

**November 18th –
December 6th, 2024**



**Geographical Definition
for Qualified Trips**

Outside of: your state



Sample Distribution

Sample distribution:	National
Highly Engaged Guest (HEG) Audience:	2439
Other travellers:	1417
Total sample size:	3856

- In 2023, DC switched research providers to YouGov Canada, with the project being migrated over to YouGov’s proprietary panel.

Key Insights



Canada continues to be a leading international destination among American travellers, with next 2-year immediate potential for Canada being 47.8M



Potential visitors to Canada are more likely to consider a visit during the Summer months, but are equally likely to visit during Spring or Fall



Travellers are interested in local cuisine, nature walks, natural attractions, and oceanside beaches



Travellers to Canada in the past 3 years were mostly on vacation trips, choosing Canada for factors such as safety, the destination being somewhere they always wanted to visit, and to relax



There is a high level of interest in Indigenous culture among American Travellers: authenticity of the experience, safety and comfort of the destination, as well as being culturally significant and unique, would increase their interest in Indigenous cultural experiences

MARKET SIZING



Killarney Provincial Park
Ontario



MARKET SIZING – OUT-OF-STATE TRAVELLERS

Total Population 18+

64% Passport Ownership

59% Took an Out-of-State
Pleasure Trip in the Past 3 Years

54% Plan To Take Out-Of-State
Pleasure Trip In Next 2 Years

56.6% Incidence Rate

Total out-of-state pleasure travel
incidence (past 3 years/planned
next 2 years) and current
passport holders/intenders

260,962,000 (Total US Population 18+)

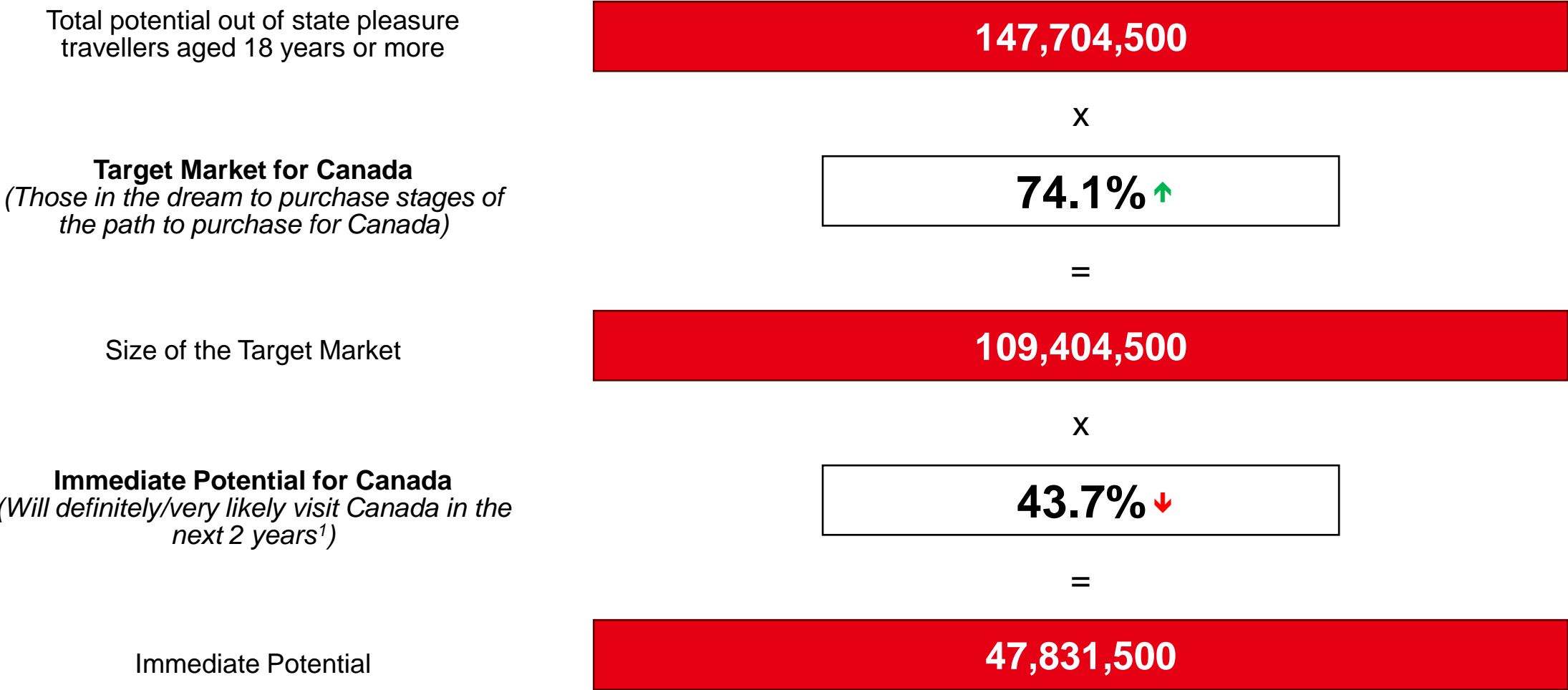
167,015,500 (Passport Ownership)

153,967,500 (Recent Out-of-State Travellers)

140,919,500 (Upcoming Out-of-State Travellers)

147,704,500 (Total Out-of-State Travellers)

POTENTIAL MARKET SIZE FOR CANADA (NEXT 2 YEARS)



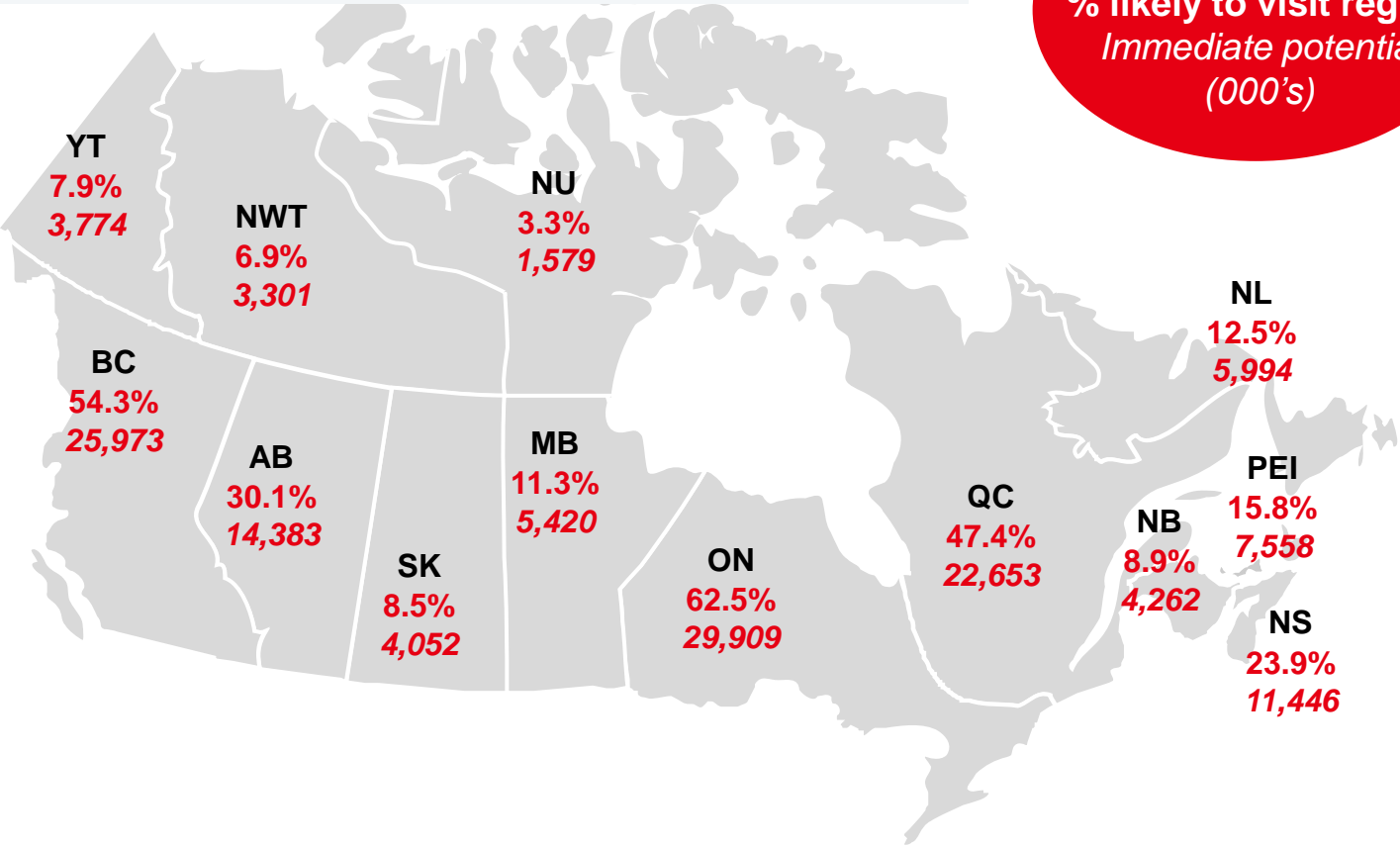
¹ Includes respondents likely to visit Canada for a trip of 1 to 3 nights, or a trip of 4 nights or more.
Base: Target market for Canada = out-of-state pleasure travellers (past 3 years or next 2 years) (n=3856); Immediate potential for Canada = dream to purchase stages for P2P for Canada (n=2904)
C1. Which of the following best describes your current situation when thinking about each of the following destinations for a vacation trip? (Select one for each)
E1. Realistically, how likely are you to take a vacation trip to Canada in the next 2 years? (Select one)

POTENTIAL MARKET SIZE BY REGION

Ontario and BC have the potential to draw in over 25 million American travellers each over the next 2 years.

Immediate Potential for Canada: **47,831,500**

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



Base: Those in the dream to purchase stages of the path to purchase for Canada and definitely/very likely to take a trip to Canada (n=2904)
 E2. If you were to take a vacation trip to Canada, in the next 2 years, which of the following Canadian provinces or territories are you likely to visit? (Select all that apply)



Nunavut

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

Province/Territory	Winter (Dec, Jan, Feb)	Spring (Mar, Apr, May)	Summer (Jun, Jul, Aug)	Fall (Sept, Oct, Nov)
British Columbia	8%	20%	30%	21%
Alberta	5%	11%	15%	10%
Saskatchewan	2%	3%	4%	3%
Manitoba	2%	4%	5%	4%
Ontario	9%	22%	34%	23%
Quebec	7%	18%	27%	18%
New Brunswick	1%	3%	5%	3%
Nova Scotia	2%	8%	15%	9%
Prince Edward Island	1%	5%	10%	6%
Newfoundland & Labrador	1%	4%	8%	5%
Yukon	1%	2%	4%	3%
Northwest Territories	1%	2%	4%	2%
Nunavut	1%	1%	2%	1%

Base: Those in the dream to purchase stages of the path to purchase for Canada & definitely/likely to take a trip to Canada (n=2904) E3a-m. During what time of year are you considering visiting [PROVINCE]? (Select all that apply)



Out-of-state travellers likely to visit Canada in the next 2 years have the strongest consideration for the summer months. Ontario and BC are popular during spring and fall months.



Whitehorse
Yukon

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December 2024



CANADA VS. COMPETITORS



Alberta



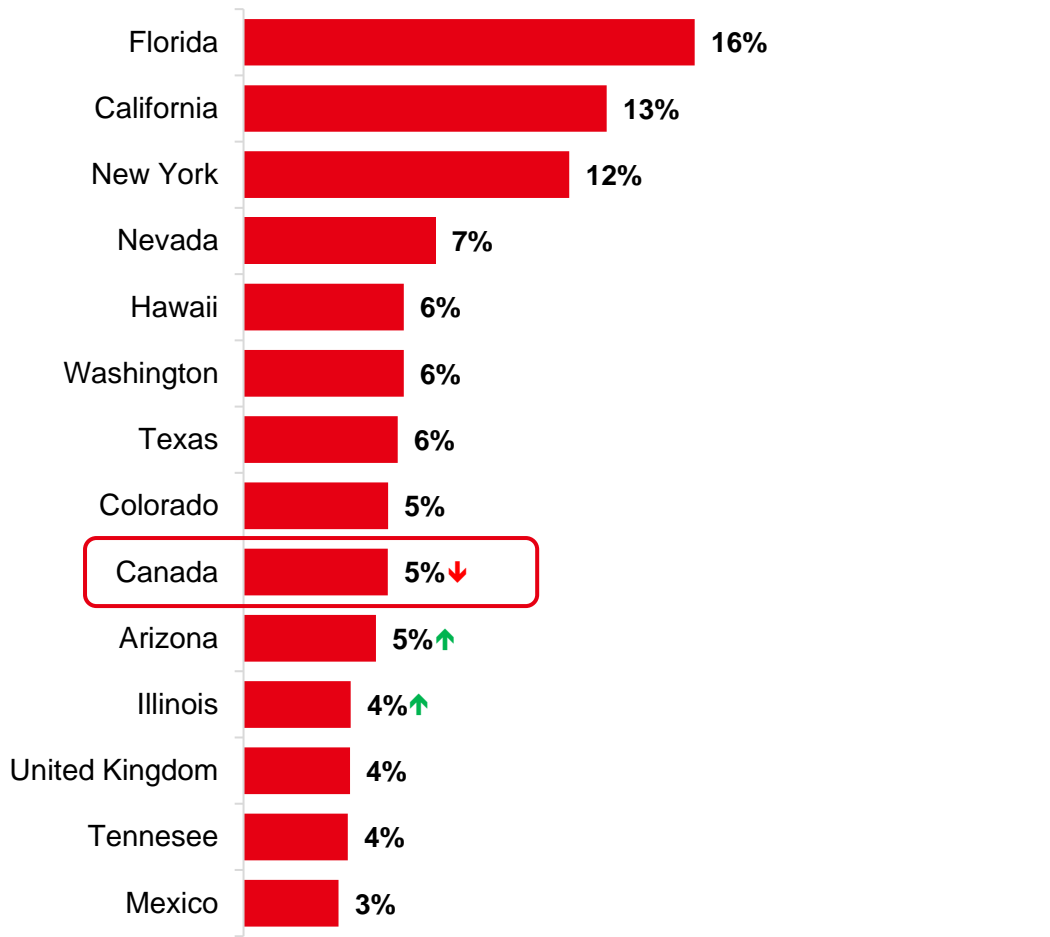


On an unaided basis, American travellers are more likely to consider Florida, California, and New York for future travel destinations, while Canada was the highest-ranking destination outside of the US.




 **Tofino**
British Columbia

UNAIDED DESTINATION CONSIDERATION (NEXT 2 YEARS)¹



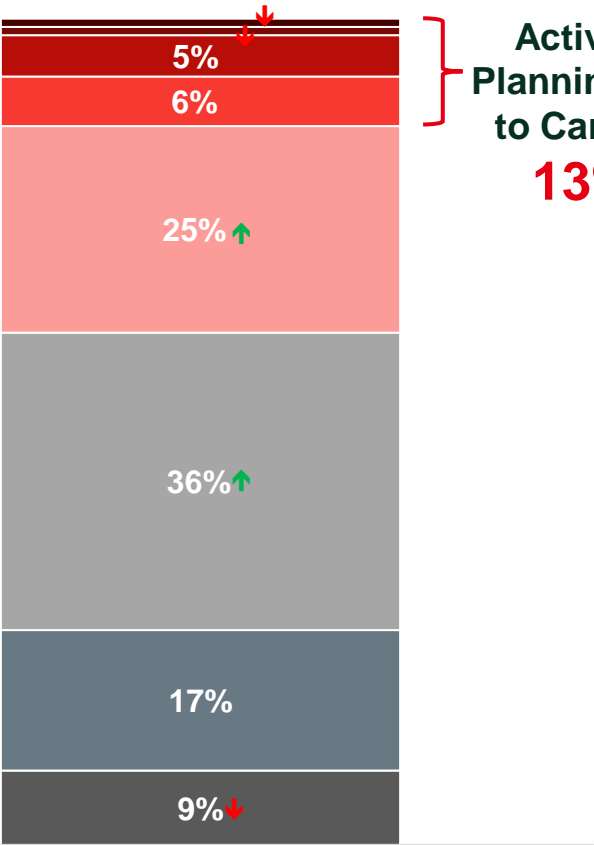
¹ Roll-up of brand mentions by US State/country (e.g., percentage who said “Canada” or any destination in Canada).
Base: Out-of-state pleasure travellers (past 3 years or next 2 years) (n=3856)
B1. You mentioned that you are likely to take out-of-state vacation trip in the next 2 years. Which destinations are you seriously considering? (Please list up to 3 destinations)

↑ / ↓ = significantly higher/lower result (2024 vs. 2023)

United States GTRP – December 2024  11

STAGE IN THE PURCHASE CYCLE FOR CANADA

- Have already booked my transportation and accommodations
- Am currently making transportation and accommodation arrangements
- Am planning the itinerary for a trip to this country
- Have started to gather some travel information for a trip to this country
- Seriously considering visiting / returning in the next 2 years
- Dreaming about visiting / returning someday
- Not interested in visiting / returning in the foreseeable future
- Have never thought of taking a trip to this destination



Actively
Planning trip
to Canada
13%↓

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

↑ / ↓ = significantly higher/lower result (2024 vs. 2023)

Note: all respondents evaluated Canada plus 3 randomly selected countries from the competitive set.
Base: Out-of-state pleasure travellers (past 3 years or next 2 years), Evaluated Canada (n=3856)
C1. Which of the following best describes your current situation when thinking about each of the following destinations for a vacation trip? (Select one for each)



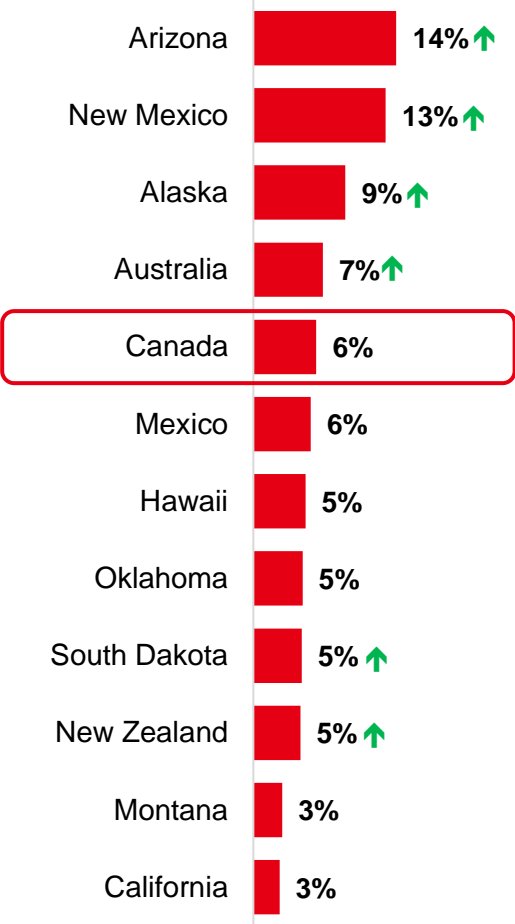
INDIGENOUS TRAVEL



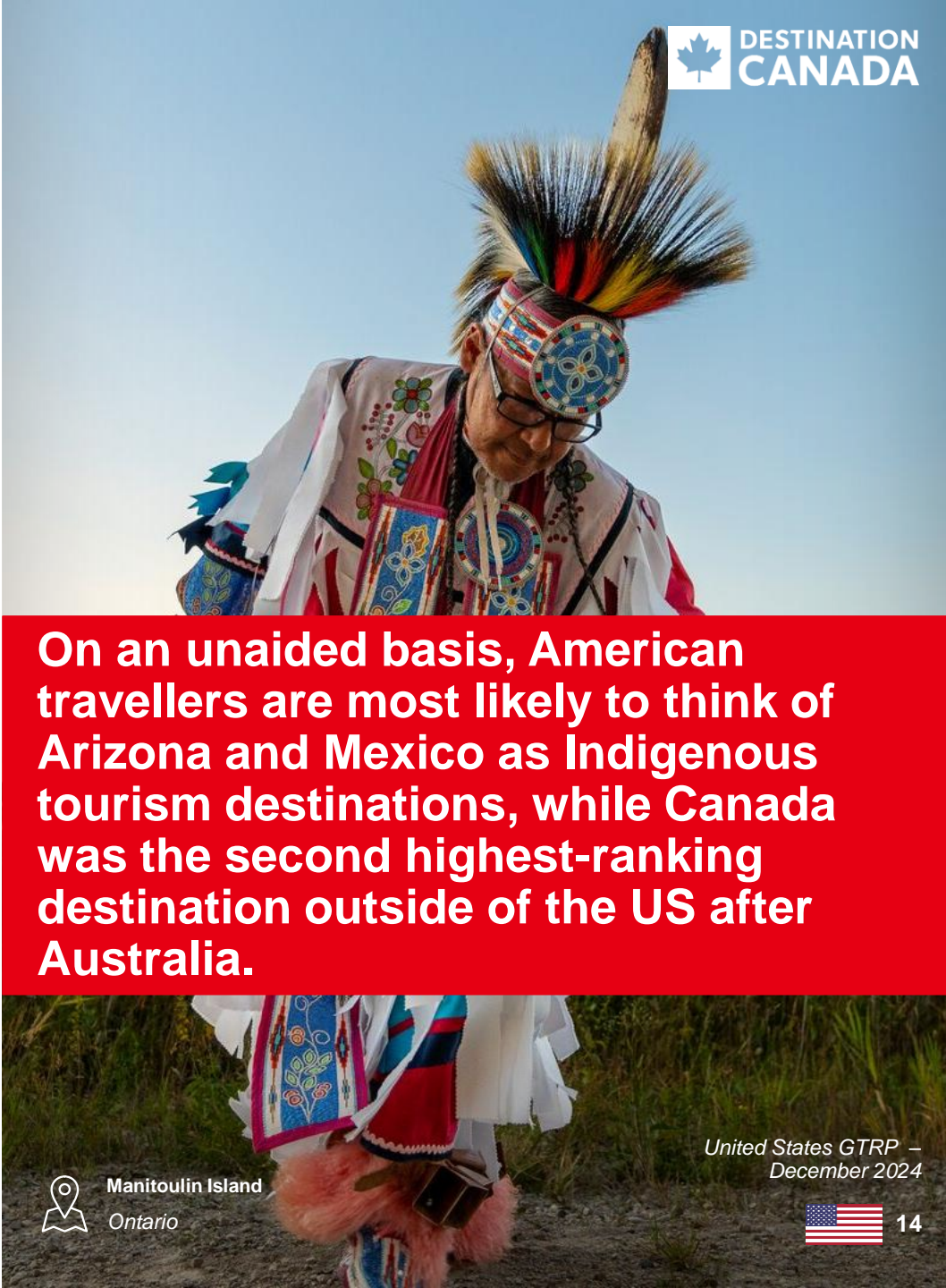
Carcross
Yukon



UNAIDED INDIGENOUS DESTINATION



↑ / ↓ = significantly higher/lower result (2024 vs. 2023)
Base: Out-of-state pleasure travellers (past 3 years or next 2 years) (n=3856)
B4. [DESCRIPTION] What destinations come to mind when thinking about **Indigenous tourism**? (Please list up to 3 destinations. You can mention destinations within or outside of your state.) [DESCRIPTION] Please note: You do not have to limit your responses to destinations you are considering for a vacation trip.



On an unaided basis, American travellers are most likely to think of Arizona and Mexico as Indigenous tourism destinations, while Canada was the second highest-ranking destination outside of the US after Australia.



Manitoulin Island
Ontario

INTEREST IN INDIGENOUS DESTINATIONS



Over one half of American travellers are interested in participating in Indigenous experiences in Canada, with three in ten being very interested.



 Kelowna
British Columbia

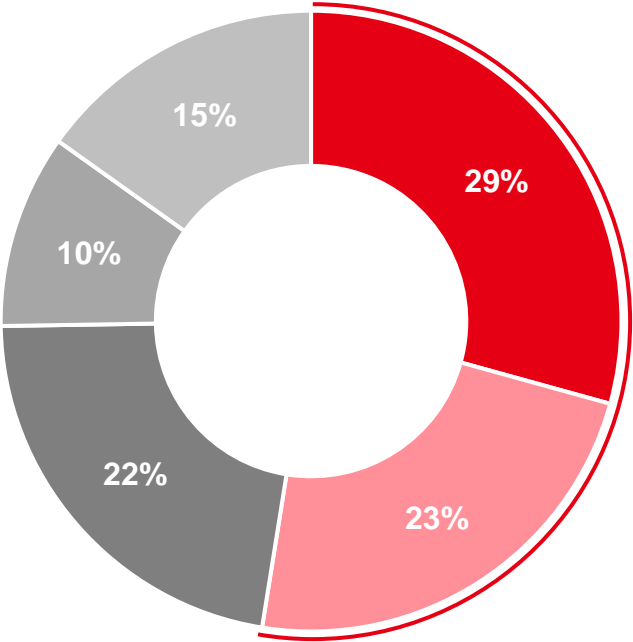
■ 5 - Very interested

■ 4

■ 3

■ 2

■ 1 - Not at all interested

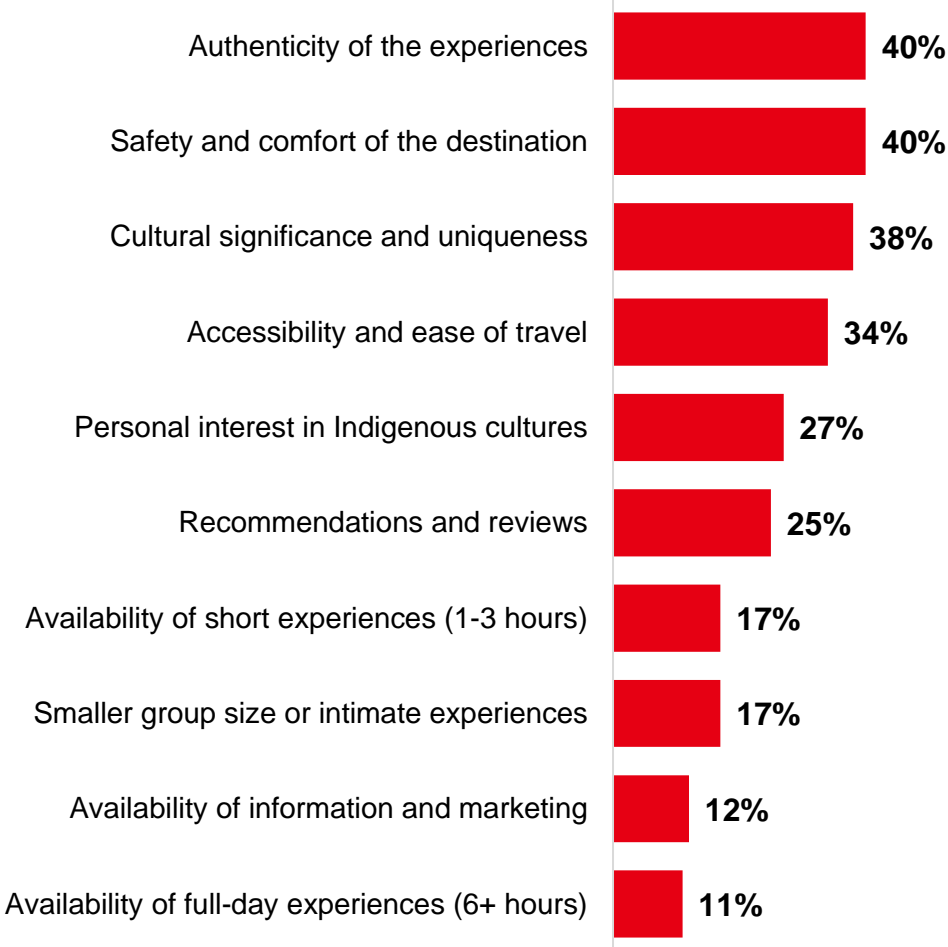


4 or 5 (out of 5)
52%

Note: respondents were asked either about interest in Indigenous destinations (C10) or factors to drive interest in Indigenous cultural experiences (C11)
Base: Out-of-state pleasure travellers (past 3 years or next 2 years) (n=1875)
C10. As you may or may not know, Indigenous peoples are descendants of the original inhabitants of a country or region before people of different cultures or origins arrived. They have unique traditions and ways of life that are often distinct from the larger societies where they live. Indigenous tourism businesses are owned or operated by Indigenous people. How interested are you in participating in Indigenous cultural experiences and tourism activities in the following destinations?

FACTORS TO DRIVE INTEREST IN INDIGENOUS CULTURAL EXPERIENCES

American travellers say authenticity of the experience, safety and comfort of the destination, as well as being culturally significant and unique would increase their interest in Indigenous cultural experiences.



Note: respondents were asked either about interest in Indigenous destinations (C10) or factors to drive interest in Indigenous cultural experiences (C11)
 Base: Out-of-state pleasure travellers (past 3 years or next 2 years) (n=1981)
 C11. What factors would increase your interest in participating in Indigenous cultural experiences and tourism activities in a destination? (Select up to 3)

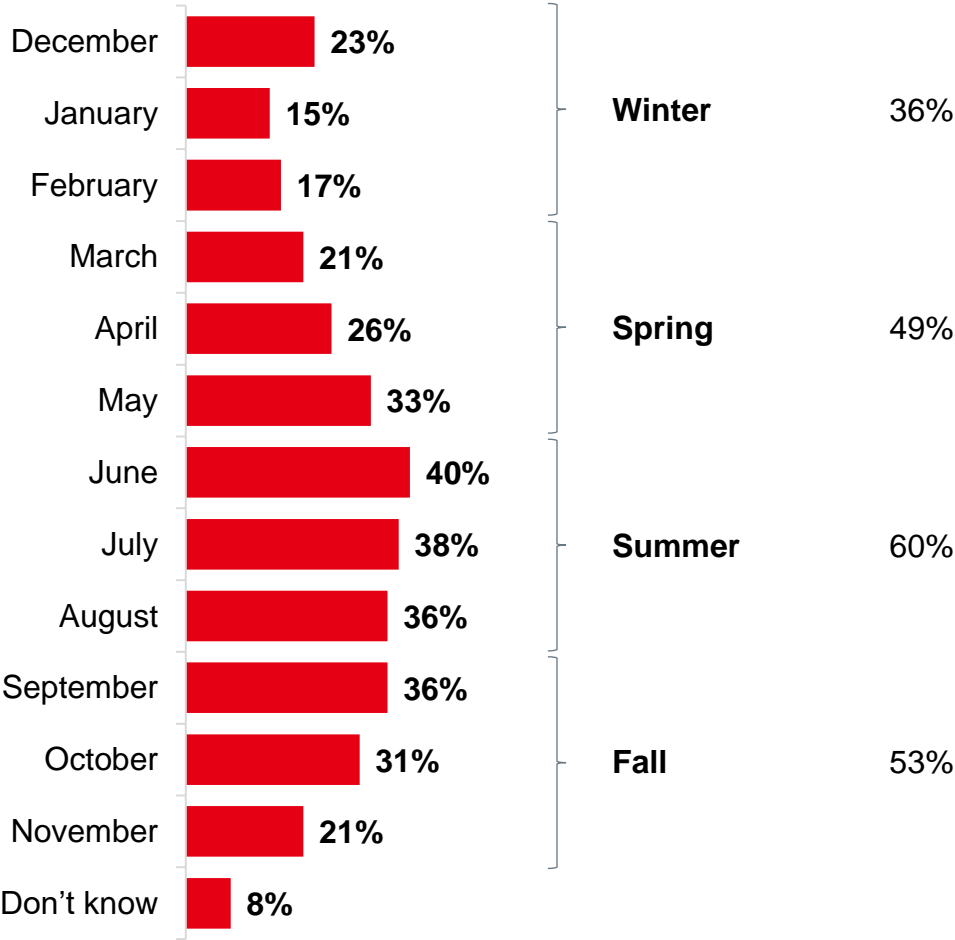
TRAVEL BEHAVIOURS



Montreal
Quebec



PREFERRED TIME OF YEAR FOR VACATION TRIPS



Though summer is the preferred time to take vacation trips, fall and spring are still quite popular among American travellers.



Base: Out-of-state pleasure travellers (past 3 years or next 2 years) (n=3856)
D1. In general, what time of year do you typically like to take vacation trips? Select all that apply



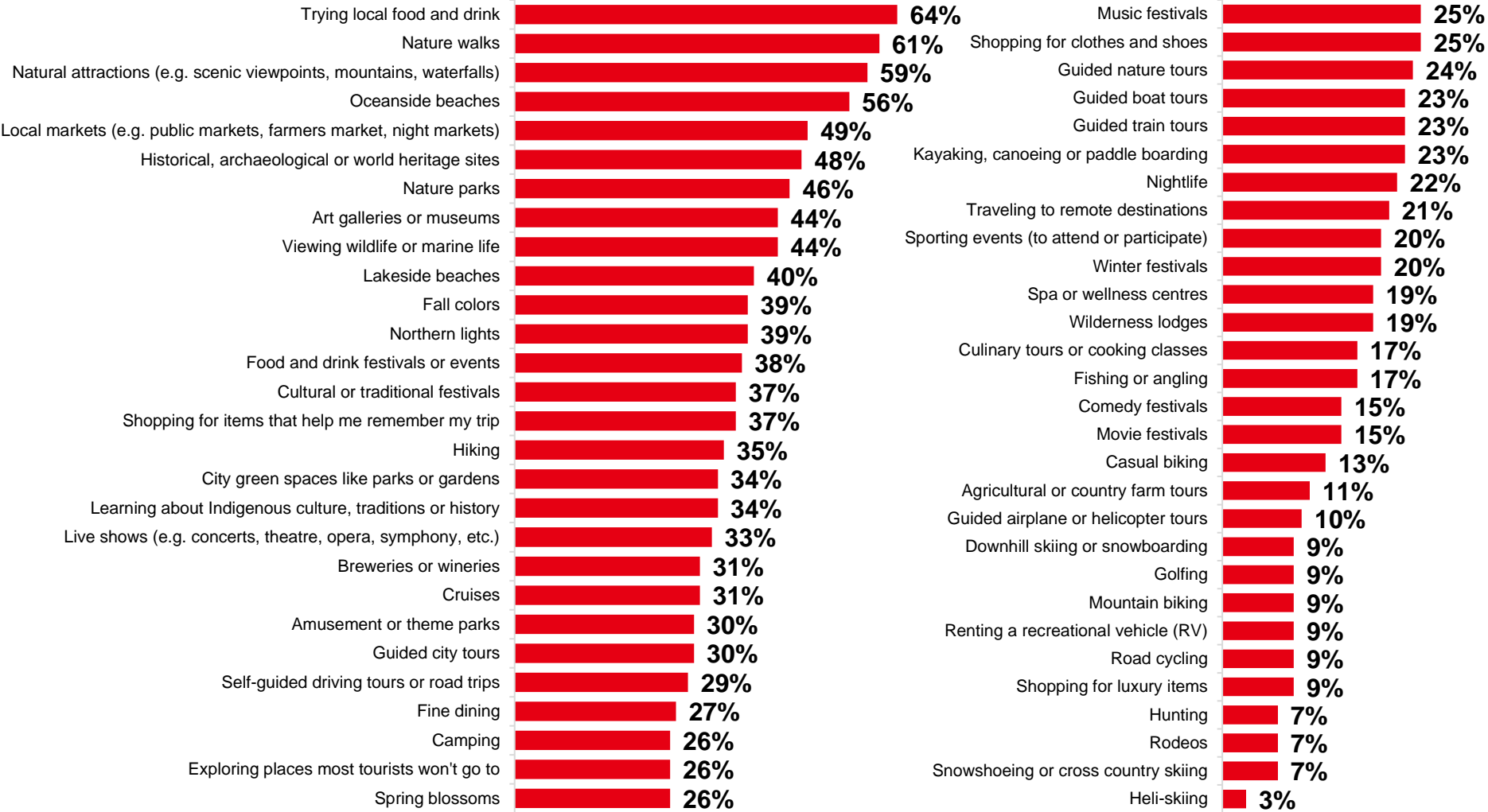
Gros Morne National Park
Newfoundland and Labrador

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GENERAL ACTIVITIES INTERESTED IN (FULL LIST)

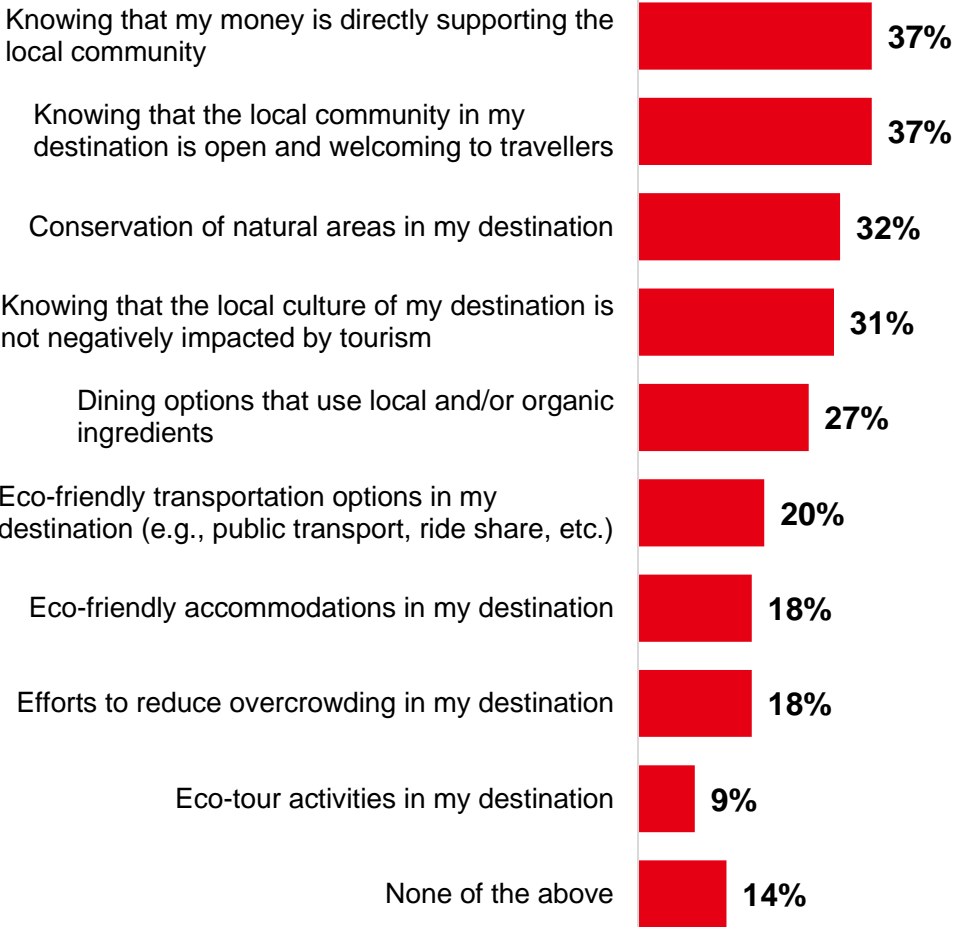
Top activities while on vacation include trying local cuisine, nature walks, natural attractions, and oceanside beaches.



Base: Out-of-state pleasure travellers (past 3 years or next 2 years) (n=3856)
D4. In general, what activities or places are you interested in while on vacation? (Select all that apply)

TOP 3 MOST IMPORTANT SUSTAINABILITY EFFORTS

The most important sustainability efforts are knowing that their money is supporting the local community, and knowing the local community is open and welcoming to travellers.

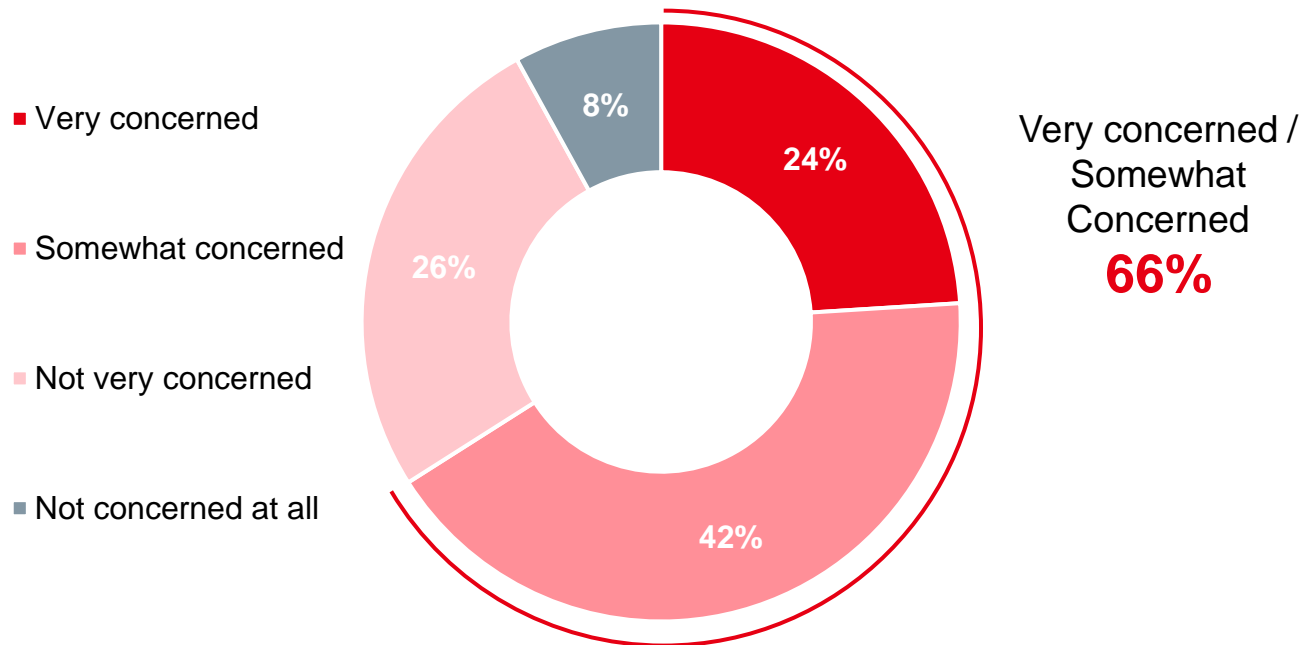


Sustainable Travel Description

Sustainable travel refers to “travel that minimizes any negative impacts on the destination’s environment, economy and society, while making positive contributions to the local people and conserving the destination’s natural and cultural heritage”.

Note: respondents were asked either about most important sustainability efforts (D8) or barriers to sustainable travel (D9)
Base: Out-of-state pleasure travellers (past 3 years or next 2 years) (n=1915)
D8. What are the top 3 sustainability efforts that are most important to you when selecting a vacation destination? Select up to three choices.

IMPACT OF EXTREME WEATHER EVENTS ON TRAVEL PLANS



48% state extreme weather events will **significantly or moderately impact** their travel decisions in the next year

↑ / ↓ = significantly higher/lower result (2024 vs. 2023)

Base: Out-of-state pleasure travellers (past 3 years or next 2 years) (n=3856)

D10. As you may or may not be aware, extreme weather events are occurrences of unusually severe weather or climate conditions. They are often short-lived and include blizzards, heat waves, wildfires, tornadoes, hurricanes or tropical cyclones. How concerned are you about extreme weather events affecting your travel plans?

D15. To what extent do you expect extreme weather events to impact your future travel decisions in the next year?

Majority of travellers are concerned about extreme weather impact on their travel plans, with nearly one half stating that extreme weather will impact their future travel decisions.



Canadian Museum of Human Rights, Winnipeg
Manitoba

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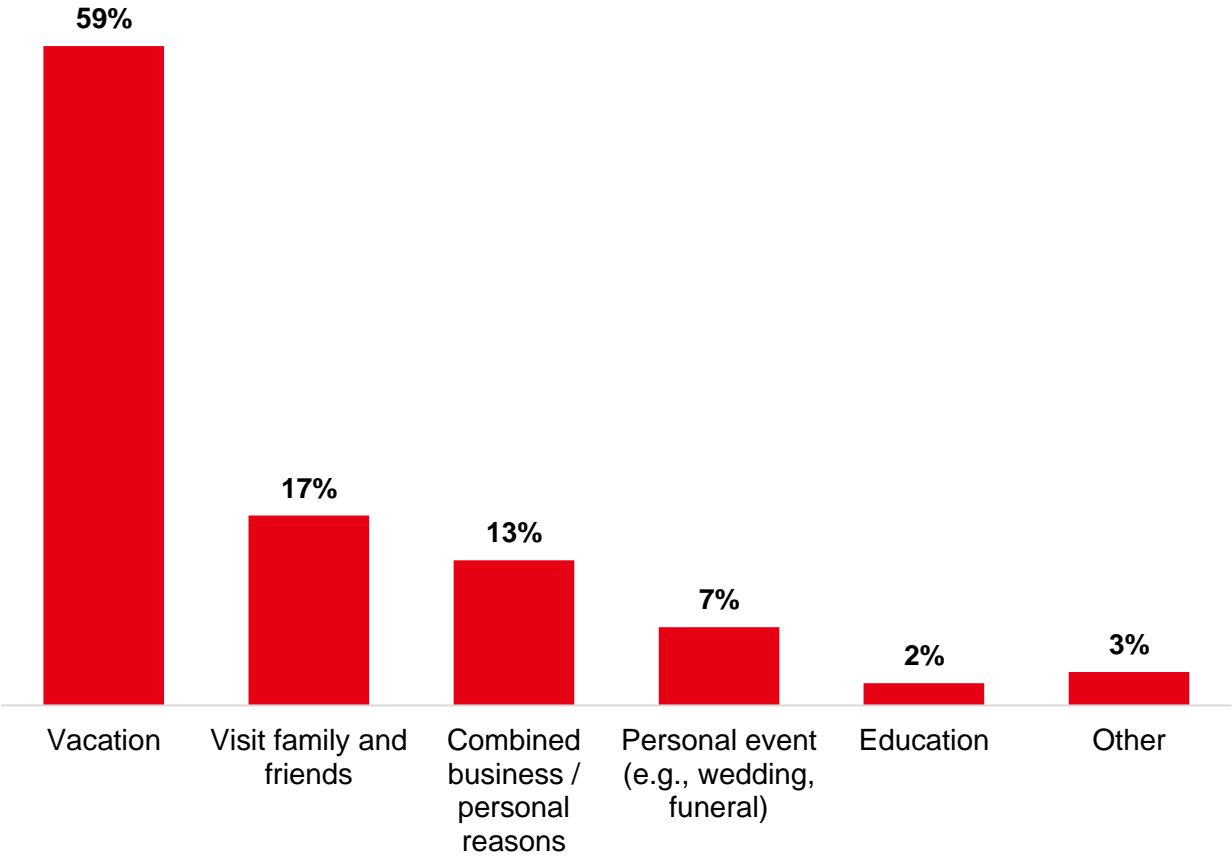
MOST RECENT TRIP



Le Pays de la Sagouine
New Brunswick



MAIN PURPOSE OF RECENT TRIP



Base: Out-of-state pleasure travellers (past 3 years or next 2 years), Travelled to Canada past 3 years (n=699)
F2. What was the main purpose of this trip? (Select one)



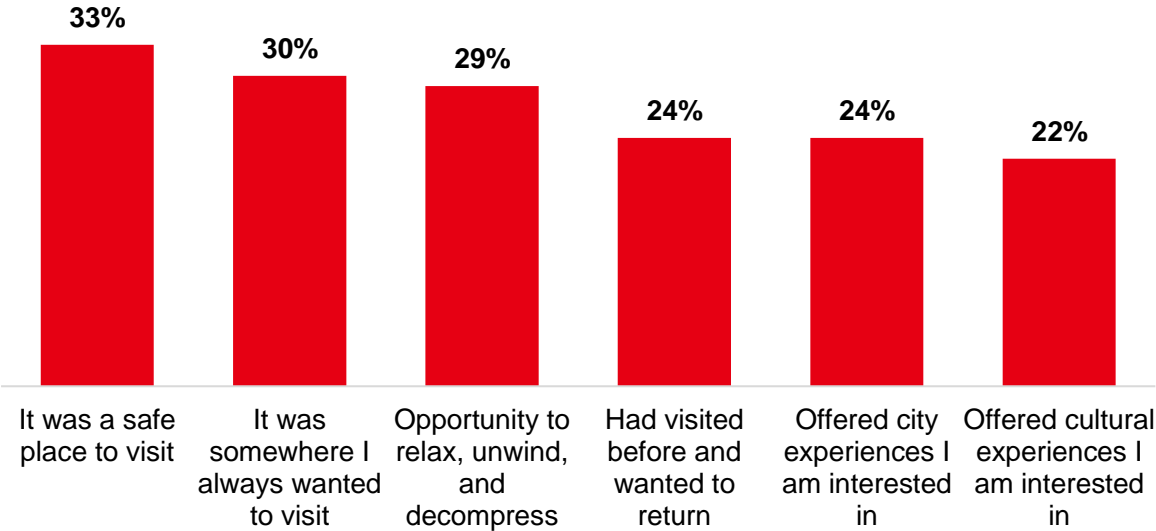
Nearly six in ten American travellers to Canada in the past three years were going on a vacation trip.



Nahanni National Park Reserves
Northwest Territories



FACTORS IN CHOOSING DESTINATION FOR RECENT TRIP (TOP 6)

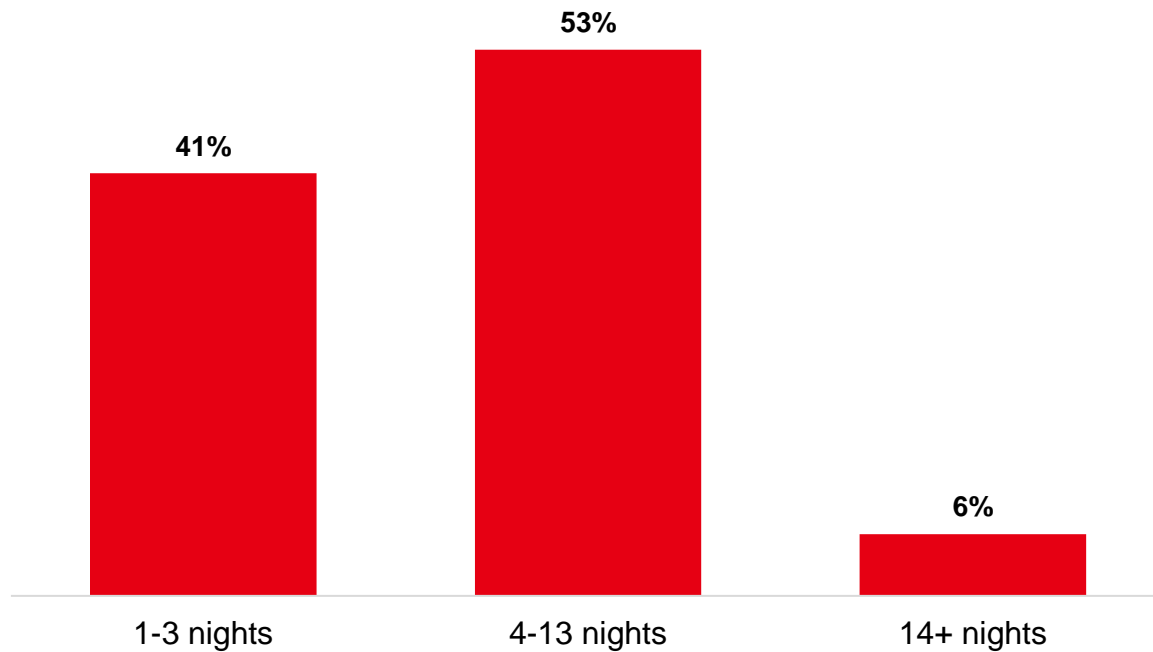


The top factors for choosing to visit Canada for their most recent trip were safety, the destination being somewhere they always wanted to visit, and to relax.

Base: Out-of-state pleasure travellers (past 3 years or next 2 years), Travelled to Canada past 3 years, Took a vacation (n=409)
F3. Which of the following factored into your choice of destination for this trip? (Select all that apply)



NIGHTS SPENT DURING RECENT TRIP



Base: Out-of-state pleasure travellers (past 3 years or next 2 years), Travelled to Canada past 3 years (n=699)
F4. How many nights did you spend in this destination?

More than one half of American travellers to Canada stayed for 4-13 nights.

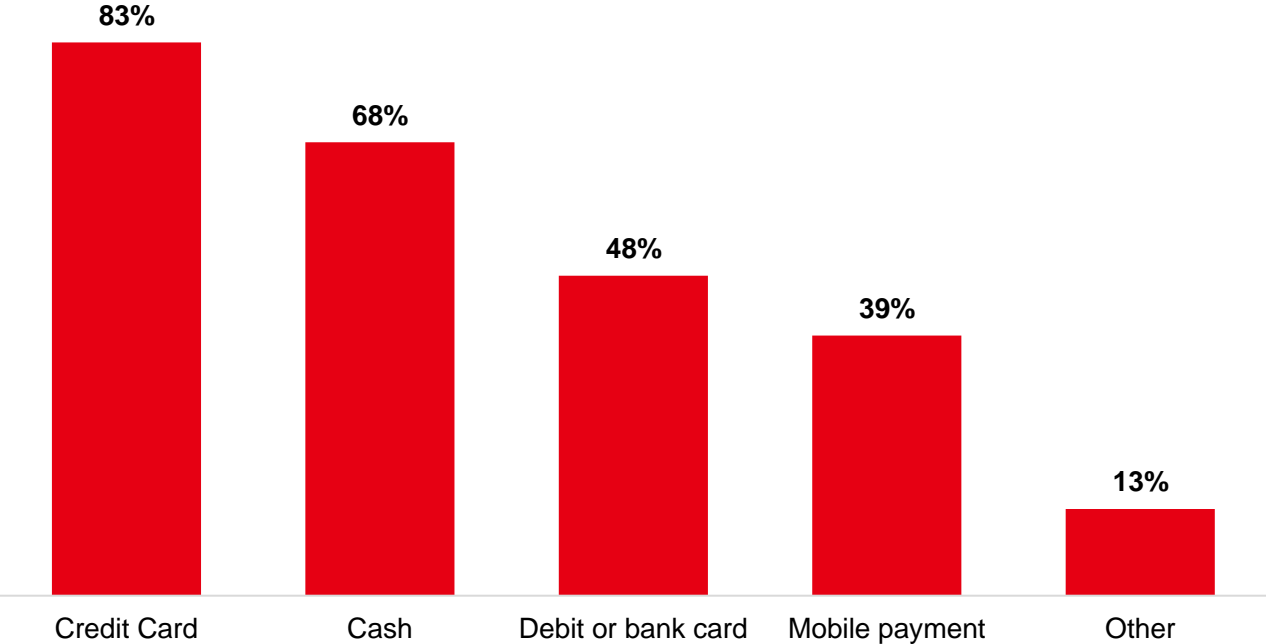


Barren Canyon, Algonquin Park
Ontario

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PAYMENT METHODS FOR RECENT TRIP: BY DESTINATION



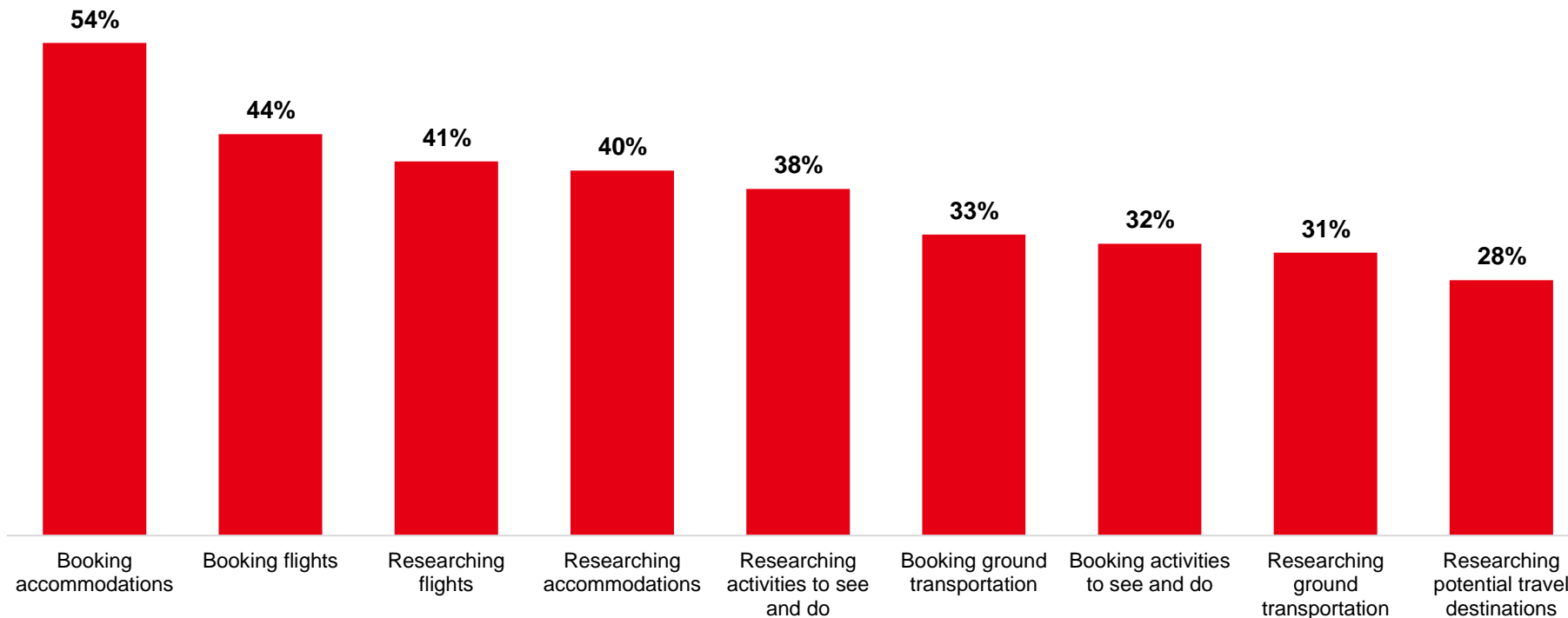
Base: Out-of-state pleasure travellers (past 3 years or next 2 years), Travelled to Canada past 3 years (n=699)
F8. Approximately what percentage of your purchases did you make during your trip with each of the following payment methods? Your best guess is fine. (Enter one number per row. Your total must add to 100%).

The most common payment method American travellers used for their most recent trip to Canada was a credit card, followed by cash.



TRAVEL AGENTS/TOUR OPERATOR USAGE FOR RECENT TRIP (AMONG THOSE WHO USED A TRAVEL AGENT/TOUR OPERATOR)

25% used a travel agent



One in four recent travellers to Canada used a travel agent, most likely for booking accommodations.

Base: Out-of-state pleasure travellers (past 3 years or next 2 years), Travelled to Canada past 3 years (n=699)

F9. Travel agents offer personalized service to help individuals, groups, and business travellers plan and organize their travel schedules, from purchasing tour packages to booking flights and hotels. Examples of travel agents include Collette Vacations or Liberty Travel, they do not include online booking engines like Expedia or Travelocity. Did you use a travel agent or tour operator to help you research or book your trip? (Select one)

Base: Out-of-state pleasure travellers (past 3 years or next 2 years), Travelled to any destination past 3 years, Used a Travel Agent/Tour Operator (n=174)

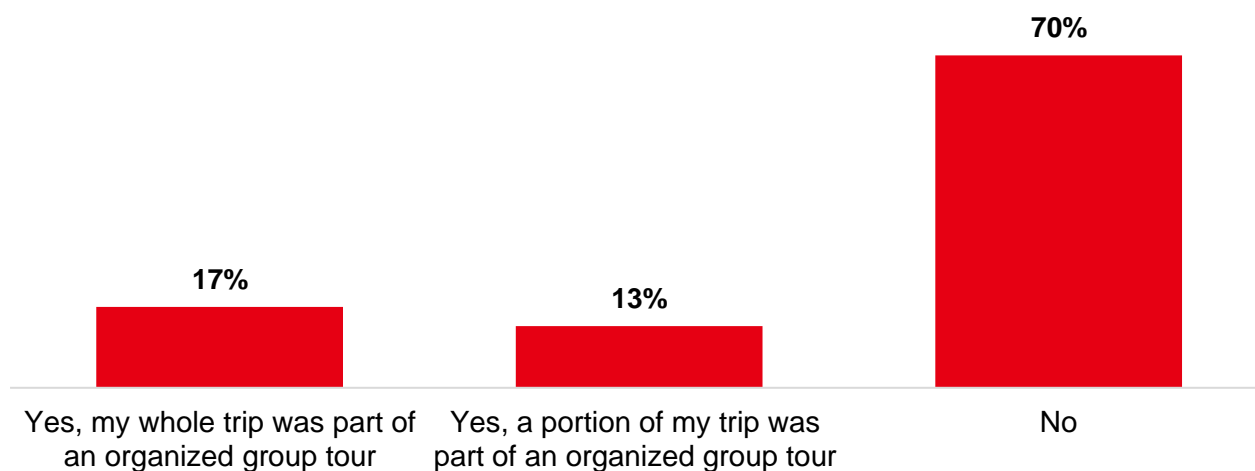
F10. Which of the following did a travel agent or tour operator help you with?

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Twin Falls Lodge
Saskatchewan



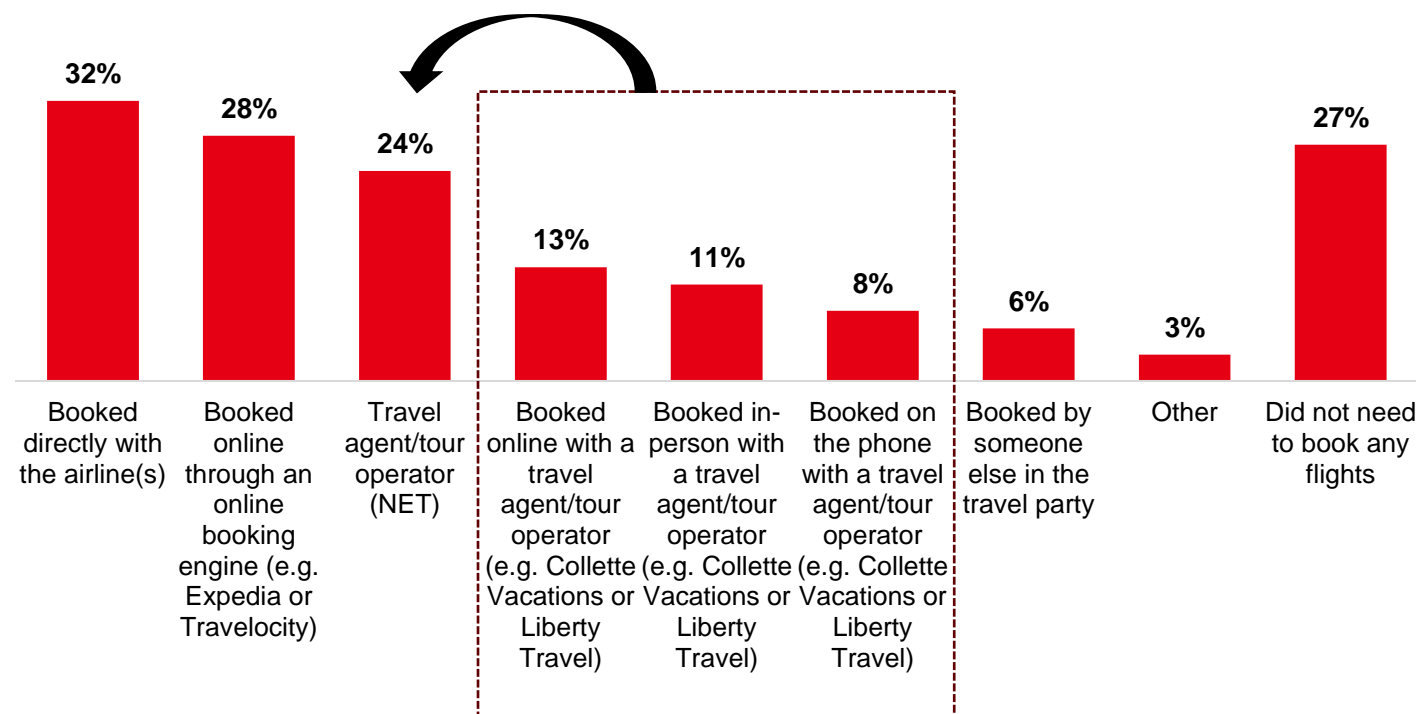
ORGANIZED GROUP TOUR FOR RECENT TRIP



Base: Out-of-state pleasure travellers (past 3 years or next 2 years), Travelled to Canada past 3 years (n=699)
F11. An organized group tour consists of a package where any combination of accommodation, transportation, food and/or activities are included as a multi-day itinerary. Did you travel as a part of an organized group tour on this trip?

Nearly two in ten travellers to Canada in the past three years used an organized group tour for their whole trip, and another one in ten used one for a portion of their trip.

BOOKING FLIGHTS FOR RECENT TRIP



Recent travellers to Canada were most likely to have booked flights directly with the airlines, followed by booking online through an online booking engine, and booking with a travel agent or tour operator.

Base: Out-of-state pleasure travellers (past 3 years or next 2 years), Travelled to Canada past 3 years (n=699)
F12. How did you book your flight for this trip? (Select all that apply)

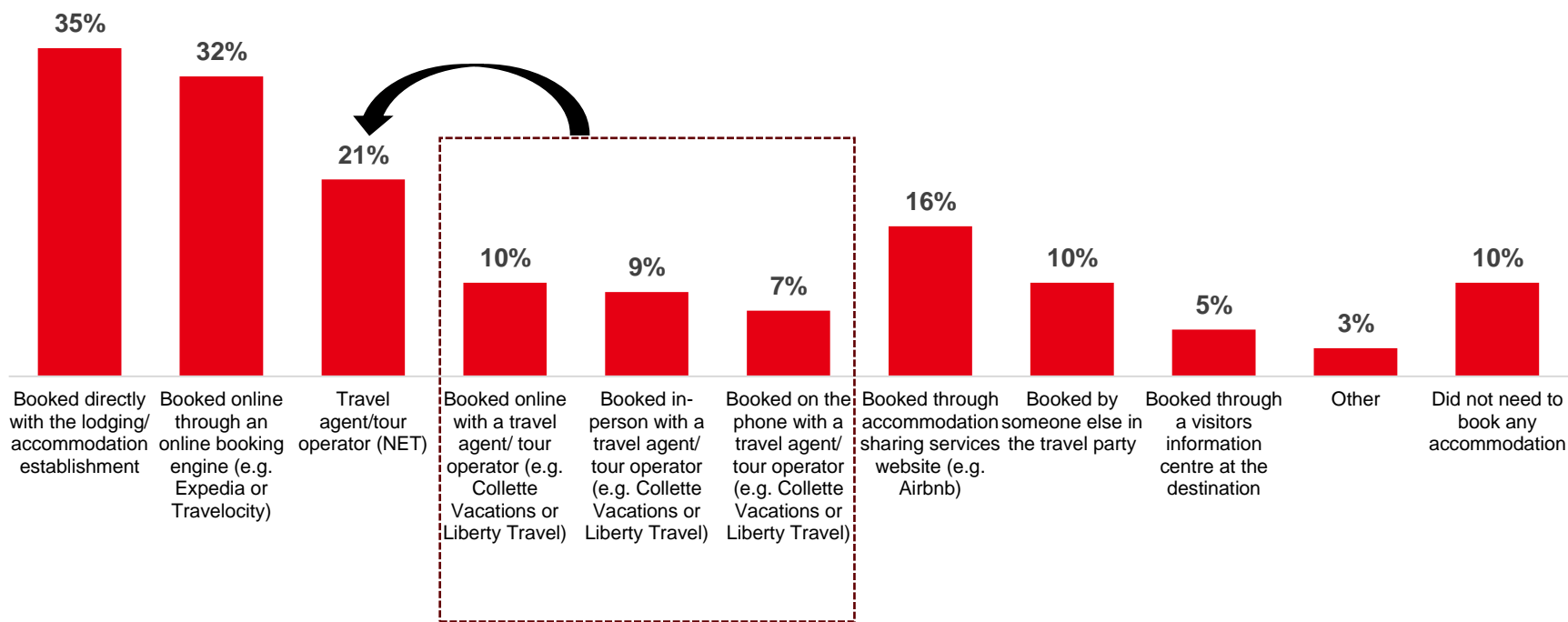


Montmorency Falls Park, Quebec City
Quebec

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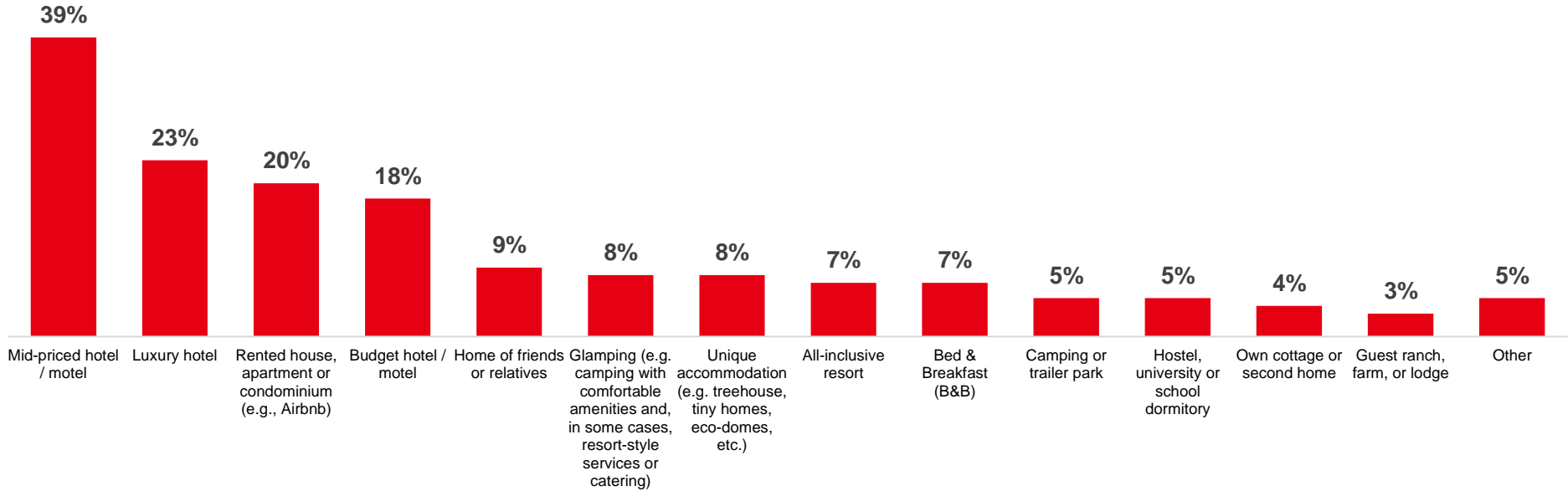
BOOKING ACCOMMODATIONS FOR RECENT TRIP



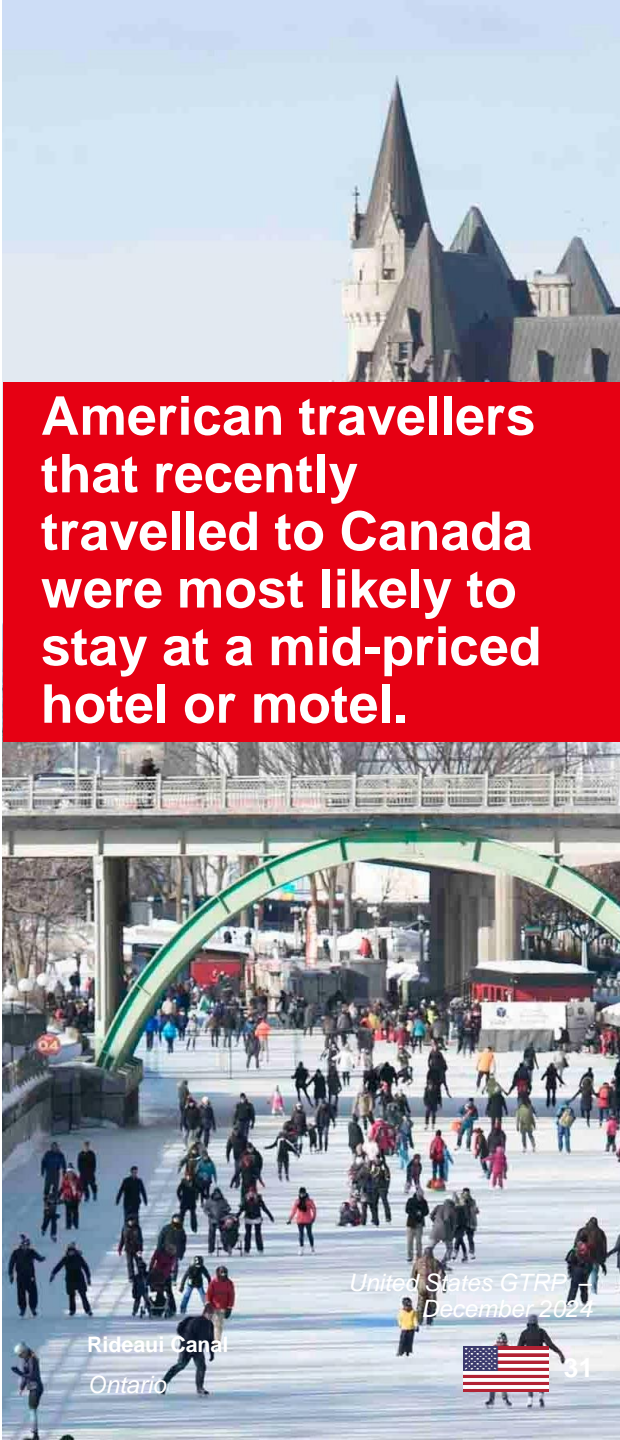
Booking directly with the establishment and booking through an online engine were the most popular ways to book accommodations.

Base: Out-of-state pleasure travellers (past 3 years or next 2 years), Travelled to Canada past 3 years (n=699)
F13. How did you book your accommodation for this trip? (Select all that apply)

TYPE OF ACCOMMODATIONS FOR RECENT TRIP



Base: Out-of-state pleasure travellers (past 3 years or next 2 years), Travelled to Canada past 3 years (n=699)
F14. Which type of accommodation did you stay in during this trip? (Select all that apply)



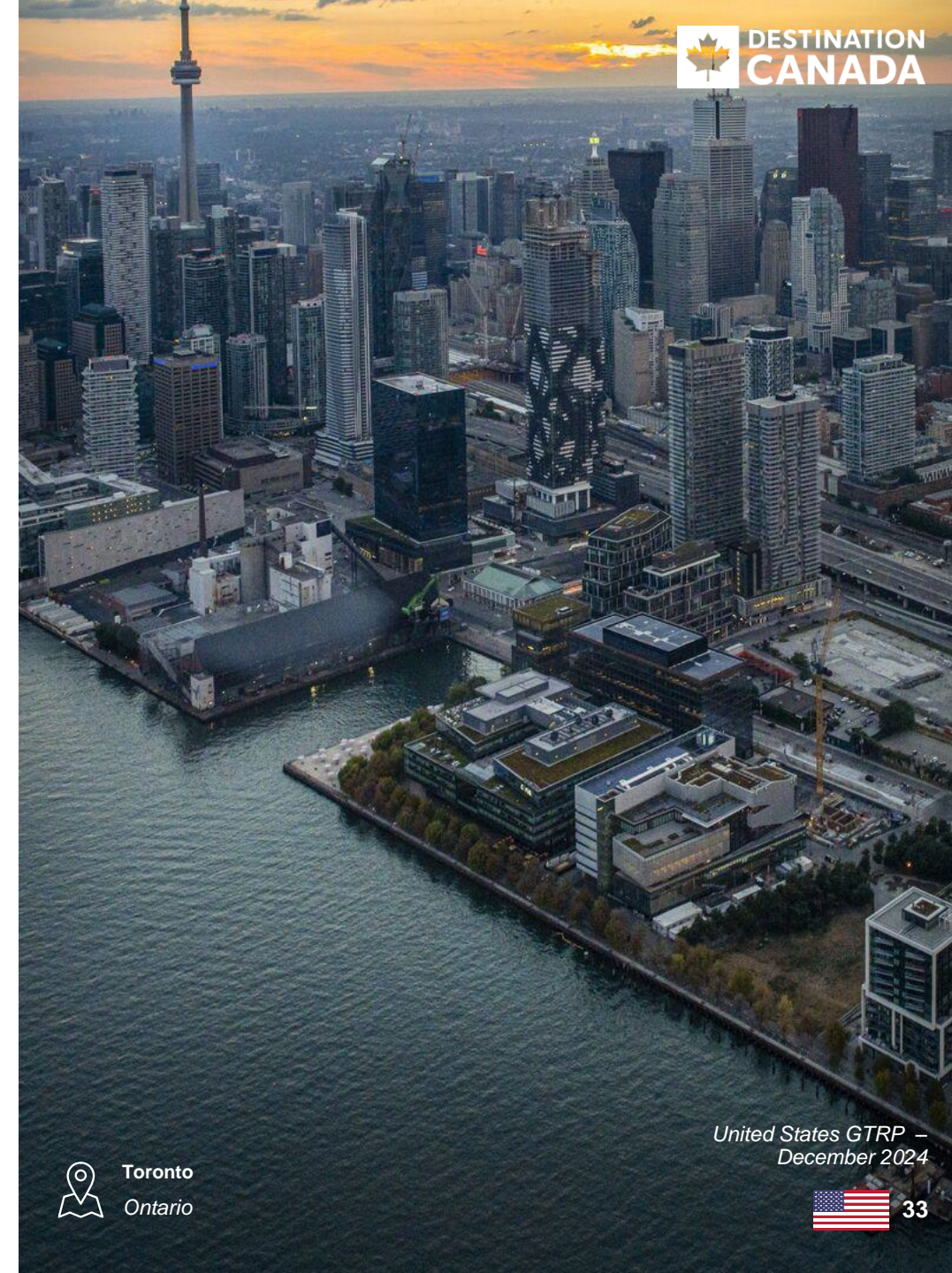
American travellers that recently travelled to Canada were most likely to stay at a mid-priced hotel or motel.

APPENDIX

DEFINITION OF REGIONS

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

- **Mid-Atlantic** = e.g. New York, Washington, D.C., New Jersey, Pennsylvania
- **Florida & the South** = e.g. North Carolina, South Carolina, Georgia, Louisiana, Tennessee, Virginia
- **Texas & the Southwest** = e.g. Arizona, Nevada, New Mexico, Utah
- **Midwest** = e.g. Illinois, Michigan, Minnesota, Ohio, Wisconsin
- **New England** = e.g. Massachusetts, Maine, Vermont, New Hampshire, Connecticut
- **Rocky Mountains** = e.g. Colorado, Idaho, Montana, Wyoming
- **Pacific Northwest** = e.g. Washington, Oregon



THANK YOU

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

