



DESTINATION  
CANADA

# Global Tourism Watch

2016 Canada Summary Report

**BALKAN**  
Charcuterie  
Artisanale  
Fabrication sur place  
• Sandwiches BBQ  
• Charcuterie  
• Grillades  
• Sandwiches  
• Epaves fines  
• Pâtisseries

**SANDWICHES**

# Table of Contents

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1. Introduction .....	1
Methodology.....	1
Background.....	2
2. Market Potential .....	3
3. Competitive Environment – Key Performance Indicators Summary .....	5
Consideration .....	6
Knowledge .....	6
4. Path-to-Purchase .....	7
Destinations .....	10
5. Vacation Activities .....	11
6. Barriers.....	14
7. Recent Trip Profile.....	15
Trip Purpose.....	15
Motivators.....	15
Travel Party.....	16
Booking .....	16
Type of Accommodation .....	17
8. Marketing Tactics .....	17
Sources Used to Look for Information .....	17
Resources, Devices Used to Plan Recent Trip.....	18

# 1. Introduction

Destination Canada began conducting the annual Global Tourism Watch (GTW) program in 2007. The primary purpose of this research program is to provide consumer-based intelligence in 12 core markets around the world: Australia, Brazil, China, France, Germany, India, Japan, Mexico, South Korea, the United Kingdom, the United States, and the domestic Canadian market.

The overall objectives of the GTW study are to:

- Monitor awareness, travel intentions, and other key market indicators for Canada and the regions;
- Assess perceptions of Canada and track brand performance against competitors over time;
- Identify the general experiences sought by travellers and identify growth opportunities;
- Identify motivators and barriers for travel to Canada; and,
- Determine the influence of various information sources on destination selection.

The GTW permits direct comparison of Canada to competing destinations in each market. Destination Canada has designated the following destinations as competitors in the Canadian market: the US, France, Italy, Spain, Netherlands, Germany, the UK, China, India, and Japan.

## Methodology

Data was collected via an online survey and has been weighted to represent the Canadian travel population. For this survey, trips are defined as travel to any destination outside of a respondent's own province, or region for Atlantic Canada. The target population for the online survey in the Canada was residents aged 18 years and older, who have taken an out-of-region pleasure trip where they had stayed at least 2 nights with a minimum or 1 night in paid accommodation in the past 3 years, or plan to take such a trip in the next year.

Data was gathered from 4,005 respondents in Canada, in December 2016. In the past, data has been gathered earlier in the year (April through July), which is prime planning season for summer travel to/within destinations such as Canada. It is believed the timing of data collection impacts results and the later field window this wave may be responsible for some shifts in Key Performance Indicators (KPIs).

## Figure 1.1: Study Overview: Canada Market

The target population are residents aged 18 years and older, who have taken an out-of-region pleasure trip 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.



## Background

Canada has the 10<sup>th</sup> largest global economy according to the IMF GDP Nominal ranking, with 2.1% share of global GDP (*International Monetary Fund, October 2016*).

Canada's GDP growth remains low in 2016 at 1.2%. It has been affected by a decline in international commodity prices, particularly for oil, and a slowdown in US economic activity (*OECD, November 2016*). In addition, the wildfires that hit Alberta in the second quarter of 2016, severely impacting oil output, added another blow to the Canadian economy.

Falling oil prices also had a negative impact on the Canadian dollar, which depreciated to \$0.71 US in January 2016, its lowest level in more than 12 years (*CBC News, January 2016*). At year close, the loonie fared only slightly better, trading at \$0.75 US. A similar trend is expected in 2017, with some analysts anticipating that the Canadian currency could fall below \$0.70 if trade barriers emerge with Canada's largest trading partner, the US (*Global News, January 2017*). However, a weaker Canadian dollar has benefitted the inbound tourism industry and many manufacturers.

Uncertainty following the US election and threats of re-negotiation or cancellation of the North American Free Trade Agreement (NAFTA) have significant implications for Canada-US trade and have weakened the Canadian economic outlook. The Canadian government is seeking to strengthen economic ties with other trade partners. As an example, the Canada-European Union Comprehensive Economic and Trade Agreement (CETA) is expected to create jobs, strengthen economic relations, and boost Canada's trade with the European Union once ratified in 2017 (*CBC News, October 2016*).

Despite the economic challenges experienced in 2016, Canada's economy is projected to rebound with GDP growing at an estimated 2.1% for 2017 (*OECD, November 2016*), driven by increasing oil prices, a recovering US market, and an expansionary fiscal policy. The federal government plans to keep interest rates low, at least until 2018, stimulating investment and consumption.

Inflation reached a low of 1.2% in November 2016, but is projected to rise to 2.1% in 2017, mainly due to higher consumer energy prices (*Bank of Canada, April 2017*). The unemployment rate is sitting at 7% in 2016, but is expected to decline moderately in 2017 (*International Monetary Fund, October 2016*). Consumer confidence was at 103.8 in December 2016 and is trending upwards, fueled by an improvement in economic outlook (*Conference Board of Canada, 2016*).

Canada's domestic travel spending increased by 0.4% in the final quarter of 2016. In the third quarter, total spending by foreign and domestic travellers increased by 2.2% and reached US\$16 billion. This percentage increase in total spending was the largest observed, in any quarter, since the second quarter of 1997. The growth in tourism could be attributed to the depreciation of the Canadian dollar, which made Canada more competitive as a travel destination for foreign visitors and deterred Canadians from travelling abroad. The trend is expected to continue into 2017 as Canada celebrates its 150<sup>th</sup> anniversary and has intensified tourism promotional activities for this occasion (*Reuters, January 2017*).

Canada is the 6<sup>th</sup> largest outbound tourism market in the world, accounting for US\$29 billion in spending in 2016, a figure unchanged from 2015 (*United Nations World Tourism Organization, April 2017*).

## 2. Market Potential

GTW data is used to estimate the size of the potential market for Canada. The table below provides an estimate of the size of the potential domestic market for Canada in two ways – the macro target market and the immediate potential market.

The domestic market size is derived from a 2016 omnibus study of the Canadian adult population. Note that the out-of-region market size was last calculated in 2010 and has increased by 1.5 million. This rise is explained by an overall increase in the incidence of out-of-region travellers from 64% in 2010 to 69% in 2016. Out-of-region travel incidence is comprised of travellers who indicate that they have travelled for a out-side of their province or region for a pleasure trip in the past three years, or intend to do so in the next year. The incidence of past three year travel has increased since 2010 (from 56% to 63%) and the next year outlook for long-haul travel has also increased (from 49% to 50%).

The proportion of GTW respondents who are in the dream to purchase stages for Canada (87%) is used to calculate a target market estimate of 15 million.

The immediate potential is a more conservative estimate based on GTW respondents who say they are definitely or very likely to travel within Canada, but beyond their own province/region, in the next year. This translates into a market of 8.73 million travellers with more immediate potential for conversion.

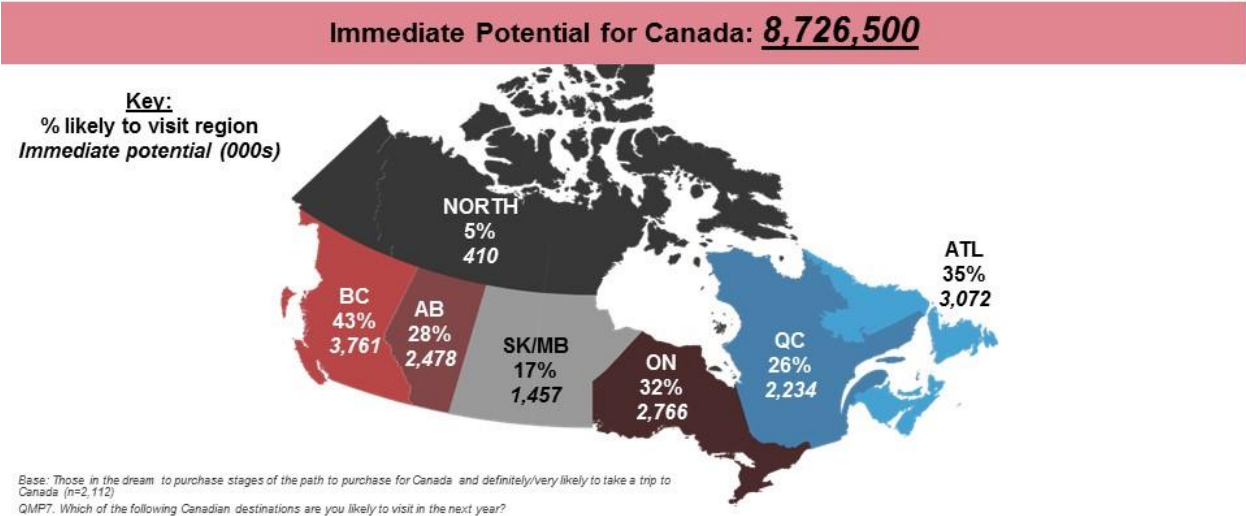
Figure 2.1: Size of Potential Market for Canada (Next Year)

Measure	Size of Potential Market to Canada
Out-of-region pleasure travel market	17.25 million
Target market for Canada (dream to purchase stage)	87%
Size of the target market	15.03 million
Immediate potential for Canada (definitely/very likely to visit in next year)	58%
Immediate potential	8.73 million

Base: Target market for Canada = out-of-region pleasure travellers (past 3 years or next year) (n=4,005); Immediate potential for Canada = dream to purchase stages for P2P for Canada (n=3,507)  
 QMP1. Which of the following best describes your current situation when thinking about each of the following destinations for a vacation trip?  
 QMP6. Realistically, how likely are you to take a vacation trip within Canada [beyond your own province / Atlantic Canada] in the next year?

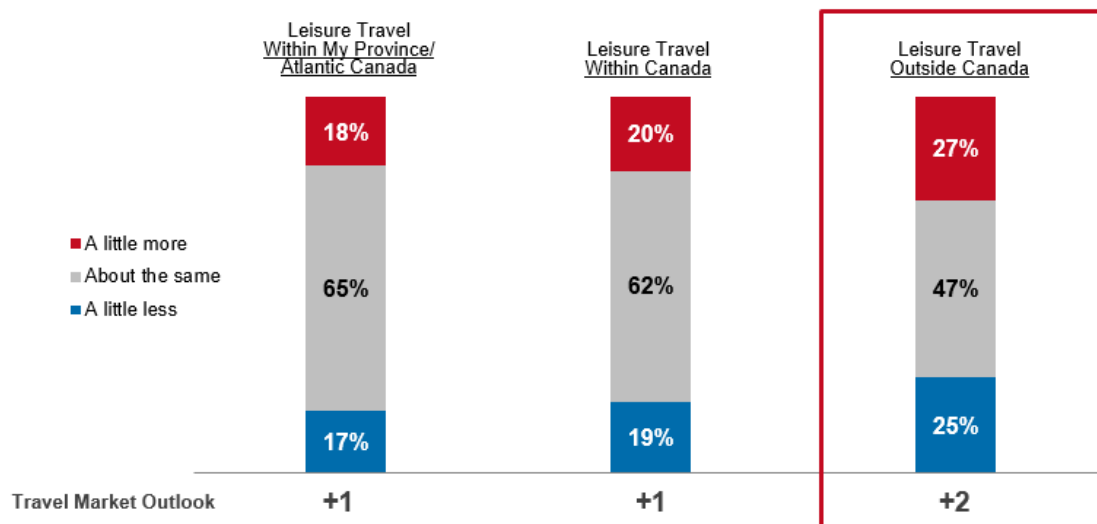
Also of note is the demonstrated interest in Canada’s regions among the Immediate Potential market (8.73 million). BC holds the greatest appeal (43% or 3.8 million potential visitors) followed by Ontario (32% or 2.8 million potential visitors), with Alberta and Quebec appealing to just over one-quarter of potential visitors (2.5 and 2.2 million potential visitors, respectively).

Figure 2.2: Potential Market Size for the Regions



Regardless of destination, the proportion of Canadian travellers saying they will spend less on leisure travel in the next year is marginally lower than those saying they will spend more. This results in slightly positive travel outlooks for travel within their own province/region (+1), travel within Canada, but beyond their own province/region (+1), and international travel outside of Canada (+2).

Figure 2.3: Spending Intentions (in the Next 12 Months)



Base: Out-of-region pleasure travellers (past 3 years or next year) (n=4,005)  
 QS2. How would you describe your spending intentions on the following items in the next 12 months, compared to the last 12 months? Will you spend ...?

### 3. Competitive Environment – Key Performance Indicators Summary

The outlook for domestic tourism is favourable. Out of the eleven competitive destinations that respondents were asked to evaluate, Canada is first on aided consideration, and tied for top spot with the US on unaided consideration.

The GTW tracks the following Key Performance Indicators (KPIs) for Canada: unaided and aided destination consideration, and aided destination knowledge. Canada’s performance is tracked against key competitors. The competitive set was updated for 2016 to reflect actual travel patterns from each market. The countries included represent 95% of the outbound travel volume to destinations which are considered direct competitors to Canada (e.g., non-beach destinations). For Canada, these destinations are the US, France, Italy, Spain, Netherlands, Germany, the UK, China, India, and Japan. Germany, India, Japan, Spain, and Netherlands were not in the competitive set previously. It is also important to note that 2016 data was collected in December versus earlier in the year (April to July) in previous years. Seasonality may have impacted KPI results this year, although it is impossible to know how much the results might have been affected.

## Consideration

Unaided consideration represents top-of-mind presence of destinations in the consumer mindset and requires travellers to think of destinations without being prompted. Unaided consideration indicates that a strong impression has rooted in the mind of a traveller for a destination. From a marketing perspective, travellers who have Canada on their unaided consideration list may be easier to attract since they are actively thinking of Canada as a travel destination. On an unaided basis, 34% of Canadian travellers mentioned Canada as a destination under serious consideration in the next year, not surprisingly ranked first (along with the US). Unaided mentions of Canada were consistent across all age groups.

Aided consideration represents the proportion of travellers who say they would seriously consider visiting a destination, but only after they are prompted with a list of competitive destinations. Travellers who have aided consideration for Canada may not be thinking of Canada top-of-mind, but they are considering a visit. Continued prompts and cues through marketing efforts could help move these considerers down the Path to Purchase. On an aided basis, Canada fares even better with 59% saying they are seriously considering Canada for a leisure trip in the next year, slightly ahead of 2<sup>nd</sup> place US (55%), but far higher than any other competitor including 3<sup>rd</sup> place United Kingdom (16%). Of note, Canada does not see any significant differences among age groups.

## Knowledge

The aided destination knowledge KPI (previously called aided awareness, but changed for clarity purposes) measures knowledge of travel opportunities in each destination. Fifty-five percent of all Canadian travellers rate their knowledge of travel opportunities in Canada as either excellent or very good. Additional efforts to boost knowledge of Canadian travel opportunities could help to move potential visitors along the path-to-purchase. Older travellers aged 55+ indicate a significantly higher level of knowledge (59%) compared to younger travellers aged 18-34 (52%) and travellers aged 35-54 (53%).

Figure 3.1: Key Performance Indicators

Key Performance Indicators (KPIs) for Canada – Summary				
Indicator	Definition	All Out-of-Region Travellers (n=4,005)	Recent Travellers Within Canada <sup>1</sup> (n=1,922)	Considering Canada <sup>2</sup> (n=2,560)
<b>Intentions:</b>				
Unaided destination consideration	% who mentioned Canada or a destination in Canada on their consideration list <sup>3</sup>	34%	46%	46%
Competitive positioning on aided destination consideration	Rank on the consideration list among 11 destinations	1	1	1
<b>Destination knowledge:</b>				
Aided awareness of travel opportunities in Canada	% with excellent/very good knowledge of travel opportunities in Canada	55%	65%	63%

<sup>1</sup> Travelled Canada in the past 3 years (pleasure trip of 2 or more nights, with 1 or more nights in paid accommodations).

<sup>2</sup> Those in the consider to purchase stages of the path to purchase for Canada.

<sup>3</sup> For trips in the next year.

Base: Out-of-region pleasure travellers (past 3 years or next year)

Q58. You mentioned that you are likely to take a vacation trip of 2 or more nights outside of [your own province/Atlantic Canada] in the next year. Which destinations are you seriously considering for your trips in the next year? (Please list up to 3 destinations.)

Q5VC1. You may have already mentioned this before, but which destinations would you seriously consider visiting in the next year?

Q1MP3. How would you rate your level of knowledge of vacation opportunities in each of the following destinations (asked only for destinations in consideration set)?



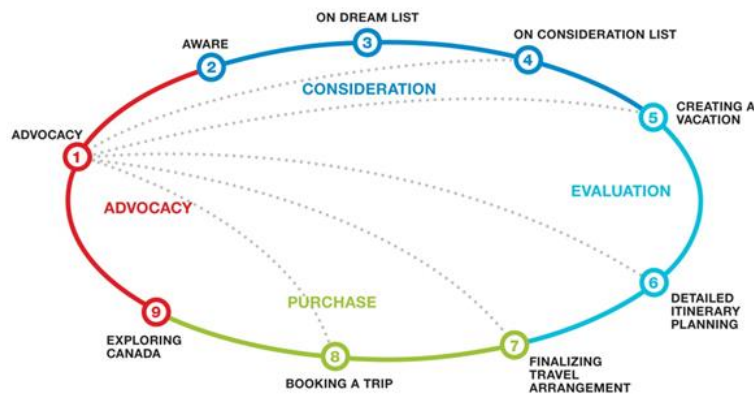
## 4. Path-to-Purchase

Like any other expensive and discretionary consumer product, there is a purchasing or decision-making cycle associated with long-haul travel: consumers move through progressive stages from not knowing anything about a destination to booking a trip.

Through additional research, Destination Canada has developed a nine stage Path-to-Purchase (P2P) model for long-haul travel, starting with awareness of the opportunity and interest in a destination, through to planning an itinerary, and booking travel and accommodations. The final stage, advocacy, happens during and after the actual visit.

Destination Canada wants to understand where the organization can have the greatest influence in converting those with interest in Canada to actual visitors.

Figure 4.1: DC's Path-to-Purchase Model



In addition to looking at individual stages of the P2P, Destination Canada has identified phases travellers move through in the purchase cycle. Key phases are defined below and are referenced throughout this report.

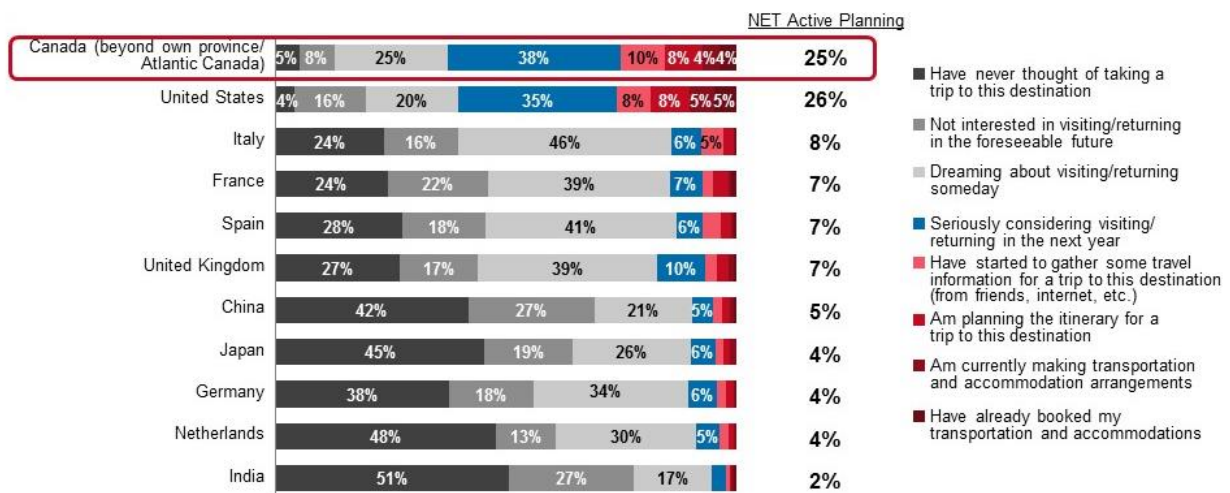
Figure 4.2: DC's Path-to-Purchase Model

<b>Unaware</b>	Have never thought of taking a trip to this destination	
<b>Aware</b>	Not interested in visiting/returning in the foreseeable future	
<b>On Dream List</b>	Dreaming about visiting/returning someday	] Dream to Purchase
<b>On Consideration List</b>	Seriously considering visiting/returning in the next 2 years	
<b>Creating a Vacation Movie</b>	Have started to gather some travel information for a trip to this country	] Consider to Purchase
<b>Detailed Itinerary Planning</b>	Am planning the itinerary for a trip to this country	
<b>Finalizing Travel Arrangements</b>	Am currently making transportation and accommodation arrangements	] Active Planning
<b>Booking a Trip</b>	Have already booked my transportation and accommodations	

In looking at results for Canada, 25% of Canadian travellers are actively engaged in planning a domestic trip, and an additional 38% are seriously considering a trip. Women are more likely than men to be dreaming of taking a domestic trip (28% for women versus 21% for men). Older travellers aged 55+ are significantly more likely to be seriously considering a trip within Canada, beyond their own province/region, than any other age group.

Similar to their interest in domestic destinations, 26% of Canadian travellers have plans to visit the US, while 35% are considering a visit to the US within the next year. The similar levels for domestic and US travel underscore the strong interest and follow-through for travel within North America. While active planning for travel outside of North America is significantly lower than within the region, popular destinations in Europe (the UK, Italy, Spain, and France) have strong aspirational appeal with approximately 40% of travellers at the dreaming stage for each destination. Other destinations in Europe (Germany and the Netherlands) and Asia (India, China, and Japan) hold less appeal for Canadian travellers with more than half saying they are not interested in visiting or have never thought of taking a trip to each destination.

Figure 4.3: Stage in the Purchase Cycle by Country



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

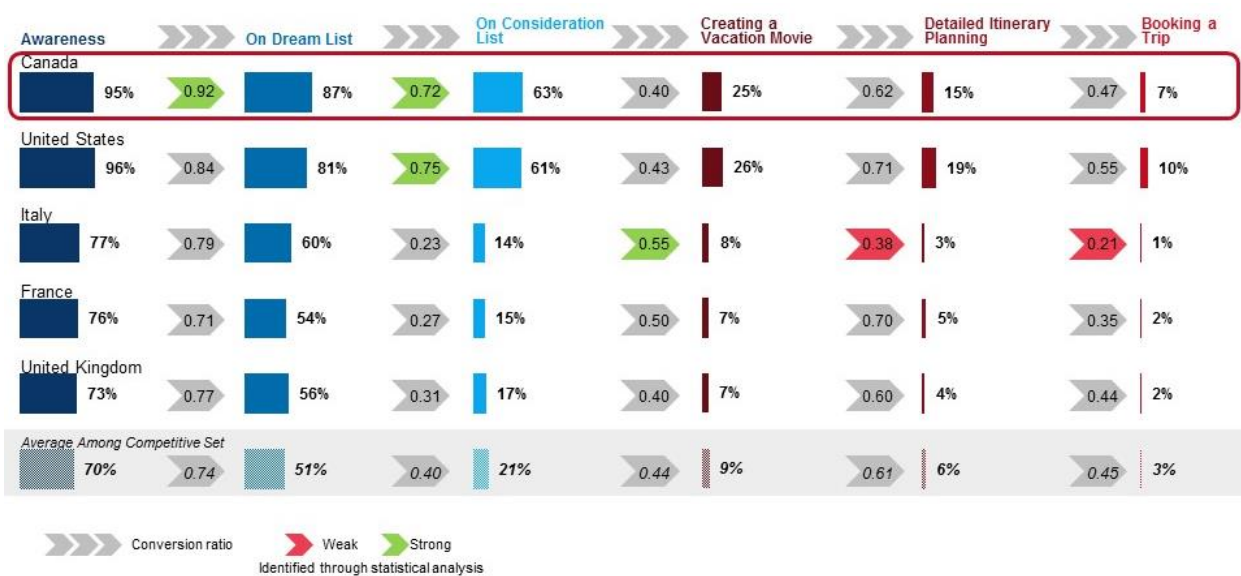
Getting travellers to move through the purchase cycle to booking a trip is critical. The charts below show Canada’s progress converting travellers at crucial steps in the purchase cycle relative to top competitors (determined by past 3-year visitation) and other destinations in the competitive set. For reference, also shown is the average across the entire competitive set. ‘Strong’ and ‘weak’ conversion ratios were derived through statistical analysis, specifically if a conversion ratio is greater than one standard deviation from the average, then it is considered ‘strong’ and if a conversion ratio is lower than one standard deviation from the average, then it is marked as ‘weak’.

Canada is performing above average in converting those who are aware of domestic travel opportunities to the dreaming stage. Canada remains strong at moving those on the dream list to consideration, similar to the US, but loses momentum at the creating a vacation movie stage (where Italy is relatively stronger). Since this stage is focussed on information gathering, ensuring Canadian travellers can find the information they seek is paramount. The key to helping prospective visitors move further along in the purchase cycle is to provide information which presents a full picture of what a trip within Canada could look like e.g., a focal point to anchor a trip or itinerary suggestions.

At the final stage, booking a trip, Canada has converted 7% of domestic travellers into actual visitors, well above France (2%), the UK (2%), and Italy (1%). However, the US is ahead of all other destinations, converting 10% of prospective visitors to actual visitors.

For context, the US recorded 20.7 million overnight arrivals from Canada in 2015, while the UK saw 1.2 million, France welcomed 1.1 million, and Italy logged 469,000.<sup>1</sup> Overnight trips by Canadian travellers to the US declined by 10% in 2015. This may be connected to the decline in value of the Canadian dollar and therefore may represent an opportunity for increased domestic travel.<sup>2</sup>

Figure 4.4: Path-to-Purchase Conversion – Top Competitors

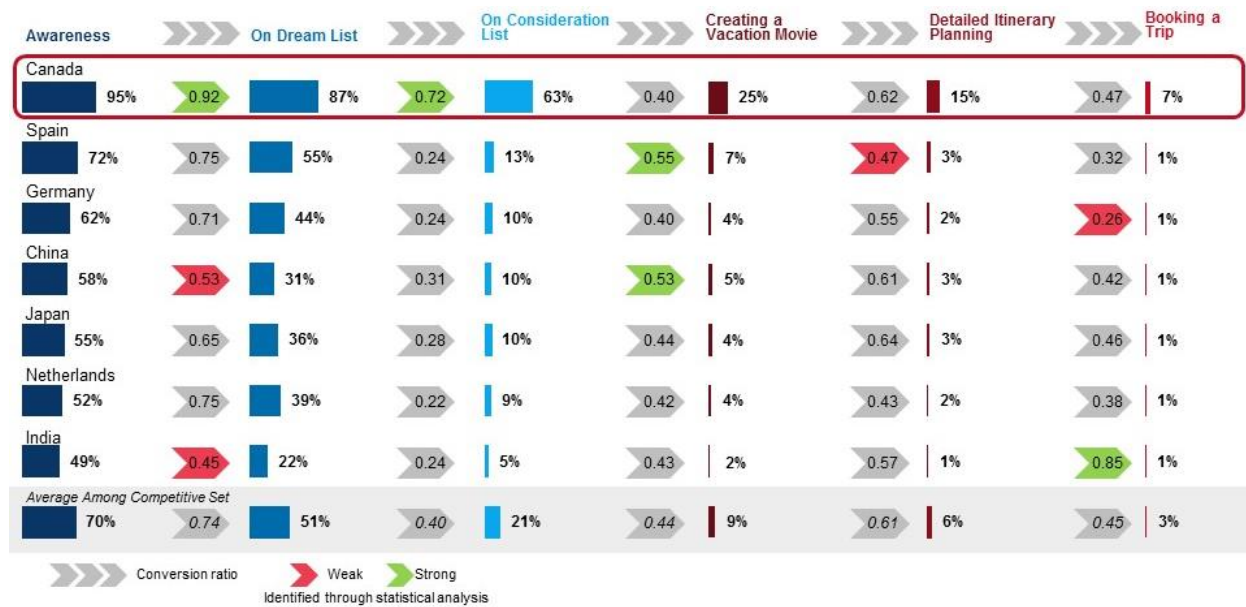


Examining purchase cycle results for destinations visited less frequently by Canadian travellers is also informative. Most notably, India is a strong performer at the final stage, seeing conversion ratios between detailed itinerary planning and actual booking far above average, outperforming even the US at this stage. However, it is possible that India's strength at this stage is largely driven by travel to visit family and friends.

<sup>1</sup> Statistics Canada, Culture, Tourism and the Centre for Education Statistics.

<sup>2</sup> Statistics Canada.

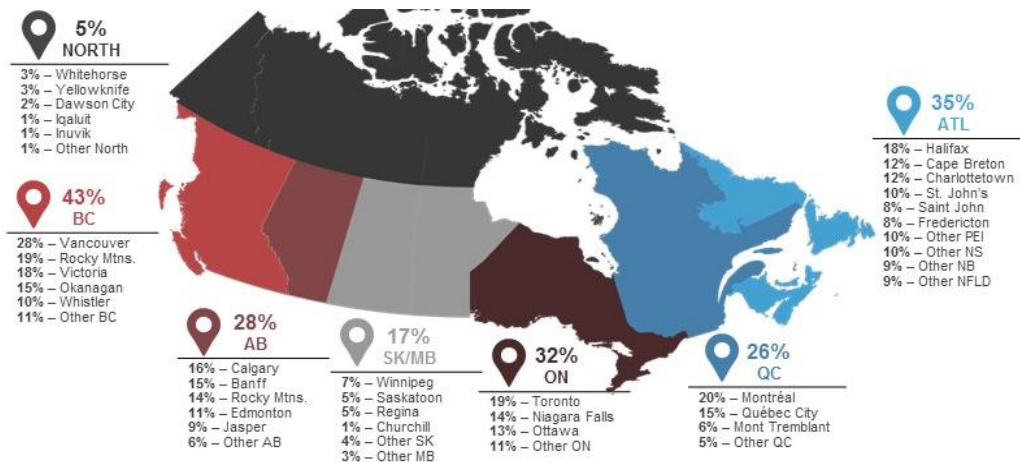
Figure 4.5: Path-to-Purchase Conversion – Rest of Competitors



## Destinations

Canadian travellers in the dream-to-purchase stages and indicating they are definitely/very likely to travel domestically in the next year were asked which parts of the country they would likely visit. British Columbia is the most popular province (cited by 43%) followed by Atlantic Canada (35%). The most popular destinations are Canada's three largest cities - Vancouver (28%), Montreal (20%), and Toronto (19%). The Rocky Mountains, from both the British Columbia side (19%) and Alberta side (14%) are also quite popular. Halifax (18%) and Victoria (18%) are the next most popular city destinations, while Banff and the Okanagan (15%) are other popular destinations.

Figure 4.6: Canadian Destinations Likely to Visit (Among those definitely/very likely to visit)



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=2,112)  
 QMP7. Which of the following Canadian destinations are you likely to visit in the next year?  
 QMP7a-g. Within [province/region], which travel destinations are you likely to visit?

An additional question asked potential visitors to identify the one Canadian destination holding the greatest appeal. The Rocky Mountains, selected by 9% of potential visitors, is clearly the top attraction, followed by Niagara Falls (6%). The top cities are Vancouver (picked by 8%) followed by Montreal (6%), and Toronto (5%). This would suggest Canada's landscape-based icons hold similar appeal to domestic travellers as city destinations.

Figure 4.7: Most Appealing Canadian Destination – Top 10 Mentions

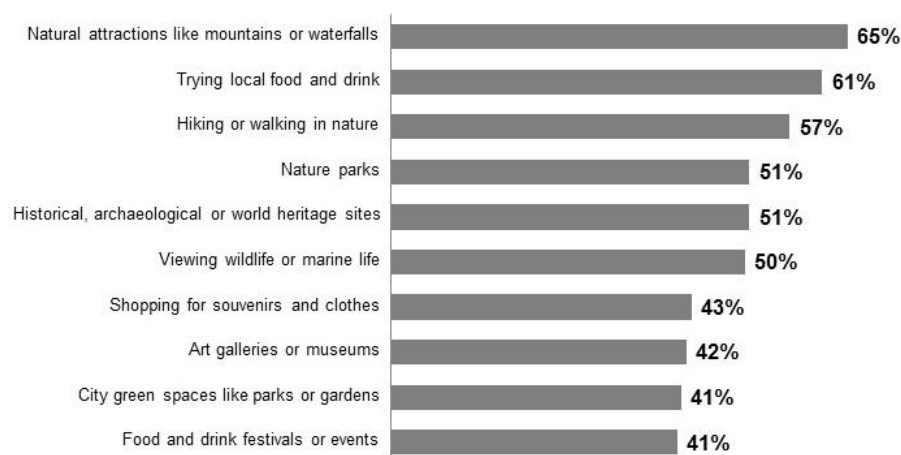


## 5. Vacation Activities

Canadian travellers were asked about which activities and experiences they seek while on holidays in general, regardless of the destination. Natural attractions like mountains and waterfalls were the most sought-after holiday experience. A close second is the chance to sample local cuisine and drink. These are followed by other outdoor activities such as hiking or walking in nature, visiting nature parks, viewing wildlife or marine life, as well as visits to historical, archaeological or world heritage sites. While older travellers aged 55+ are more interested in natural attractions and historical, archaeological or world heritage sites, they are less interested in food and drink festivals, nature parks, and shopping for souvenirs and clothes. Younger travellers aged 18-34 are more interested in hiking or walking in nature than those aged 35+.

These results bode well for Canada, which can offer the full range of outdoor and culinary experiences domestic travellers say they seek.

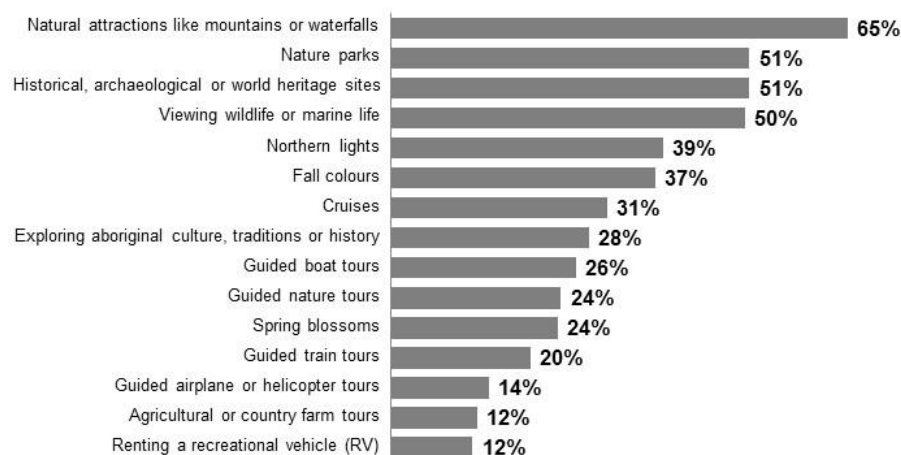
**Figure 5.1: General Activities/Places Interested In – Top 10**



Base: Out-of-region pleasure travellers (past 3 years or next year) (n=4,005)  
QMP10. In general, what activities or places are you interested in while on vacation?

In terms of things to see and do, Canadian travellers are most interested in natural attractions like mountains or waterfalls (65%). They also show strong interest in visiting nature parks (51%), visiting historical, archaeological or world heritage sites (51%), and viewing wildlife (50%). Older travellers aged 55+ are more interested in natural attractions and historical sites, and less interested in nature parks, the Northern lights, guided airplane tours, agricultural tours, and renting a RV. Younger travellers aged 18-34 are the most interested in the Northern lights and renting a RV.

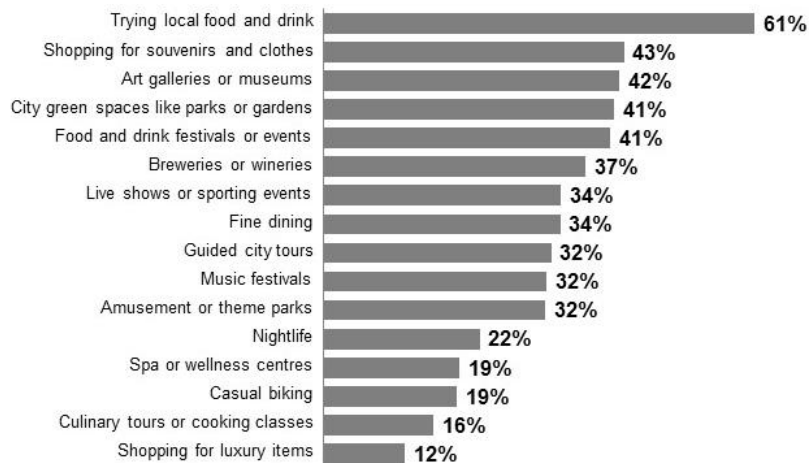
**Figure 5.2: General Activities/Places Interested In – Things to See & Do**



Base: Out-of-region pleasure travellers (past 3 years or next year) (n=4,005)  
QMP10. In general, what activities or places are you interested in while on vacation?

Among city activities specifically, trying local food and drink holds the greatest appeal by far for Canadian travellers (61%). The next most frequently selected city activities are shopping for souvenirs and clothes (43%), visiting art galleries or museums (42%), city green spaces like parks and gardens (41%), and food and drink festivals or events (41%). Some city activities, such as trying local food and drink and guided city tours, are of more interest to older travellers aged 55+. Other activities are of more interest to younger travellers aged 18-34, such as food and drink festivals or events, fine dining, music festivals, amusement parks, nightlife, spas, culinary tours or cooking classes, and shopping for luxury items.

**Figure 5.3: General Activities/Places Interested In – City Activities**



Base: Out-of-region pleasure travellers (past 3 years or next year) (n=4,005)  
 QMP10. In general, what activities or places are you interested in while on vacation?

In terms of outdoor activities, Canadian travellers are most interested in hiking or walking in nature (57%). With significantly less mentions, camping (33%), kayaking, canoeing or paddle boarding (25%), and ziplining (20%) are the next most frequently cited outdoor activities. With the exception of golfing, older travellers aged 55+ are least interested in outdoor activities while younger travellers aged 18-34 are the most interested.

**Figure 5.4: General Activities/Places Interested In – Outdoor Activities**



Base: Out-of-region pleasure travellers (past 3 years or next year) (n=4,005)  
 QMP10. In general, what activities or places are you interested in while on vacation?

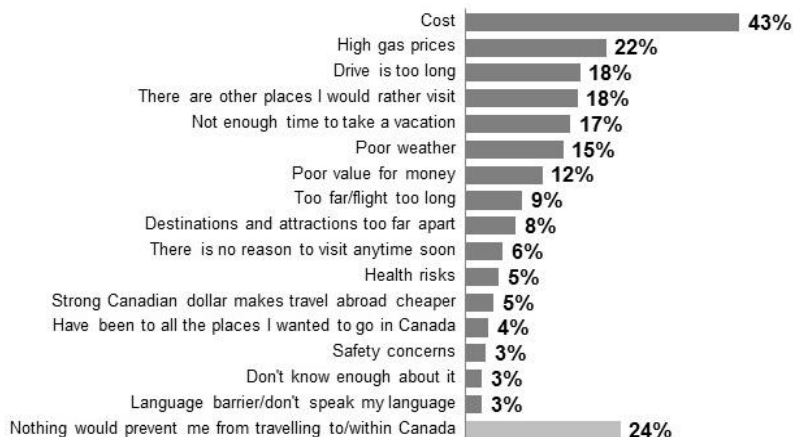
## 6. Barriers

All Canadian travellers were asked what could prevent them from travelling within Canada. Cost is the primary deterrent, cited twice as often as the next closest impediment, high gas prices. While cost is the top barrier across all age groups, travellers aged 18-54 are most likely to mention it. They are also more likely to feel that the drive or flight is too long, that they don't have enough time to take a vacation, that Canada offers poor value for money, and that there are other places they would prefer to visit. Time and driving distance are particularly acute factors for younger travellers aged 18-34. Relative to adult only households, travel parties containing children are more concerned about cost, high gas prices, long drives and flights, and not having the time to spend on vacation. Of note, 24% of Canadian travellers say that nothing would prevent them from travelling domestically, with older travellers aged 55+ most likely to express this sentiment.

While the cost barrier is challenging to address, it can be indirectly dispelled through messaging about the value offered by a Canadian vacation experience. Building the perception of Canada as delivering on the key drivers is critical to increasing interest in domestic travel, regardless of cost. Emphasizing the ability to anchor a trip to specific regions/experiences rather than having to see the whole country, or that you don't have to see the whole country all at once, could help counter the notion that the drive is too long or that there is not enough time to take a vacation.

Younger travellers aged 18-34 represent the best immediate opportunity as they are farther along the path-to-purchase and represent a larger lifetime value opportunity. Attracting younger Canadian travellers will require improving perceptions around the time required and the value offered by domestic travel. Older travellers aged 55+ also have potential as they are most likely to not have any barriers to visiting Canada, but more effort would be required to move them from the consideration stage to the evaluation stage. From a strategic marketing viewpoint, destinations could consider focusing tactical efforts on younger travellers in collaboration with partners, and split branding awareness efforts between the younger and older generation.

Figure 6.1: Key Barriers for Travelling Within Canada

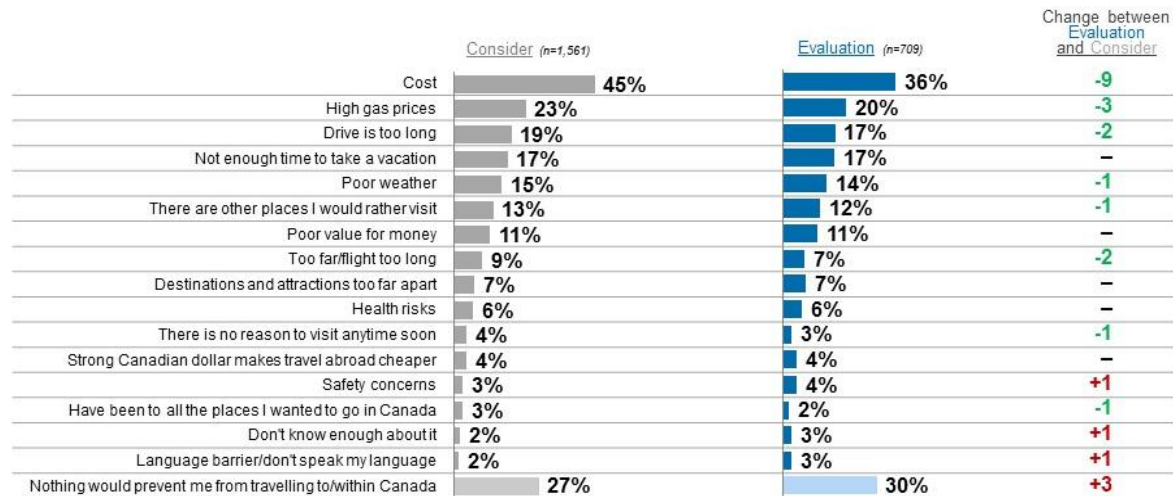


Base: Out-of-region pleasure travellers (past 3 years or next year) (n=4,005)  
 QMPS. Which of the following reasons might prevent you from travelling within Canada?



Examining barriers at key path-to-purchase stages provides some additional insight. Generally, those in the considering stage and those in the evaluation stage (gathering information or planning a visit) cite the same barriers in the same order. The main difference is that while those at the evaluation stage continue to mention cost as the primary barrier, it is to a lesser degree (-9).

Figure 6.2: Key Barriers for Travelling Within Canada – by Path-to-Purchase Segments



Base: Out-of-region pleasure travellers in specific path-to-purchase segments QMP9. Which of the following reasons might prevent you from travelling within Canada?

## 7. Recent Trip Profile

The following section provides details on the most recent out-of-region trip taken by Canadian travellers to competitive set destinations in the past 3 years (83% took such a trip). If the most recent trip encompassed more than one destination, the data reflects where the most time was spent.

### Trip Purpose

The primary reason for travelling among all Canadian travellers was for holiday purposes (cited by 58% of all travellers). Among those travelling within Canada, 49% cited holiday as the primary purpose, but a substantial number (34%) mentioned visiting friends and relatives as their primary purpose, underscoring the importance of VFR (Visiting Friends and Relatives) as a trip motivator for domestic travel.

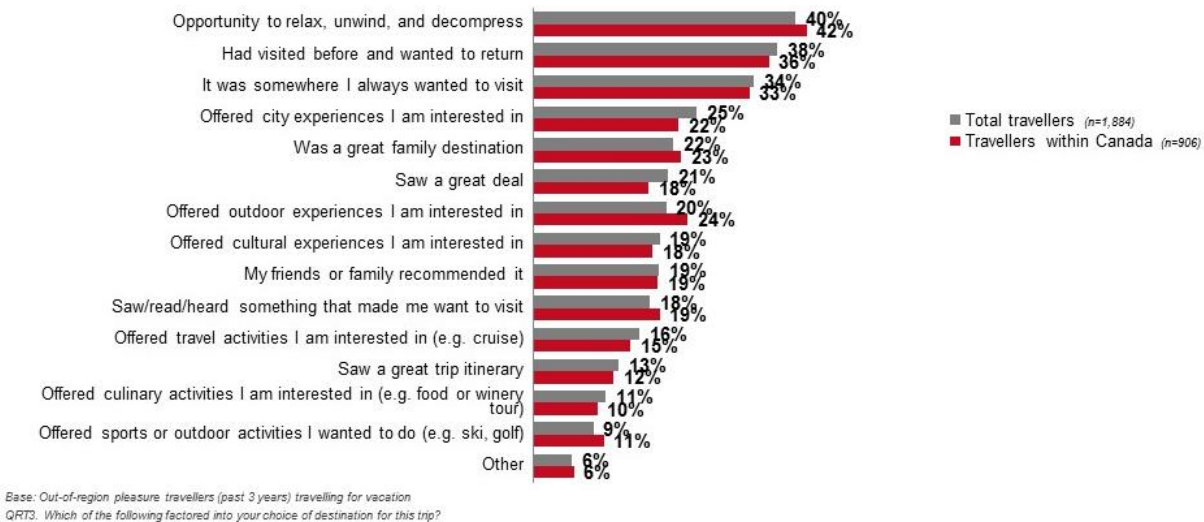
### Motivators

Those travelling for holiday purposes were asked about factors which influenced their choice of destination.

An opportunity to relax, unwind, and decompress was the primary reason for choosing the destination, among travellers generally and even more importantly for travellers within Canada. Slightly less important to Canadian travellers was that they had visited before

and wanted to return, or it was a destination they had always wanted to visit. Opportunities to enjoy city experiences, as well as a destination that was good for the family round out the top five motivators. While motivations for travelling within Canada were generally similar to overall holiday motivators, the opportunity to relax, unwind, and decompress, as well as outdoor experiences were stronger motivators for Canadian holidays than for holidays overall.

Figure 7.1: Factors Influencing Destination Selection



## Travel Party

Regardless of destination, Canadian travellers were most likely to be accompanied by their spouse (61%). Eighteen percent of Canadian travel parties contained children under the age of 18 (most common among travellers aged 35-54), which suggests the family market is small. Younger travellers aged 18-34 were the most likely group to have travelled with their parents, both to destinations generally and within Canada.

## Booking

Canadian travellers are most likely to book flights directly with the airline (25%). Twenty-three percent book flights through an online travel agency. Predictably, within Canada, many domestic travellers did not need to book flights (40% versus 33% of other travel). Older travellers aged 55+ are significantly more likely than other age groups to book with a travel agent.

Accommodation booking habits are similar to booking flights, with one-fifth (20%) of travellers not requiring accommodation. For those who did, 32% booked directly with the provider, followed by an online travel agency (28%). Also, older travellers aged 55+ were more likely to book directly with the provider, while younger travellers aged 18-34 were more likely to book through an accommodation sharing services website such as Airbnb.

## Type of Accommodation

Regardless of destination, Canadian travellers show a preference for mid-priced hotels (46%) followed by luxury hotels (19%), and budget hotels (18%). A similar pattern is true among domestic travellers (48% opted for a mid-price hotel, 20% a budget hotel and 17% for a luxury property). Owing to the prevalence of VFR travel, it is not surprising that 12% of travellers overall and 13% domestically stayed with friends and family.

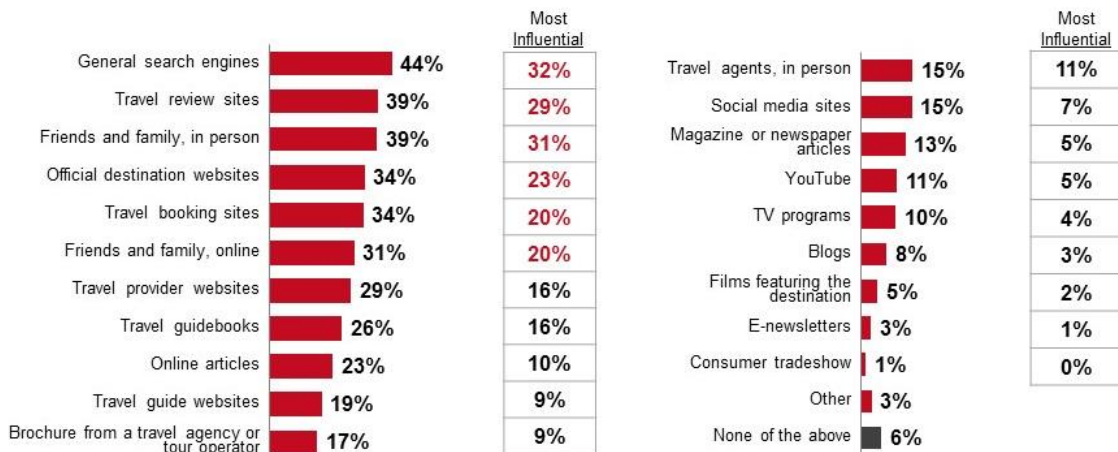
## 8. Marketing Tactics

### Sources Used to Look for Information

Canadian travellers rely on a variety of different sources when researching possible vacation destinations. General search engines (44%), travel review sites (39%), and information from friends and family in person (39%) are all top sources. Canadian travellers are also likely to use official destination websites (34%), travel booking sites (34%), and to gather information from friends and family online (31%).

General search engines, travel review sites, and asking friends and family in person were deemed the most influential information sources by Canadian travellers. Recommendations from friends and family, in person and online, are deemed more influential by younger travellers aged 18-34. Older travellers aged 55+ are more likely to view official destination websites, guidebooks, and provider websites as influential. Ensuring these sources have content which meets the needs of older travellers is important.

Figure 8.1: General Source of Destination Information / Most Influential Source



Base: Out-of-region pleasure travellers (past 3 years or next year) (n=4,005)  
 QMT1. When you research possible vacation destinations for your next trip, what sources do you use to look for information?  
 Base: Out-of-region pleasure travellers (past 3 years or next year) who mentioned an information source (n=3,759)  
 QMT2. Please select the 3 most influential information sources.

## Resources, Devices Used to Plan Recent Trip

As noted above, Canadian travellers rely heavily on online devices to plan vacations, with laptops and desktops being most prevalent. Despite the prevalence of mobile phones, they are used less commonly for travel planning (used by 29% for travellers in Canada, but are more popular among younger travellers aged 18-34 at 44%). Ensuring online travel sources are optimized for mobile is important.

Friends and family were cited as a resource for planning a domestic trip among 40% of travellers, which is likely tied to the prevalence of VFR travel. Guidebooks/magazines (14%) are less popular for planning but still ahead of travel agent consultation (9%).

Figure 8.2: Resources and Devices Used to Plan Trip

