

2020 Global Tourism Watch Highlights Report

Saskatchewan/Manitoba
November 2020

Publishing date: October 2021

La Reata Ranch
Saskatchewan

CANADA 
FOR
GLOWING
HEARTS

Canada

 **DESTINATION
CANADA**

Study Overview:

As a result of the COVID-19 pandemic in 2020 and the renewed focus on domestic travel, the Canada study was conducted among the general population (excluding residents of the Northern Territories). A total of 9,059 Canadians participated.



GTW Provincial Sample Distribution:

British Columbia Residents:	1,500
Alberta Residents:	1,500
Saskatchewan Residents:	500
Manitoba Residents:	500
Ontario Residents:	2,101
Quebec Residents:	1,507
New Brunswick Residents:	400
Nova Scotia Residents:	400
Prince Edward Island Residents:	250
Newfoundland & Labrador Residents:	401

At the provincial level, respondents are split into two groups based on their travel behaviour:

Domestic Out-of-Province Travellers: Canadian residents aged 18 years and older, who have taken a pleasure trip in Canada beyond their own province where they had stayed at least 2 nights with a minimum of 1 night in paid accommodation in the past 3 years, or plan to take such a trip in the next year. These respondents evaluated destinations outside of their province.

In-Province: Canadian residents aged 18 years and older, who evaluated destinations within their province of residence.

Context:

It is important to consider the results based in light of the COVID-19 situation at the time of data collection. In November 2020, no vaccine was approved for use and Canada was at the start of its 2nd wave of COVID-19. Many provinces tightened restrictions in November in an effort to contain the pandemic. Non-essential travel within Canada and beyond the country was discouraged. The Canada/US border had been closed since March 2020.

For additional context around the current COVID-19 situation in Canada, please refer to Destination Canada's [COVID-19 Research page](#), which includes information on resident sentiment, travel related measures, impact and recovery, and forecasting.



Timing of Fieldwork: Nov 2020

This report contains a summary of key metrics about residents of Saskatchewan/Manitoba.

Results are presented for three main groups:

- Total residents: Results among the total sample of Saskatchewan/Manitoba residents (n=1,000)
- Out-of-province: Results among out-of-province travellers in Saskatchewan/Manitoba who evaluated destinations outside of their province (n=500)
- In-province: Results among residents of Saskatchewan/Manitoba who evaluated destinations within their province (n=500)

Charts are colour coded to show the results among each group:

Legend:

Total Residents

Out-of-Province Travellers

Residents evaluating in-province destinations

KEY HIGHLIGHTS

Key Highlights – Saskatchewan/Manitoba Market

Insight	Implication
<p>There is pent up demand for travel, but Saskatchewan/Manitoba residents also have concerns, primarily related to health and safety in a potential destination.</p> <p>Residents of Saskatchewan/Manitoba are among the least likely of all Canadian residents to report that they feel safe travelling now.</p>	<p><i>Illustrating that health and safety measures are in place and a destination is safe to visit are key messages that need to be communicated to encourage Saskatchewan/Manitoba residents to travel within their province and to other Canadian provinces and territories in 2021.</i></p> <p><i>It may be challenging to convince Saskatchewan/Manitoba residents to travel in 2021.</i></p>
<p>There is a small group of Saskatchewan/Manitoba residents who feel safe travelling now. This group is more likely to have travelled since the start of the pandemic and are more likely to be comfortable flying domestically. The biggest barrier to travel within Canada for those who feel safe travelling is cost.</p>	<p><i>Travel deals and illustrating the value a vacation within their province or to other Canadian provinces and territories may motivate this group to travel more in 2021.</i></p>
<p>Leisure trips and visiting family and friends will drive Saskatchewan/Manitoba residents' travel in 2021. Residents of these provinces are more likely than the Canadian average to travel out-of-province to visit family and friends.</p> <p>When travelling out-of-province, Saskatchewan/Manitoba residents are generally following a Canada-wide trend of staying closer to home but may be willing to travel a little further than other Canadian residents: Alberta and British Columbia stand out as the top provinces under consideration.</p>	<p><i>There is a good opportunity to reach potential travellers in Saskatchewan/Manitoba by encouraging travel to visit family and friends in other Canadian provinces and territories, in addition to marketing leisure trip itineraries.</i></p> <p><i>Alberta and British Columbia have the most to gain from the Saskatchewan/Manitoba market.</i></p>
<p>There are mixed opinions on city travel. For out-of-province travel, there is considerable interest in visiting major cities (e.g. Calgary and Vancouver) but also more nature-oriented destinations such as Banff/Lake Louise. For travel within Saskatchewan/Manitoba, there is some appetite for city travel and also for trips to more rural destinations.</p>	<p><i>There is an opportunity for both cities and smaller destinations to attract visitors from Saskatchewan/Manitoba, while more rural areas, including provincial and national parks, may find a greater opportunity with the resident market.</i></p>
<p>Trips to familiar destinations with limited interactions are favoured. Saskatchewan/ Manitoba residents are most interested in taking trips where activities and social interactions are limited. They are also more open to re-visiting familiar destinations than travelling to new destinations.</p>	<p><i>There is a greater opportunity to resonate with potential Saskatchewan/Manitoba travellers by highlighting uncrowded yet familiar destinations.</i></p>
<p>Residents of Saskatchewan/Manitoba are very outdoors focused, with COVID-19 likely enhancing the popularity of outdoor activities such as hiking/walking in nature, natural attractions, and nature parks.</p>	<p><i>Communicating the availability of popular outdoor activities in uncrowded settings, whether in-province or in other provinces or territories, will capture the attention of potential travellers in Saskatchewan/Manitoba.</i></p>
<p>Younger Saskatchewan/Manitoba residents (under 35 years) are eager to resume travelling. They are less concerned about health and safety and have the strongest intent to travel both within their province and to other parts of Canada. This audience is also the most open to visiting larger Canadian cities.</p>	<p><i>Younger Saskatchewan/Manitoba residents (under 35 years) represent the best immediate opportunity for operators in Saskatchewan/Manitoba as well as those in other provinces and territories.</i></p>
<p>Older Saskatchewan/Manitoba residents (55+ years) are more hesitant to travel in the near future. Much of their hesitancy is related to health and safety concerns.</p>	<p><i>Clearly illustrating in communications that health and safety measures are being followed and that a destination is safe is particularly important for attracting older Saskatchewan/Manitoba residents (55+ years).</i></p>

DOMESTIC TRAVEL INTENT AND CONSIDERATION

Key Insights:

- As seen with residents across Canada, the COVID-19 pandemic has severely impacted Saskatchewan/Manitoba residents' plans to travel in 2021.
- Relative to the Canadian average, residents are more likely to spend more time at home relative to 2019. The outlook for in-province and out-of-province domestic travel is in line with the Canadian average.
- Saskatchewan/Manitoba residents are willing to travel a little further from home for out-of-province travel than other Canadian residents. **Alberta and British Columbia are the provinces that stand to benefit the most from the Saskatchewan/Manitoba outbound market.**

Vacation Outlook – Next Year vs. Past Year (% spending more time minus % spending less time)

Staying at home	+43
Travelling within your province	-9
Travelling outside of your province, but within Canada	-38
Travelling outside of Canada	-69



Total Residents (n=1000)

Likelihood of Travelling within Canada – Next Year

Out-of-Province Travel

Immediate Potential
(Any trip length within Canada
outside of own province)



Out-of-Province Travellers (n=500)

Market Size Potential
(Out-of-Province Travellers
considering visiting each region)

British Columbia	667,000
Alberta	667,000
Saskatchewan (among Manitoba residents)	131,000
Manitoba (among Saskatchewan residents)	105,500
Ontario	371,000
Quebec	88,000
Atlantic	461,000
North	108,000



In-Province Travel

Immediate Potential
(Any trip length within province)



Residents evaluating in-province destinations (n=500)

DOMESTIC TRAVEL INTENT AND CONSIDERATION (CONT.)

Key Insights:

- Alberta and BC are the provinces most likely to be under consideration for a visit in the next year, and all of the top-five destinations under consideration are in those two provinces. **Alberta and BC stands to benefit the most from the Saskatchewan/Manitoba outbound market.**
- Destinations popular for in-province travel include a mix of cities and national/provincial parks. **This suggests there is an opportunity for both cities and more rural destinations to capitalize on the in-province market.**

Destinations Seriously Considering – Next Year

Out-of-Province Travel – Top 3 Provinces

52%	51%	28%
Alberta	British Columbia	Ontario

Top 5 Destinations

34%	33%	33%	26%	24%
Calgary	Vancouver	Banff & Lake Louise	Edmonton	Victoria

Out-of-Province Travellers (n=500)

In-Province Travel – Top 3 Destinations

Saskatchewan	Manitoba
Moose Jaw 32%	Riding Mountain National Park 40%
Saskatoon 28%	Whiteshell Provincial Park 38%
Cypress Hills 26%	Brandon 22%

Residents evaluating in-province destinations (n=250/n=250)

Most Appealing Destinations / Destination Knowledge

Out-of-Province Travel – Top 3 Appealing Provinces

	British Columbia	Alberta	Ontario
Most Appealing	34%	32%	12%
Knowledge (excellent/very good)	44%	42%	36%

Top 3 Appealing Destinations

	Vancouver	Banff & Lake Louise	Calgary
Most Appealing	12%	11%	9%
Knowledge (excellent/very good)	41%	42%	45%

Out-of-Province Travellers planning to travel within Canada in next year (n=401/n=391)

In-Province Travel – Top 2 Appealing Destinations

	Most Appealing	Knowledge (excellent/very good)
Whiteshell Provincial Park (MB)	31%	34%
Riding Mountain National Park (MB)	30%	30%
Moose Jaw (SK)	21%	37%
Cypress Hills (SK)	21%	19%



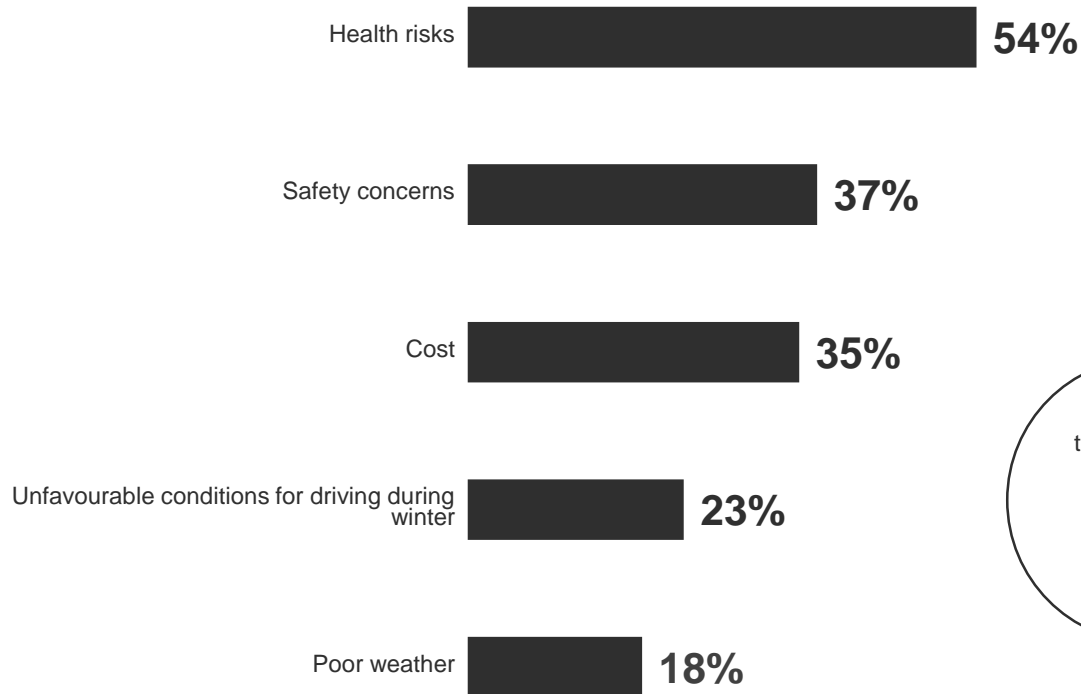
Residents evaluating in-province destinations planning to travel within Canada in next year (n=165/n=166)

BARRIERS TO TRAVEL WITHIN CANADA

Key Insights:

- Health risks are the top barrier to travel within Canada, with Saskatchewan/Manitoba residents expressing greater concern than the national average. Concerns about health risks increase with age and may be linked to the availability of a vaccine for COVID-19 (as this study was fielded in November). As more Saskatchewan/Manitoba residents are vaccinated, health risks may decline as a barrier to travel. ***Demonstrating that health and safety measures are in place and a destination is safe to visit are key messages that need to be communicated to encourage Saskatchewan/Manitoba residents to travel within their province and to other Canadian provinces and territories.***
- Just 14% of Saskatchewan/Manitoba residents feel safe travelling now, which is below the national average. This small group is more likely to have travelled during the pandemic and more likely to say they are comfortable flying domestically. The top barrier for this group is cost, so ***travel deals could motivate those already comfortable travelling to take more trips.***

Top 5 Barriers to Travel



Feel safe travelling now

14%



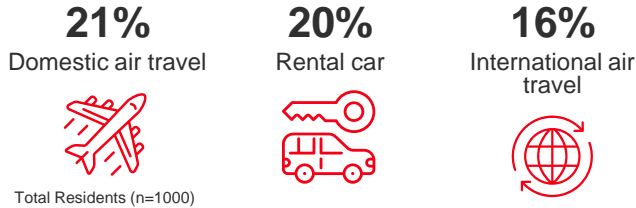
Total Residents (n=1000)

COVID-19 CONSIDERATIONS

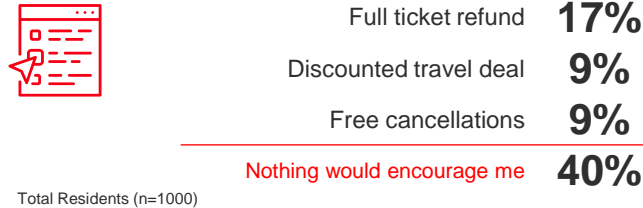
Key Insights:

- There is pent up demand for travel, with nearly two-thirds of Saskatchewan/Manitoba residents indicating they are eager to travel again.
- Saskatchewan/Manitoba residents are most interested in taking trips where activities and social interactions are limited, and with more outdoor-based activities and attractions. They are more open to re-visiting familiar destinations than travelling to new destinations. **There is a greater opportunity to resonate with potential travellers by highlighting outdoor activities at uncrowded and familiar destinations.**
- While 40% of Saskatchewan/Manitoba residents say nothing could encourage them to book a trip in the near future, the other 60% are open to a variety of booking incentives. **Flexible options and travel deals may encourage some to book sooner.**
- When choosing a destination, health and safety measures and COVID-19 case counts are the most important considerations for potential travellers. **To reassure potential visitors, it is important to communicate that health and safety protocols are in place.**

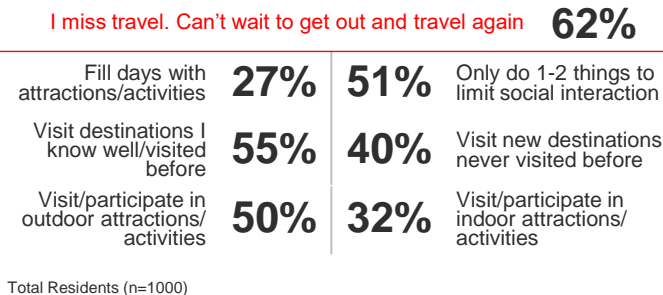
Transportation Mode Likely to Use – Top 3



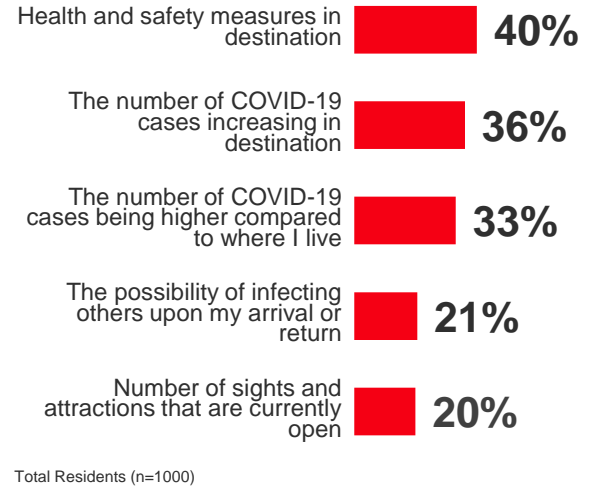
Incentives to Book in the Near Future – Top 3



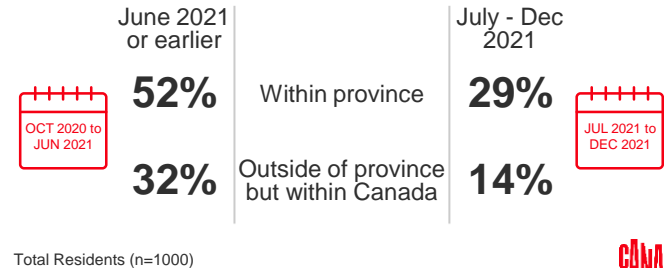
Attitudes Towards Travel – Top2Box



COVID Specific Factors to Consider when Selecting Destination – Top 5



First Time Comfortable Travelling



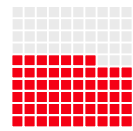
KEY CHARACTERISTICS OF NEXT CANADA TRIP

Key Insights:

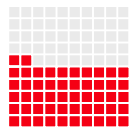
- Travelling for vacation purposes and visiting family and friends will drive travel in 2021. Relative to the Canadian average, in Saskatchewan/Manitoba out-of-province travel is more likely to be motivated by VFR. **There is a good opportunity to reach potential travellers in Saskatchewan/Manitoba by encouraging travel to visit family and friends in other Canadian provinces and territories, in addition to marketing leisure trip itineraries.**
- In the next year, domestic travel parties will largely be made up of immediate family. **Couples and families represent the greatest potential markets for in-province and out-of-province travel.**
- Relative to the Canadian average, Saskatchewan/Manitoba residents are more likely to stay with friends and family when travelling, **which could indicate a greater challenge to encourage stays in paid accommodations.**

Trip Purpose

Out-of-Province Travel



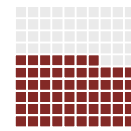
Vacation
57%



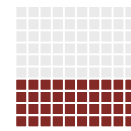
Visit family and friends
52%

Out-of-Province Travellers answering (n=414)

In-Province Travel



Vacation
57%



Visit family and friends
40%

Residents evaluating in-province destinations answering (n=341)

Trip Length – Top 3 / Travel Party – Top 3 / Accommodation – Top 3

Out-of-Province Travel

42%

4-6 nights



Spouse or partner
65%

Child (under 18 years old)
19%

Alone/sole
15%



Would travel with spouse/partner only

39%



44%

Home of friends or relatives

42%

Mid-priced hotel/motel

26%

Budget hotel/motel

Out-of-Province Travellers answering (n=414)

In-Province Travel

55%

2-3 nights



Spouse or partner
60%

Child (under 18 years old)
20%

Other family members
17%



Would travel with spouse/partner only

39%



42%

Mid-priced hotel/motel

32%

Home of friends or relatives

25%

Bed & Breakfast (B&B)

Residents evaluating in-province destinations answering (n=341)

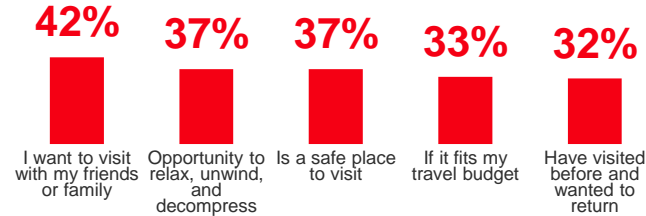
KEY CHARACTERISTICS OF NEXT CANADA TRIP (CONT.)

Key Insights:

- Visiting friends and family, relaxation and destination safety are the top factors Saskatchewan/Manitoba residents consider when choosing a destination. **Communicating that travellers can safely relax and reconnect with family and friends with health and safety measures in place will help to reassure potential visitors.**
- Saskatchewan/Manitoba residents are drawn to outdoor activities and natural attractions, both as a vacation activity and to anchor a trip around. **Saskatchewan/Manitoba represents a good potential market for operators offering outdoor-based itineraries.**

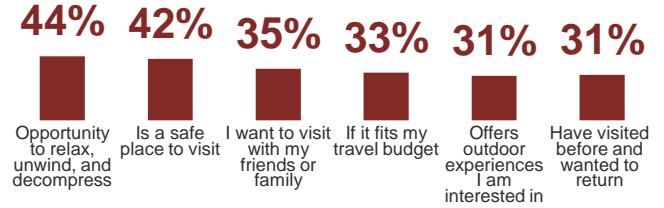
Destination Selection Factors – Top 5

Out-of-Province Travel



Out-of-Province Travellers answering (n=414)

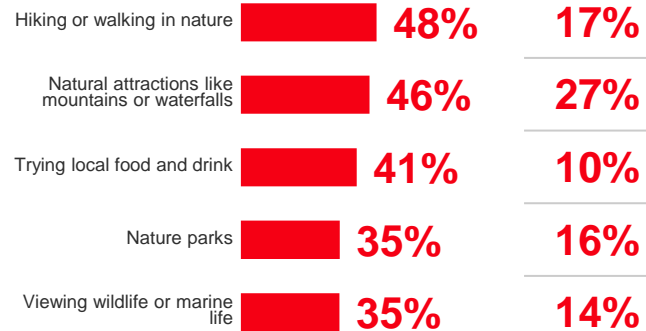
In-Province Travel



Residents evaluating in-province destinations answering (n=341)

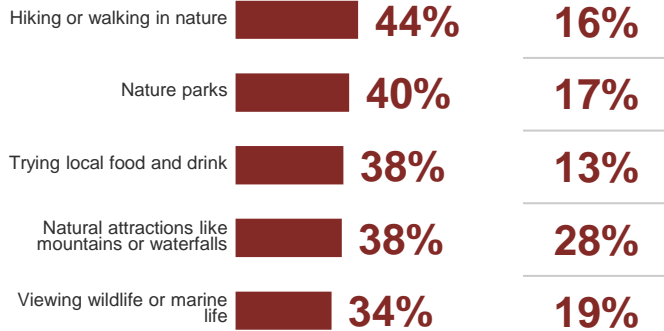
Vacation Activities – Top 5

Out-of-Province Travel



Out-of-Province Travellers answering (n=414/n=481)

In-Province Travel



Residents evaluating in-province destinations answering (n=341/n=455)

Key Insights:

- Compared to other Canadian residents, Saskatchewan/Manitoba residents are less likely to work with a travel agent for booking accommodation on domestic trips, preferring to book through an online booking engine or directly with an establishment. Still, roughly one-third say they would book through a travel agent.
- When deciding to work with a travel agent for any part of the trip planning process, Saskatchewan/Manitoba residents are typically looking for expert destination knowledge, a good deal, or to reduce the hassle of booking of potential trip interruptions. **The greatest opportunity for travel agents to engage with potential travellers in Saskatchewan/Manitoba is by highlighting those offerings at the booking stage.**

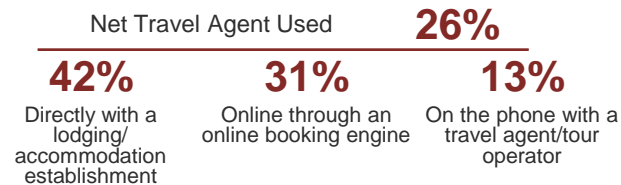
Accommodation Booking – Top 3

Out-of-Province Travel



Out-of-Province Travellers answering (n=414)

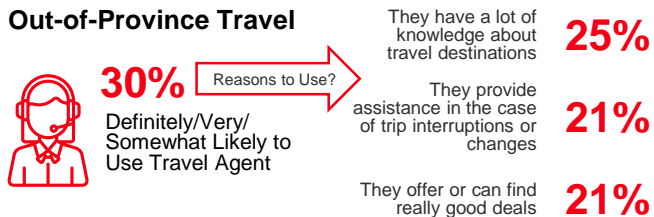
In-Province Travel



Residents evaluating in-province destinations answering (n=341)

Likelihood to Use Travel Agents/Reasons to Use Agent – Top 3

Out-of-Province Travel



Out-of-Province Travellers answering (n=414)
Out-of-Province Travellers likely to use agent (n=193)

In-Province Travel



Residents evaluating in-province destinations answering (n=341)
Residents evaluating in-province destinations likely to use agent (n=118)

Travel Agent Tasks – Top 3

Out-of-Province Travel



Out-of-Province Travellers likely to use agent (n=128)

In-Province Travel

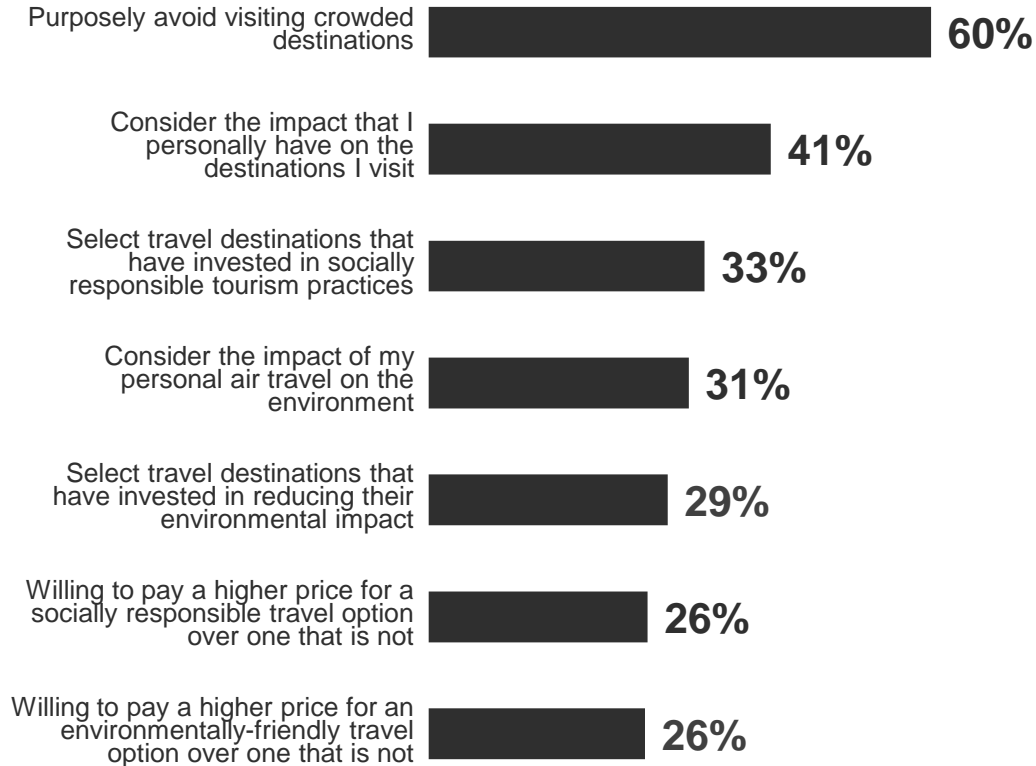


Residents evaluating in-province destinations likely to use agent (n=86)

Key Insights:

- Saskatchewan/Manitoba residents are intentionally seeking out less crowded destinations, which may be related to concerns about COVID-19.
- At least a quarter of Saskatchewan/Manitoba residents say they consider various aspects of sustainability when selecting travel destinations, and they may be willing to pay for more responsible options. However, only a handful mention the availability of eco-friendly travel activities as a top factor influencing their destination choice, whether for out-of-province (5%) or in-province (6%) trips. ***This suggests that while sustainability is a consideration for potential Saskatchewan/Manitoba travellers, there are other factors that play a greater deciding role in destination selection.***

Attitudes About Sustainable Travel



Total Residents (n=1000)

DOMESTIC TRAVEL INTENT AND CONSIDERATION

Vacation Outlook – Next Year vs. Past Year

S2. How do you plan to spend your vacation time in the next 12 months compared to the last 12 months? Will you spend your vacation time ...

Likelihood of Traveling Within Canada – Next Year

MP6. Realistically, how likely are you to take a vacation trip outside of your own province, but within Canada in the next year?

Market Potential – Calculated value: Total out of province travellers (S3, S5) seriously considering visiting a province (BVC1a)

Destinations Seriously Considering – Next Year

BVC1a. You may have already mentioned this before, but which destinations would you seriously consider visiting in the next year? (Select all that apply)

BVC1b. You may have already mentioned this before, but which destinations would you seriously consider visiting in the next year? (Select all that apply)

Most Appealing Destinations – Top 3 / Destination Knowledge

MP8a. Earlier, you mentioned you would seriously consider visiting the following provinces in the next year. Which place most appeals to you? (Select one)

MP8b. Earlier, you mentioned you would seriously consider visiting the following destinations in the next year. Which place most appeals to you? (Select one)

MP3. How would you rate your level of knowledge of vacation opportunities in each of the following destinations? (Select one for each)

BARRIERS TO TRAVEL WITHIN CANADA

Top 5 Barriers to Travel

MP9. Which of the following reasons might prevent you from travelling within Canada? (Select all that apply)

COVID-19 CONSIDERATIONS

Transportation Mode Likely to Use – Top 3

COV16. As government restrictions related to COVID-19 are relaxed, how likely are you to use the following modes of transportation?

Incentives to Book in the Near Future – Top 3

COV17. Which one of the following offerings would most encourage you to make a travel booking in the near future? (Select one)

Attitudes Toward Travel – Top2Box

COV13. Thinking of your next vacation, as government restrictions related to COVID-19 are relaxed, how much do you agree or disagree with the following statements?

Factors to Consider when Selecting Destination (COVID Specific) – Top 5

NEWQ4. When thinking about taking a vacation trip to [within province / outside your own province, but within Canada], which of the following are the most important considerations in selecting your travel destination? (Select up to 3 options)

First Time Comfortable Travelling

COV5. Given the current situation with COVID-19, when is the first month that you would feel comfortable travelling to the following destinations?

KEY CHARACTERISTICS OF NEXT CANADA TRIP

Trip Purpose

FT2. Thinking of your next trip to [within province / outside your own province, but within Canada], what would be the main purpose of this trip?

Trip Length – Top 1 / Travel Party – Top 3 / Accommodation – Top 3

FT4. Thinking of your next trip to [within province / outside your own province, but within Canada], how many nights do you think you would spend?

FT5. Thinking of your next trip to [within province / outside your own province, but within Canada], who would you travel with? (Select all that apply)

FT10. Thinking of your next trip to [within province / outside your own province, but within Canada], which types of accommodation would you consider staying at?

Destination Selection Factors – Top 5

FT3. Thinking of your next trip to [within province / outside your own province, but within Canada], which of the following would factor into your choice to travel to that destination? (Select all that apply)

Vacation Activities – Top 5

FT11. Thinking of your next trip to [within province / outside your own province, but within Canada], what activities would you be interested in participating in? (Select all that apply)

MP12. Among these activities are there any that are important enough that you would base an entire trip around that activity? (Select all that apply)

BOOKING

Accommodation Booking – Top 3

FT8. Thinking of your next trip to [within province / outside your own province, but within Canada], which methods would you be likely to use to book your accommodation? (Select all that apply)

Likelihood to Use Travel Agents / Travel Agent Tasks – Top 3

FT6. Travel agents offer personalized service to help individuals, groups, and business travellers plan and organize their travel schedules, from purchasing tour packages to booking flights and hotels. Examples of travel agents include Flight Centre or Transat Travel, they do not include online booking engines like Expedia or Travelocity. Thinking of your next trip to [within province / outside your own province, but within Canada], how likely are you to use a travel agent or tour operator to help you research or book your trip?

NEWQ2. Which of the following reasons is the most important consideration for using a travel agent to book your next vacation trip?

Travel Agent Tasks – Top 3

FT7. Which of the following would you have a travel agent or tour operator help you with? (Select all that apply)

SUSTAINABLE TRAVEL

Agreement with Statements – Top2Box (Strongly/Somewhat Agree)

PC31. 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”. Please indicate your level of agreement with each of the following statements ...