SKIFT US PERCEPTION AND BEHAVIOUR RESEARCH PROGRAM

Identifying tourism perceptions of Canada among US travellers

Wave 1 Results

July 2025

Skift ADVISORY

CONFIDENTIALITY STATEMENT

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July 2025

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INTRODUCTION AND METHODOLOGY

Introduction and Methodology

INTRODUCTION

In the context of heightened political and social tensions between the United States and Canada in 2025, understanding American tourists' perceptions and intentions toward traveling to Canada is critical for Canadian tourism stakeholders. Recent U.S. policies, including proposed tariffs and trade policies, alongside Canada's federal election outcomes, have raised concerns about their impact on cross-border tourism.

This report presents findings from a mixed-method study combining social listening and a quantitative survey to capture U.S. travellers' sentiments, preferences, and barriers, looking at both national and regional dynamics.

The social listening component monitored online conversations across digital platforms to gauge sentiment trends. Complementing this, a comprehensive survey of potential U.S. travellers assessed travel intentions, safety concerns, border issues, and destination preferences, incorporating specific regional requirements from Canadian tourism organizations.

By integrating insights across multiple sources, this study provides a nuanced understanding of how political and social dynamics influence American travel decisions to Canada.

This report aims to inform Canadian tourism boards, particularly in key provinces and regions, about strategies to maintain Canada's appeal as a safe, welcoming, and cost-effective destination. The findings highlight motivators (e.g., events, exchange rates), barriers (e.g., border concerns, political climate), and media influences shaping U.S. travellers' perceptions. Through actionable recommendations, the report seeks to support targeted marketing and policy adjustments to sustain and grow U.S. tourism to Canada in 2025 and beyond.

OBJECTIVES

The following objectives are addressed in this report:

- Assess Travel Intentions: Determine the likelihood of U.S. travellers planning a trip to Canada within the next 12–24 months, including trip type (leisure, business, events), duration, budget, and travel group composition.
- Evaluate Sentiment and Perceptions: Analyse U.S. travellers' sentiments toward Canada as a travel destination, focusing on perceived safety, hospitality, value for money, cultural attractions, and political stability.
- Identify Regional Preferences: Measure familiarity and interest in specific Canadian provinces (e.g., Ontario, British Columbia, Quebec) and regions to inform regional tourism strategies.
- Understand Geopolitical Impacts: Examine how recent U.S. political developments (e.g., Trump's presidency, tariffs) and Canadian events (e.g., federal election) influence travel decisions and perceptions of welcomeness.
- Assess Border and Safety Concerns: Identify concerns related to border crossing (e.g., documentation, delays) and safety perceptions, including specific worries about entering Canada or returning to the U.S.
- Explore Economic Factors: Evaluate awareness of the U.S.-Canadian exchange rate and perceptions of Canada's affordability compared to domestic or other international destinations.
- Determine Conversion Drivers: Identify key motivators for travel (e.g., major events like TIFF or FIFA 2026, deals, bucket list goals) and the influence of social proof (e.g., friends, family, social media).
- Analyze Media Influences: Understand which media channels (e.g., television, X, Instagram) shape U.S. travellers' perceptions of Canada and their travel decisions.
- Compare Domestic vs. International Travel: Assess preferences for domestic U.S. travel versus international travel to Canada in 2025–2026, identifying competitive barriers.
- Provide Actionable Insights: Deliver data-driven recommendations to Canadian tourism organizations to enhance marketing, address barriers, and promote regional destinations effectively.

METHODOLOGY

A mixed methodology was followed to arrive at key insights regarding Canadian travel intentions from US international travellers.

Overview and Timing

- Data was collected through digital listening and a quantitative survey.
- Digital Listening results span between 1 April and 30 June 2025.
- The survey was conducted between 6 and 17 June 2025.

Digital Listening

- Mentions monitored via Mentionlytics platform.
- Platforms monitored: X, Facebook, YouTube, Instagram, Others (e.g. Reddit, Bluesky).
- Keywords used: Canada / Region + (Travel, Tourism, Visit, Vacation, Holiday, Trip, Itinerary).

Quantitative Survey

- Target population: US international travellers (past or intended) aged 18+
- Data collected via online panel
- Total sample size of 2,000 respondents
- Sample proportionally representative of U.S. demographics

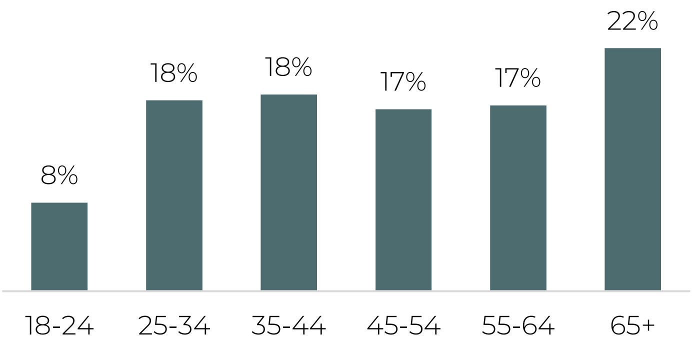
Data Analysis

- Data was analysed against stated likelihood of Canadian travel in the next 12 months
- Regression analysis employed to derive drivers of destination appeal

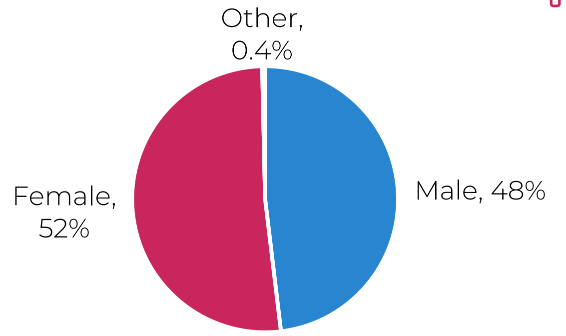
METHODOLOGY

SAMPLE DEMOGRAPHICS

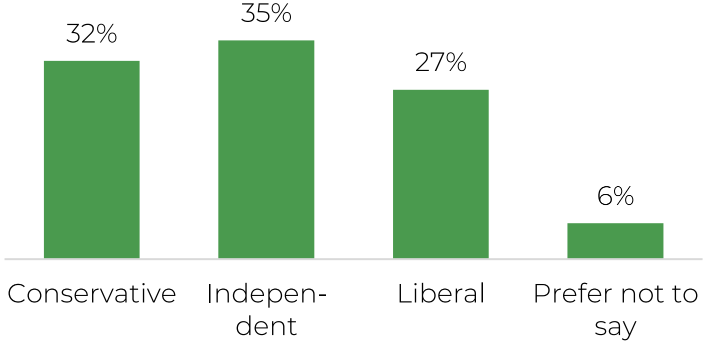
Age



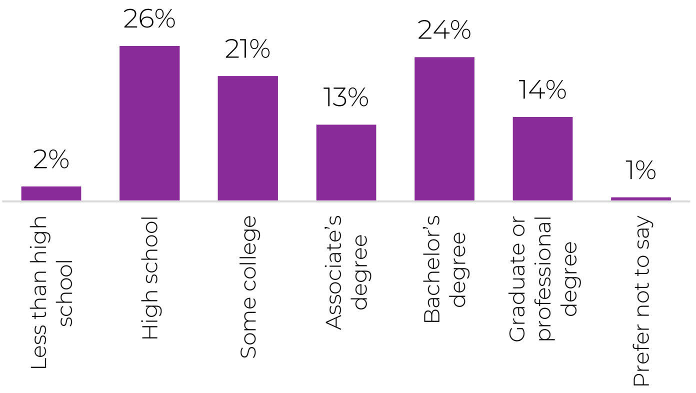
Gender



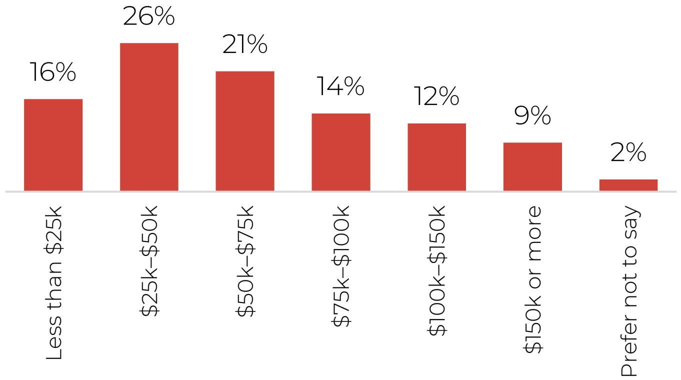
Political alignment



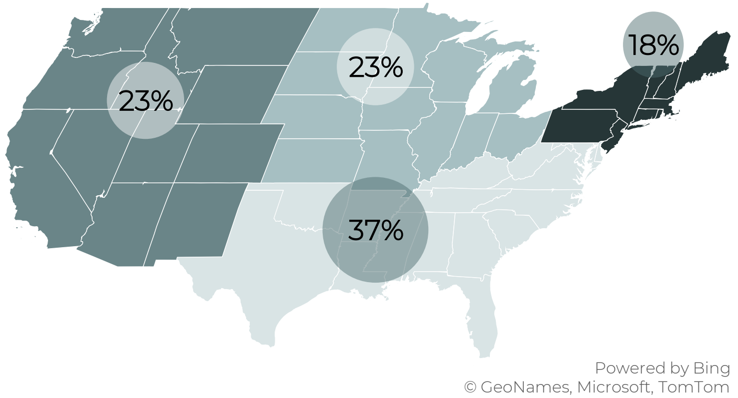
Education



Income



Geography



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EXECUTIVE SUMMARY

EXECUTIVE SUMMARY

Highlights

- Over 50% of U.S. international travellers are likely to visit Canada within the next 12 months, with vacation travel being the primary motive.
- Unlikely travellers show general travel apathy, favoring domestic trips and displaying less concern about current political or geopolitical issues.
- Tariffs, trade policies, and travel costs are top external concerns influencing travel intentions, especially among likely travellers.
- Destination familiarity strongly correlates with travel likelihood; less familiarity results in lower interest, particularly in smaller provinces and territories.
- Digital media, especially YouTube and social platforms, play a critical role in shaping perceptions and travel decisions.
- Canada's winter travel appeal remains weak among U.S. travellers, necessitating strategic efforts to boost winter tourism.
- Targeted messaging to address barriers and highlight strengths like safety, cultural attractions, and hospitality can convert unsure travellers and counter apathy.

Conclusion

U.S. travel intent to Canada is influenced by a complex interplay of traveller apathy, political and trade concerns, destination familiarity, seasonality, and cost perceptions. While a majority remain interested in visiting Canada, especially for vacation purposes, overcoming apathy and uncertainty requires sustained strategic efforts. Canada's tourism industry should focus on reinforcing strengths such as safety, cultural richness, and hospitality, while addressing barriers through targeted communication about affordability, border processes, and regional offerings. Enhancing winter tourism appeal and effectively managing digital sentiment will further support increased travel. Ultimately, converting unsure travellers and maintaining the interest of likely travellers will depend on clear, consistent messaging that highlights Canada's unique value proposition within the competitive travel landscape.

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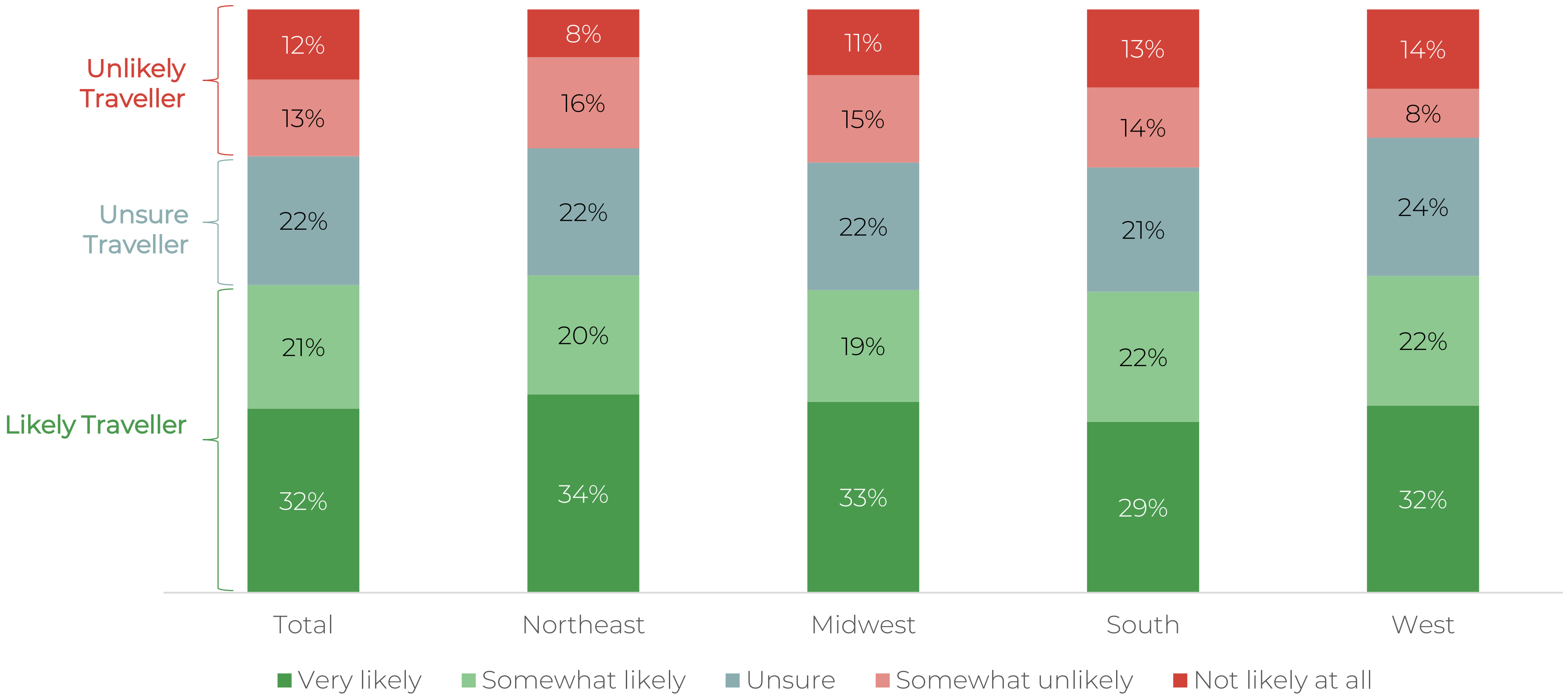
CHAPTER 1

Short-term Tactical Opportunities

GENERAL TRAVEL INTENTIONS

More than 50% of US international travellers indicate they are likely to travel to Canada in the next 12 months, with very little variation by region within the US.

Likelihood to travel to Canada in the next 12 months



Impact of political leaning on likelihood to travel (Top-2 Box Score)

Conservative	51%
Independent	51%
Liberal	▲ 62%
Prefer not to say	▼ 26%

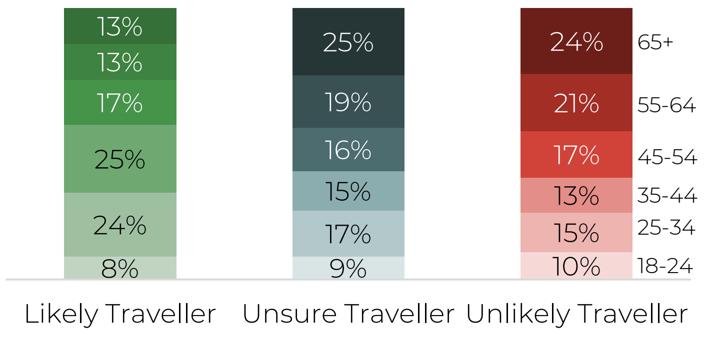
- **Conservative**: advocate for limited government, traditional values, free-market policies. Tend to vote Republican.'
- **Liberal**: support progressive change, government intervention to promote social equity, policies like healthcare reform, environmental protection, and diversity. Tend to vote Democrat.
- **Independent**: value pragmatism, may base decisions on personal or economic factors rather than party loyalty.

How likely are you to travel to Canada in the next 12 months?

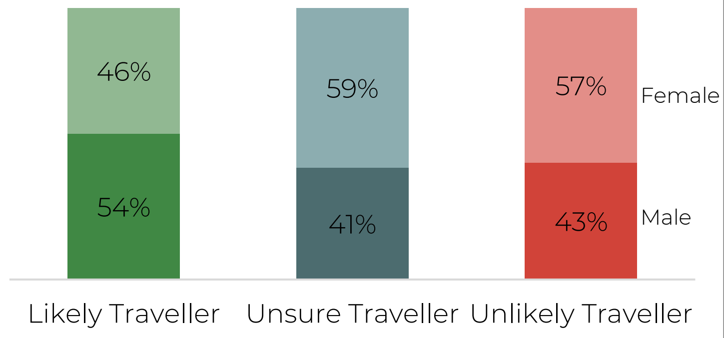
GENERAL TRAVEL INTENTIONS

Likely travellers to Canada skew slightly younger, male, educated, and higher income. These travellers are also somewhat less to be conservative politically.

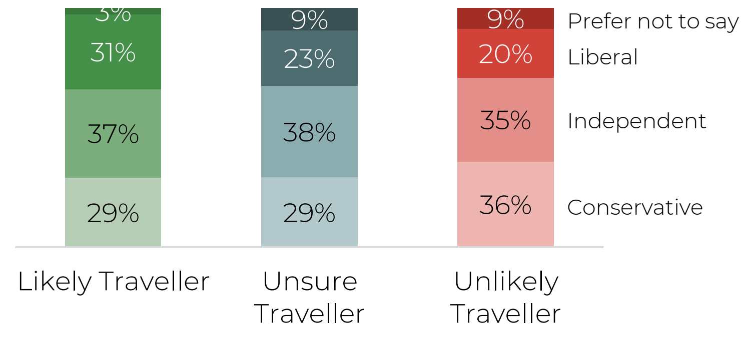
Age



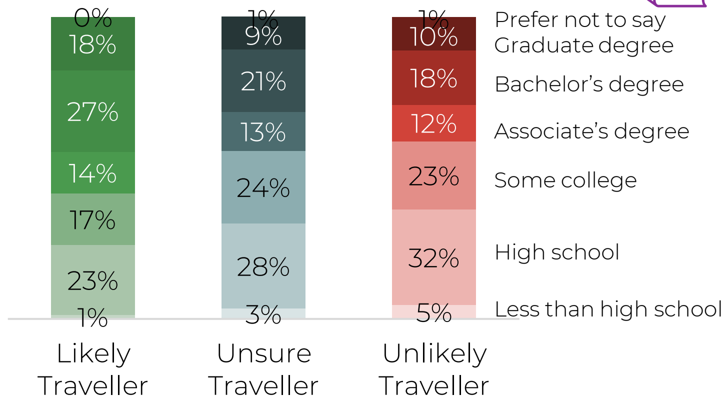
Gender



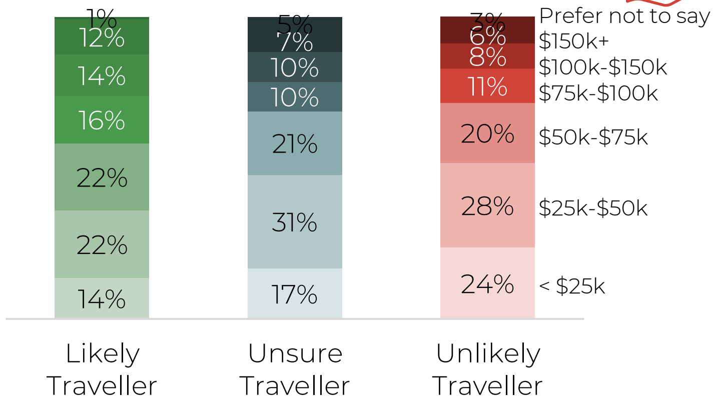
Political alignment



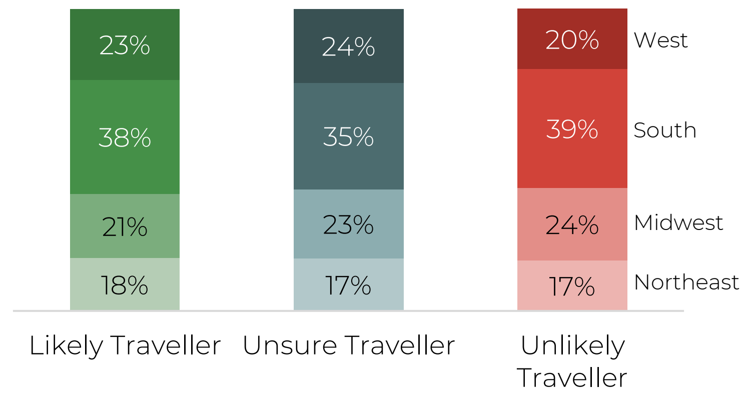
Education



Income



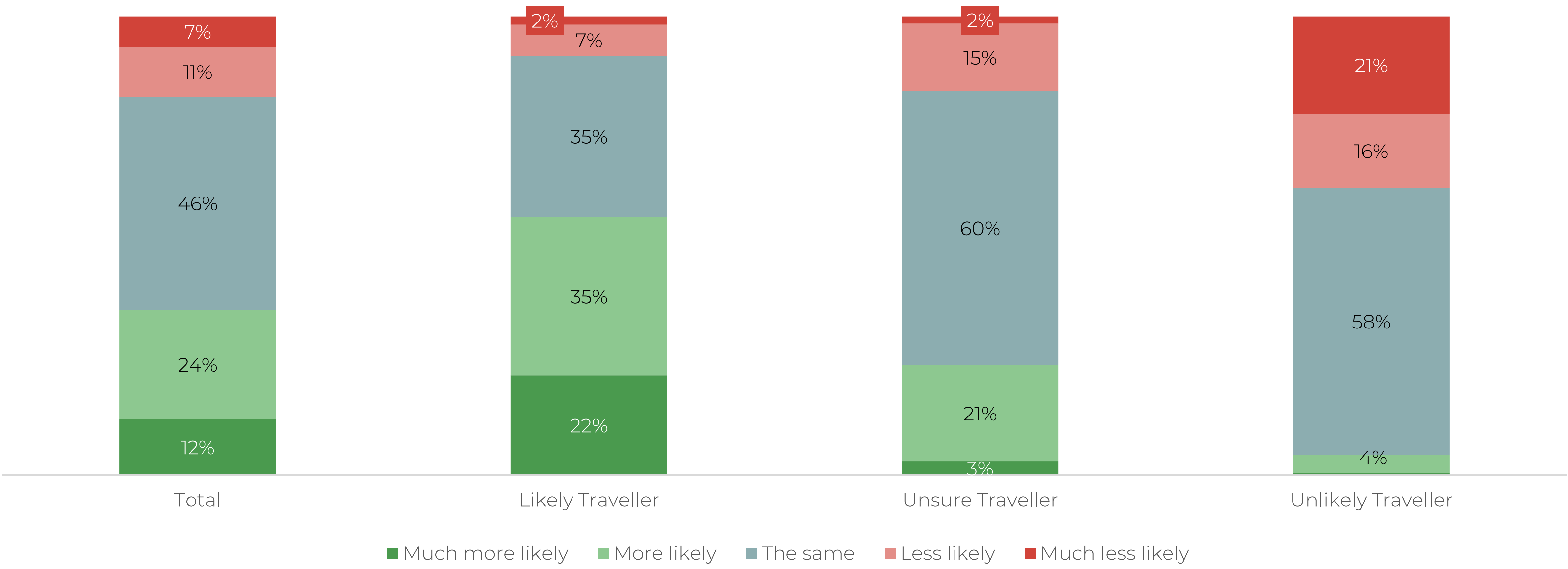
Geography



GENERAL TRAVEL INTENTIONS

Likely travellers have increased their likelihood to travel to Canada compared to 12 months ago, while unlikely travellers were unlikely to travel to Canada previously as well.

Change in Likelihood to travel to Canada in the next 12 months

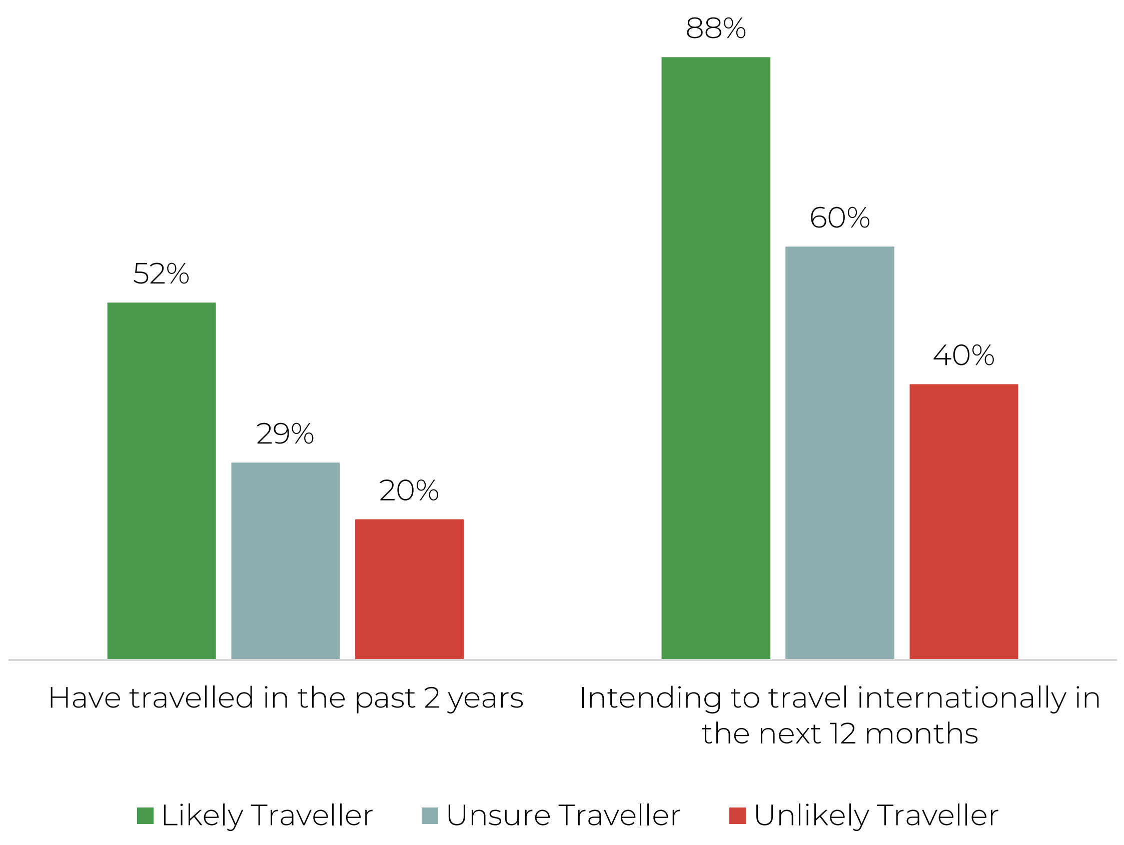


Compared to 12 months ago, how has your likelihood of planning a trip to Canada changed?

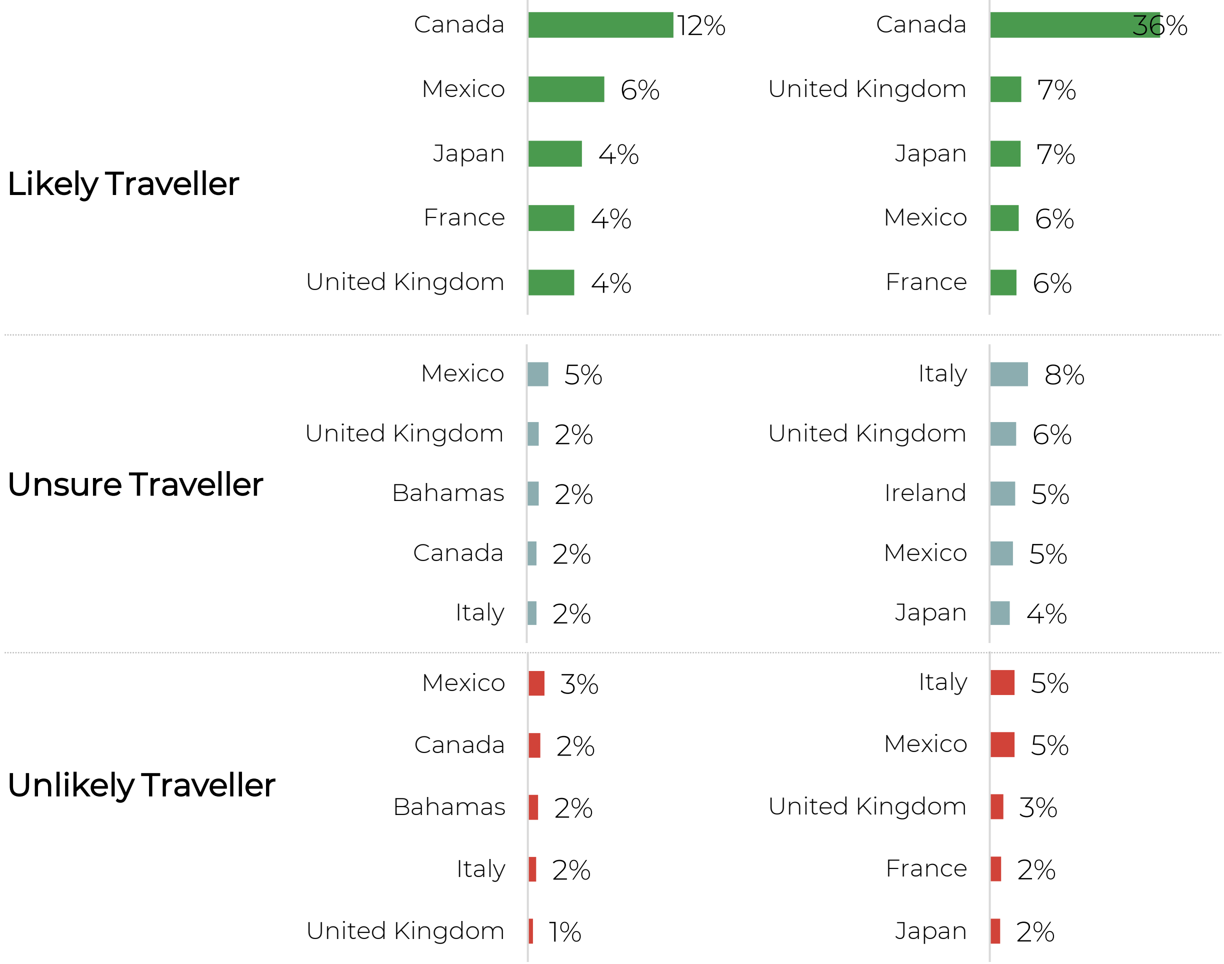
GENERAL TRAVEL INTENTIONS

Those unlikely to travel to Canada in the next 12 months are generally less likely to travel, indicating that the travel hesitance is more of a general behaviour than a rejection of Canada as a destination.

Past and Future International Travel



Top past/intended international travel destinations



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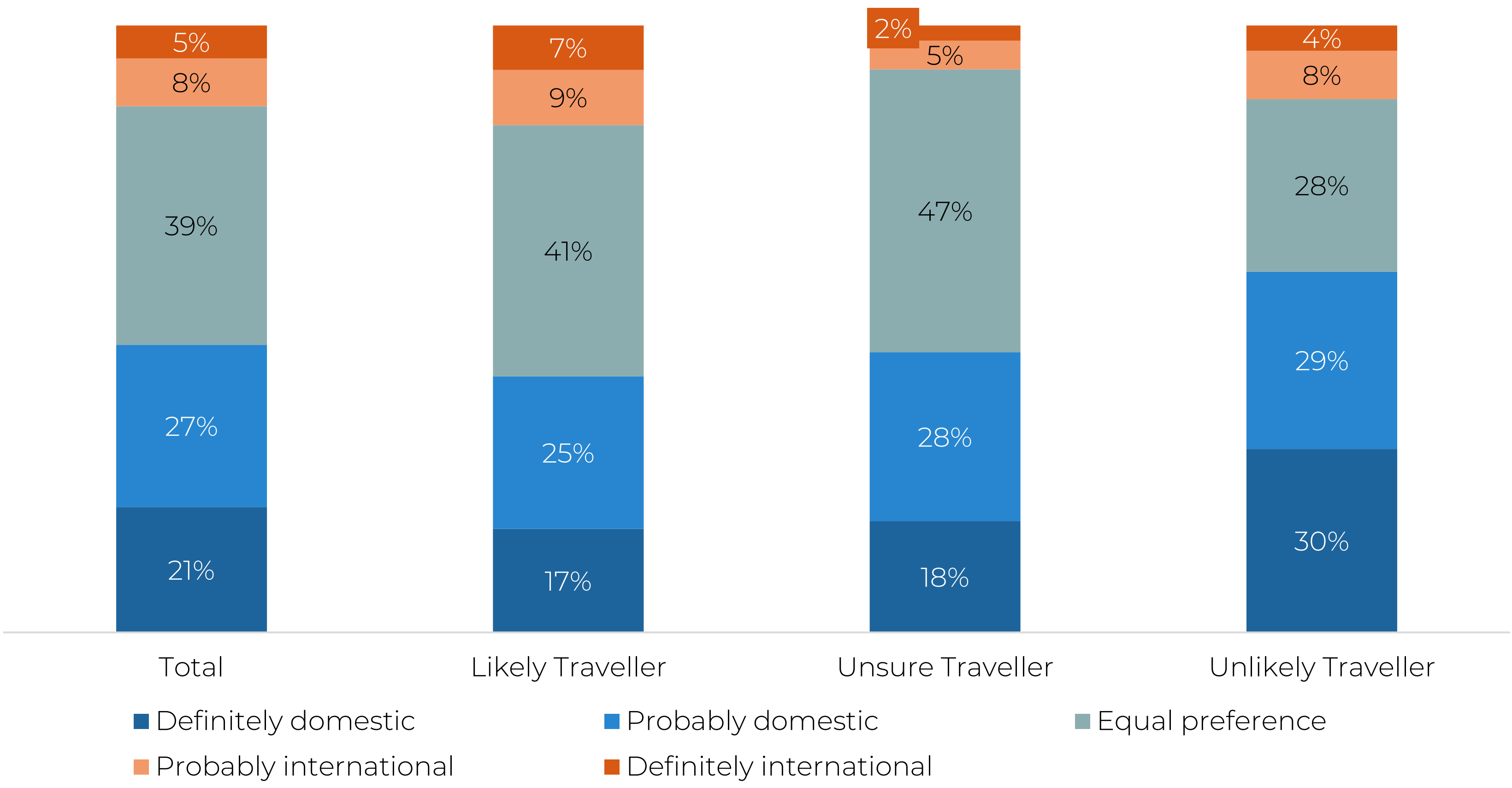
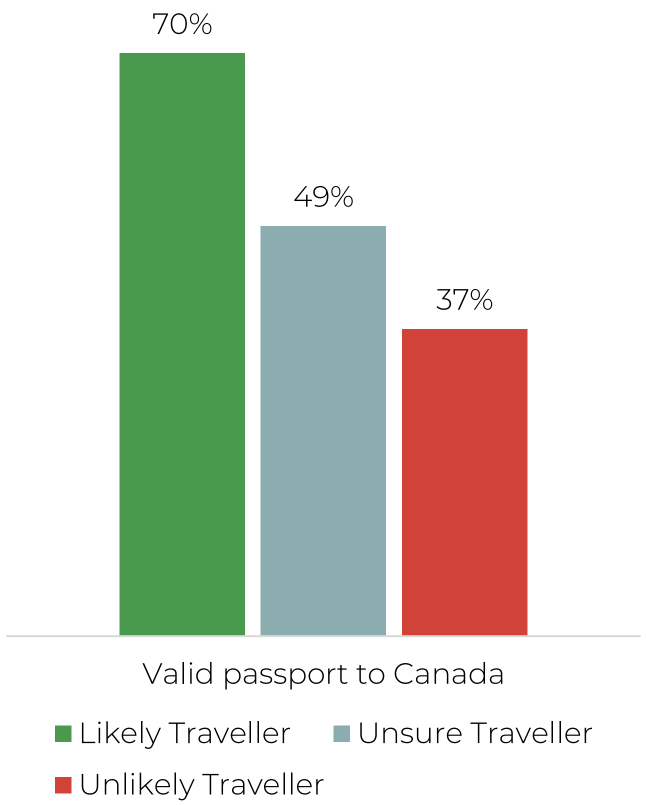
NEXT 12 MONTHS TRAVEL PLANS

Unlikely travellers show a much higher likelihood of domestic travel and indicate a much lower possession of Canadian travel documents. This again suggests general travel preferences driving lower likelihood of Canadian travel.

Domestic / International Travel Intentions



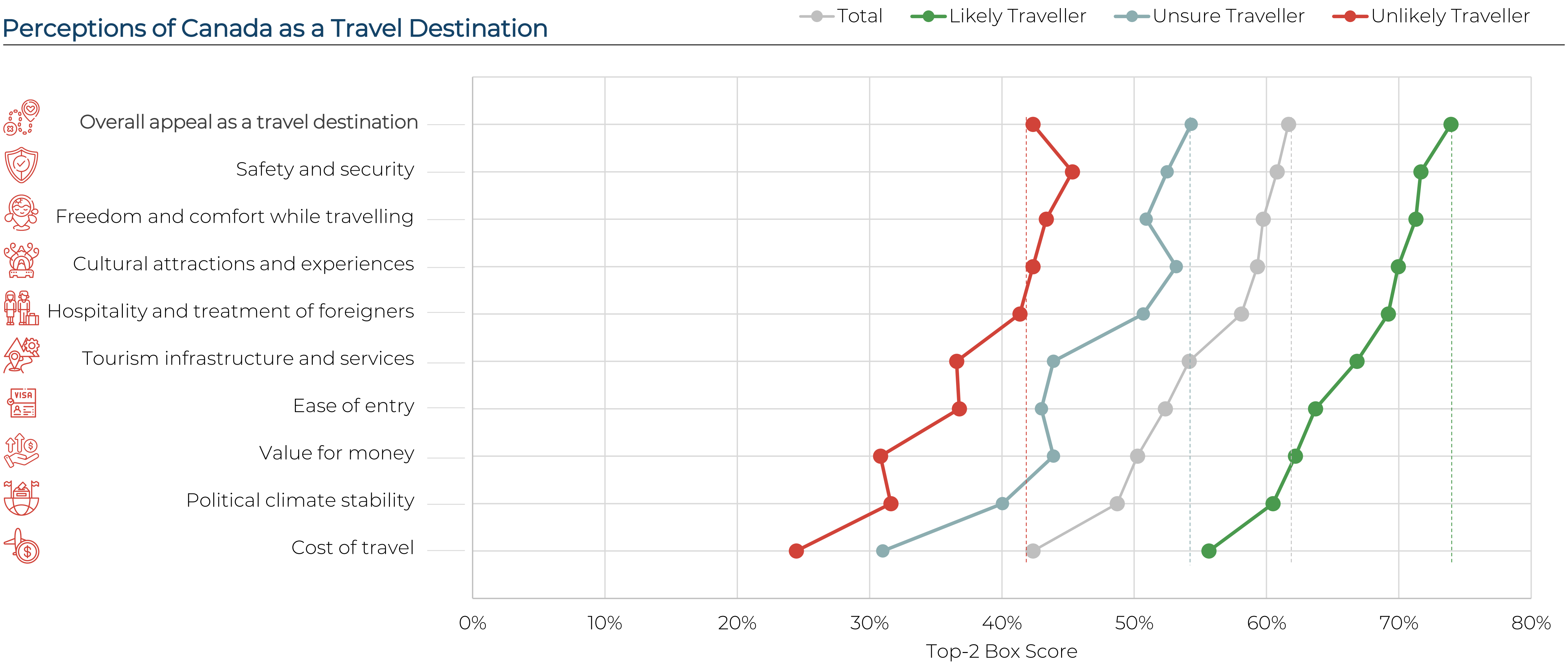


In 2025–2026, are you more likely to travel domestically (within the U.S.) or internationally?

CANADA BRAND PERCEPTIONS

Unlikely travellers generally are much less inclined to view Canada as an appealing travel destination. Together with previous insights, this suggests that the rejection of Canada as a destination is a more general perception, rather than driven by current events.

Perceptions of Canada as a Travel Destination

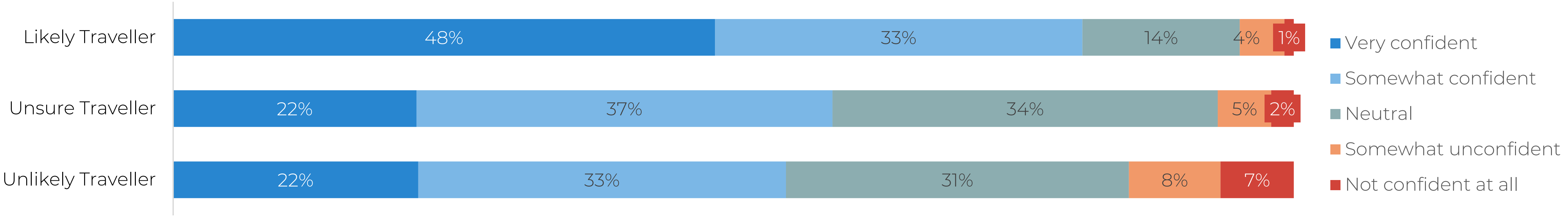


For each province/territory you are somewhat or very familiar with, how likely are you to travel to it in the next 12 months?

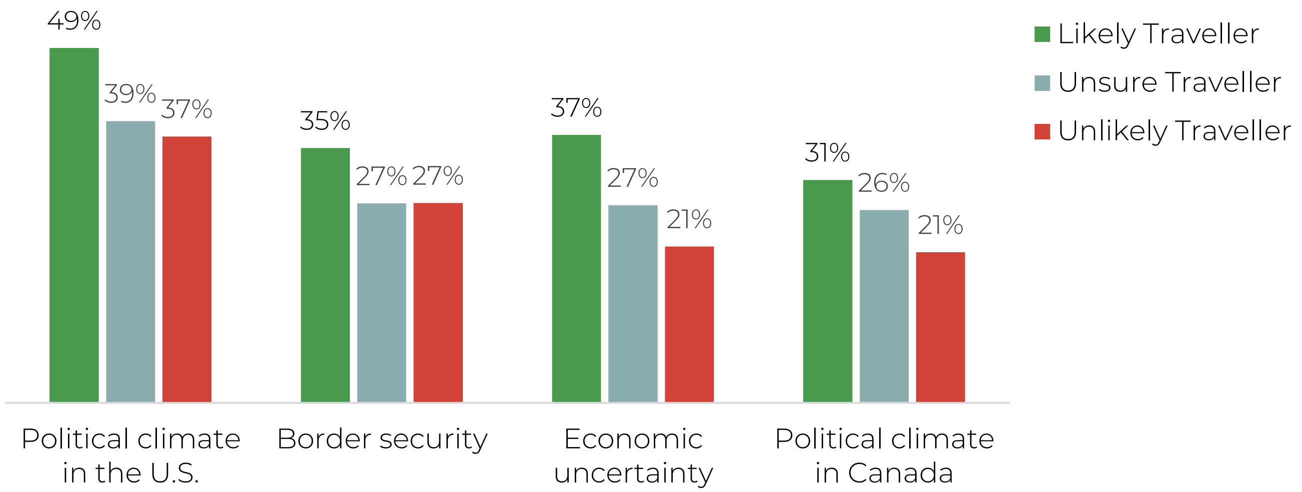
SAFETY, BORDER, AND GEOPOLITICAL CONCERNS

While Likely travellers have more confidence in the safety and stability of travelling to Canada, they are also more likely across the board to have concerns about travelling there; indicating potential apathy among unlikely travellers.

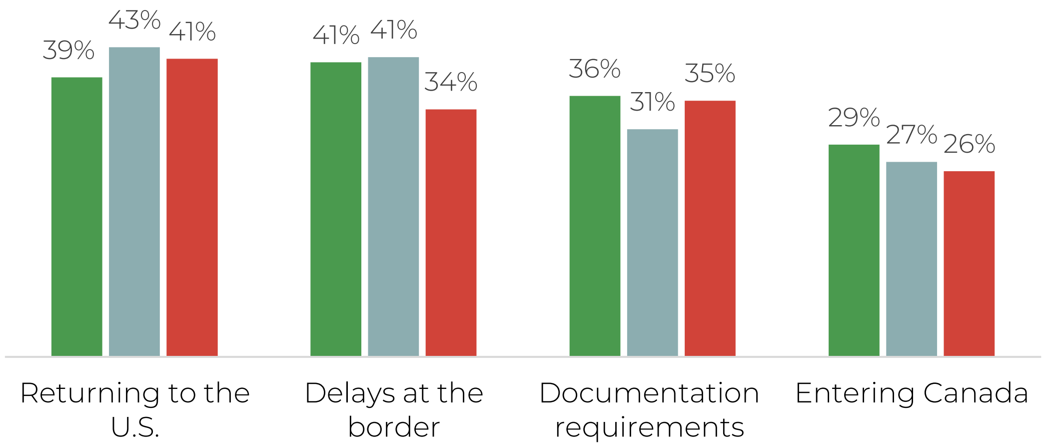
Confidence in safety and stability of travelling to Canada



Concerns about travelling to Canada



Concerns about US/Canada border



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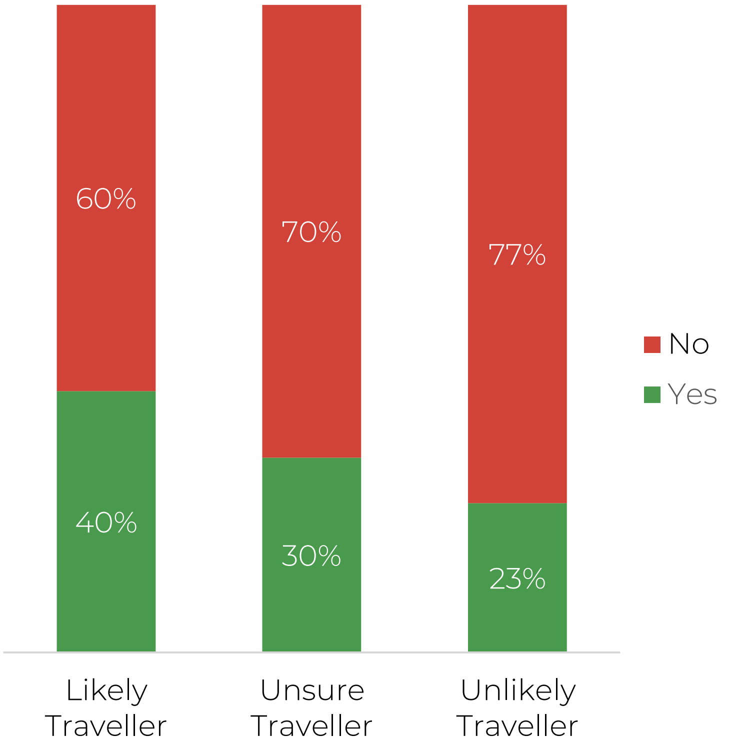
How confident are you in the safety and stability of traveling to Canada in 2025?
How concerned are you about the following when considering travel to Canada?
Which of the following are you concerned about crossing the U.S.-Canada border?

SAFETY, BORDER, AND GEOPOLITICAL CONCERNS

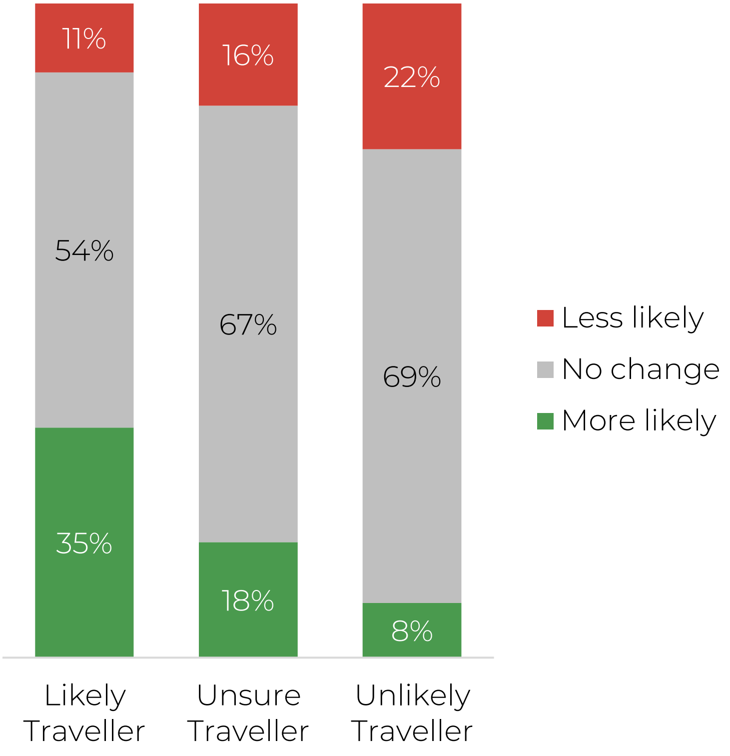
Unlikely travellers claim to be much less influenced by current events, underscoring a more general apathy towards Canada than a specific current rejection.

Impact of current environment on Canada travel intent

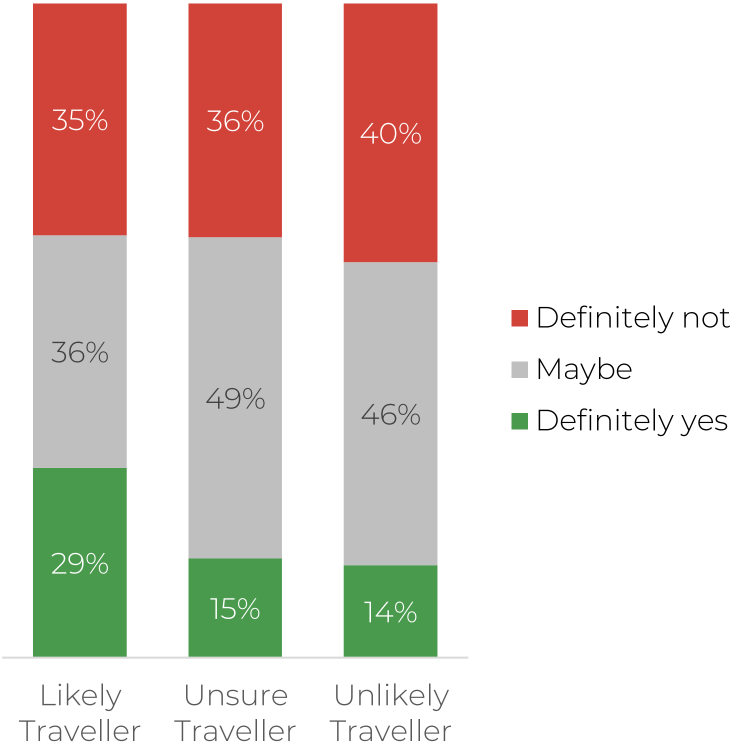
Influence of recent political events on Canada travel intent



Impact of Trump's presidency on Canada travel intent



Change in Canada travel perceptions post Trump

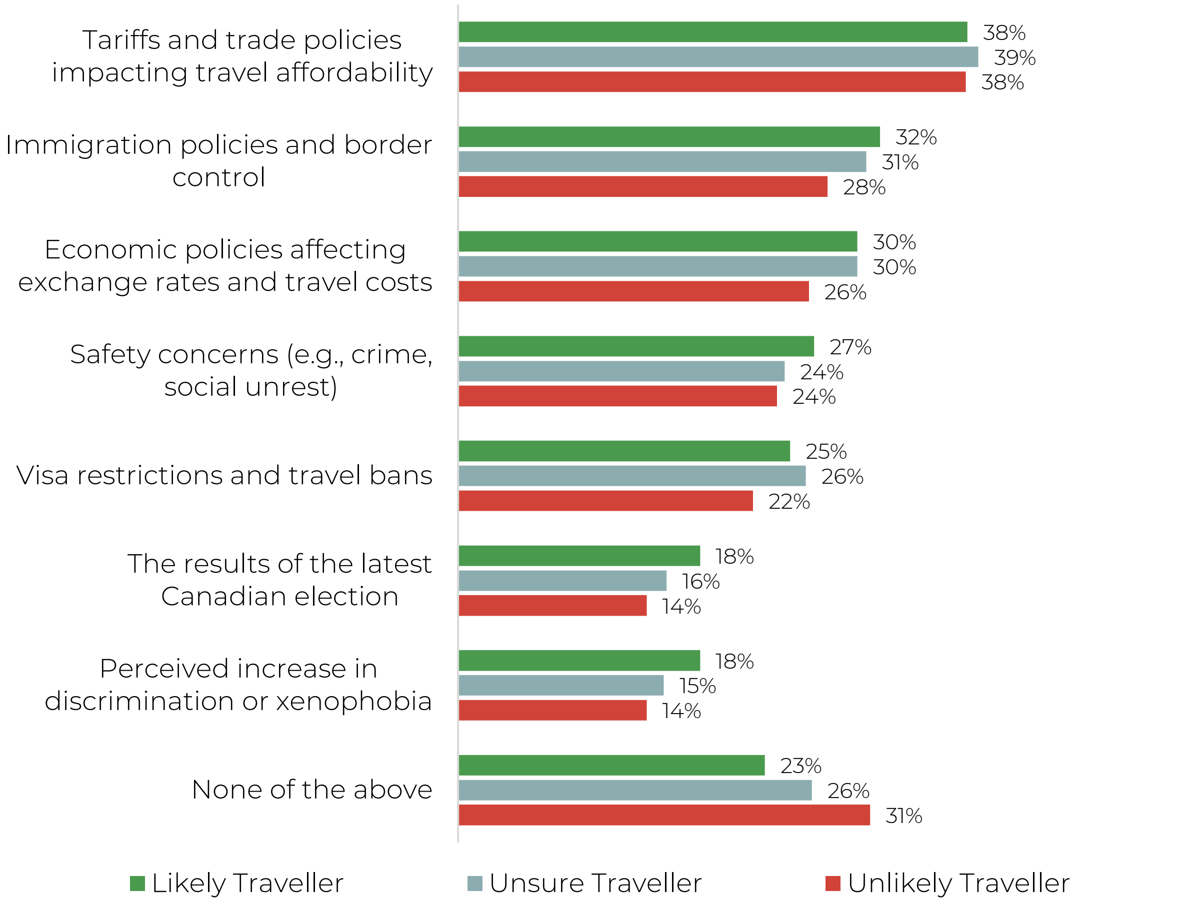


Has your interest in visiting Canada been influenced by recent political events or leadership (e.g., under the Trump administration)?
Has Donald Trump's presidency made you more or less likely to visit Canada in the next 12 months?
Do you think your perceptions of traveling to Canada will change after Trump's presidency?

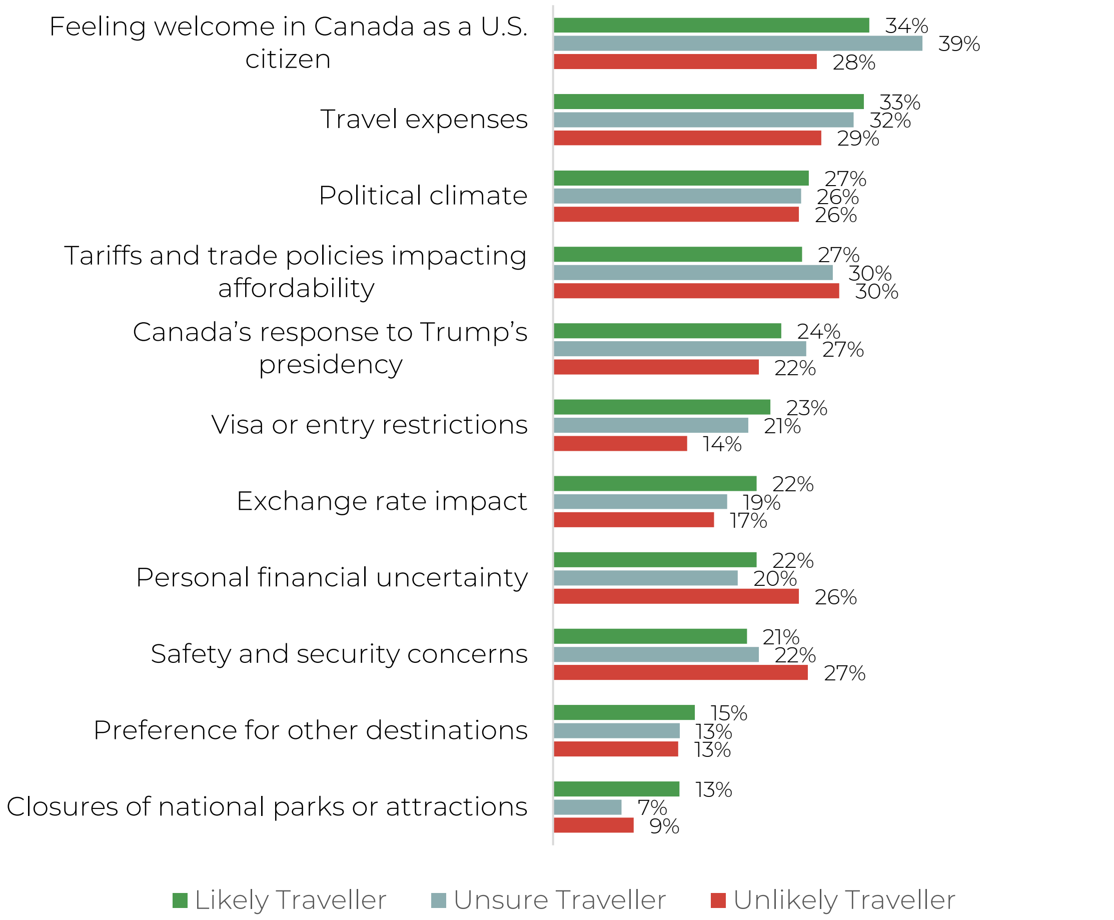
SAFETY, BORDER, AND GEOPOLITICAL CONCERNS

Tariffs and trade policies are top of mind for all travellers. Unlikely travellers are more likely however to claim that current political events are not influencing their travel intentions, and are much less concerned about feeling unwelcome as a US citizen in Canada.

Most influential events impacting Canada travel intent



Key influencers of change in likelihood to visit Canada



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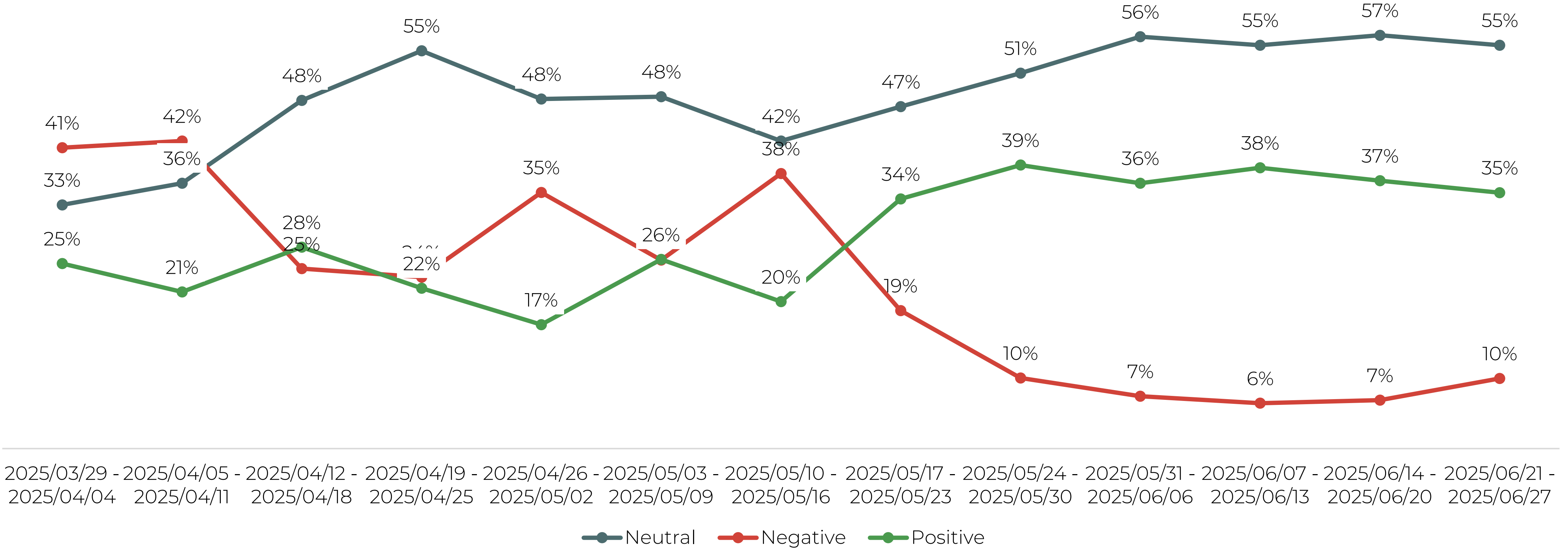
How confident are you in the safety and stability of traveling to Canada in 2025?
How concerned are you about the following when considering travel to Canada?

CONVERSATION DRIVERS

April saw significantly negative sentiment among US social media users towards Canadian travel, with negative sentiment often associated with Trump and tariffs. Negative sentiment has dropped considerably from mid-May to end of June.

Digital Sentiment in the US towards Canadian travel & tourism by week



Top Keywords												
• Trump • Tariffs	• Trump • Travel	• Tourism • Travel	• Trump • Canadian	• Trump • Travel	• Travel • Trump	• Trump • Travel	• Travel • Visit	• Visit • Travel	• Visit • Travel	• Travel • Visit	• Travel • Visit	• Travel • Visit

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CONVERSATION DRIVERS

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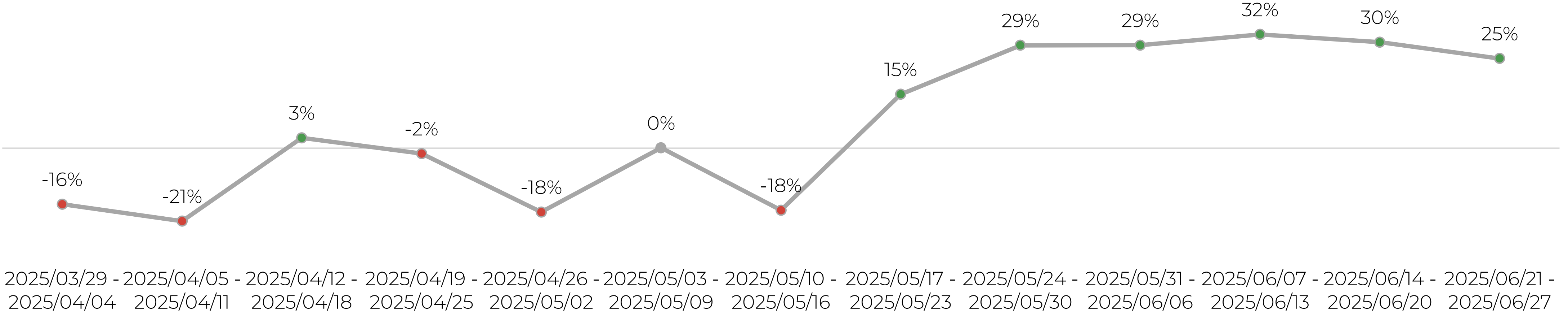
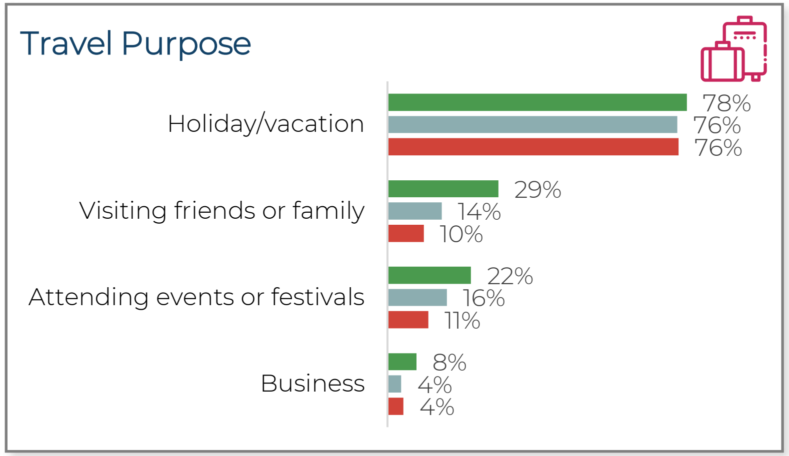


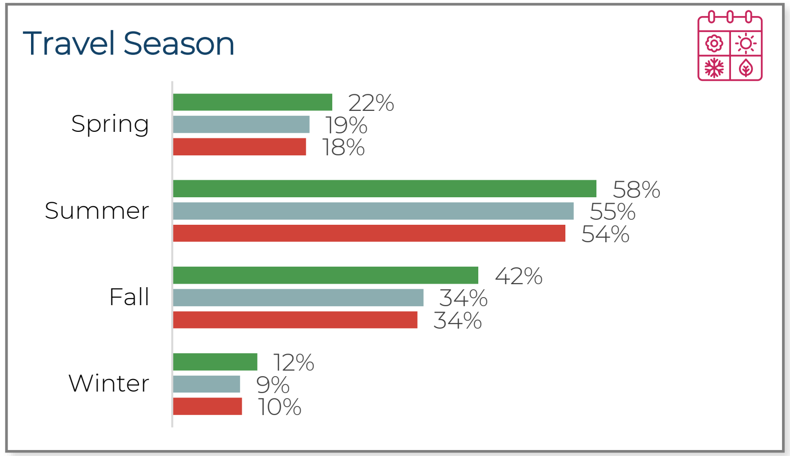
	2025/03/29 - 2025/04/04	2025/04/05 - 2025/04/11	2025/04/12 - 2025/04/18	2025/04/19 - 2025/04/25	2025/04/26 - 2025/05/02	2025/05/03 - 2025/05/09	2025/05/10 - 2025/05/16	2025/05/17 - 2025/05/23	2025/05/24 - 2025/05/30	2025/05/31 - 2025/06/06	2025/06/07 - 2025/06/13	2025/06/14 - 2025/06/20	2025/06/21 - 2025/06/27
Top Keywords	• Trump • Tariffs	• Trump • Travel	• Tourism • Travel	• Trump • Canadian	• Trump • Travel	• Travel • Trump	• Trump • Travel	• Travel • Visit	• Visit • Travel	• Visit • Travel	• Travel • Visit	• Travel • Visit	• Travel • Visit
Key Events	• 25% tariff to address “non-reciprocal trade arrange-ments”	• Tariffs on Canadian imports take effect	• Ongoing trade tensions with Canada’s retaliatory measures		• Annexation rhetoric fuels Canadian nationalism	• Trump praises Canada and Carney, calls for friendship	• U.S. official blames Canada for escalating tensions	• Trade tensions persist with ongoing tariffs	• Preparations for G7 Summit in Canada	• Canada cancels U.S. tech tax, pauses trade talks	• Targets Canadian film production as trade issue	• Trump attends G7 Summit, discussions “constructive”	• Trump terminates trade talks over Canada’s tech tax
	• Canada would **“cease to exist”** without U.S. support	• **No specific new comments**	• **No specific new comments**	• Suggests Canada as **“51st state”** for tax and military benefits	• **No specific new comments**	• Questions 1908 border treaty, **suggests Canada join U.S.**	• Trump claims U.S. **doesn’t need Canadian trade**	• **No specific new comments**	• **No specific new comments**	• **No specific new comments**	• U.S. official criticizes Canada’s **“socialist regime”**	• **No specific new comments**	• Announces new tariffs, calls Canada **“difficult to trade with”**

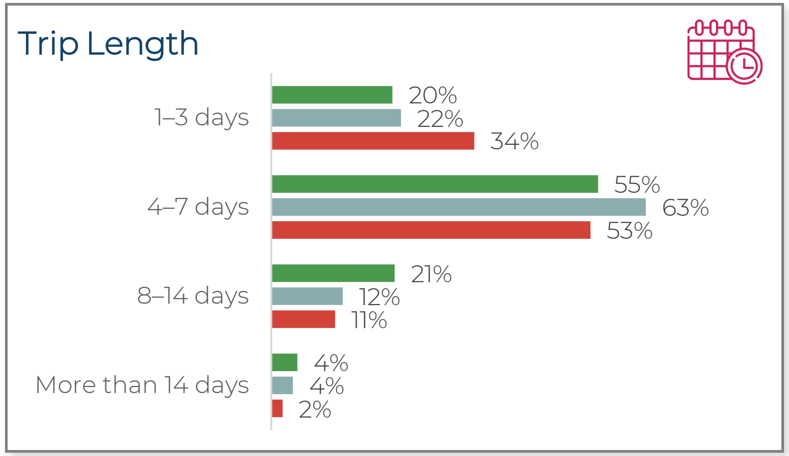
CANADA TRAVEL INTENTIONS

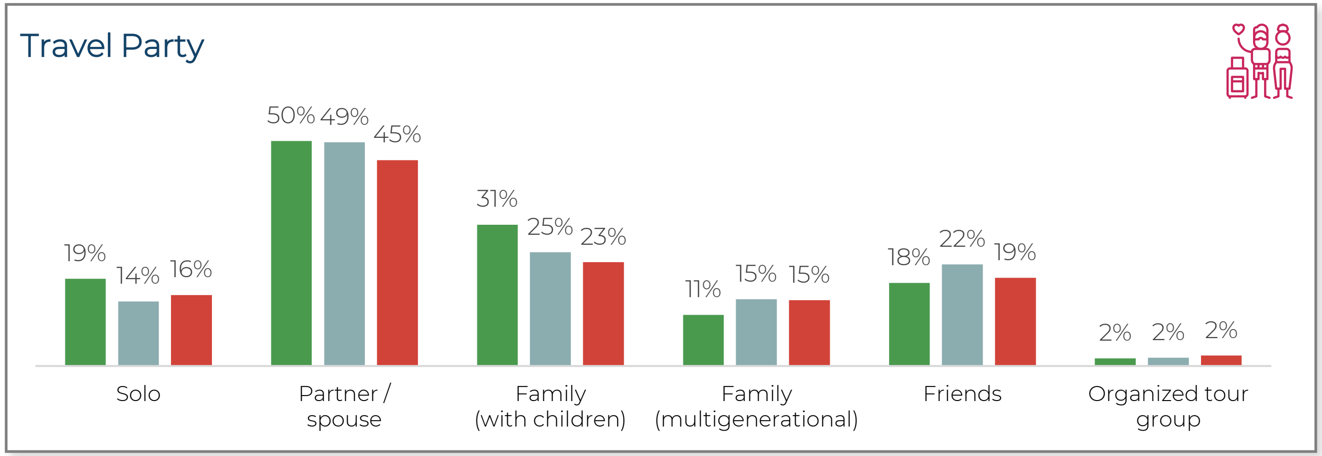
Holiday travel would be the primary reason for travel to Canada among all traveller groups. Unlikely travellers would be more inclined to stay for a shorter period of time, while likely travellers will stay longer and spend more.

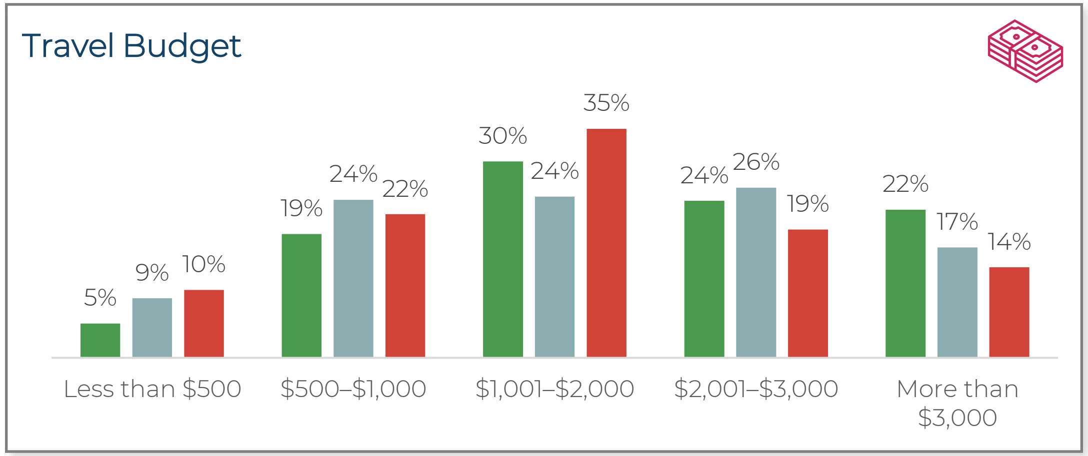
Canada Travel Parameters











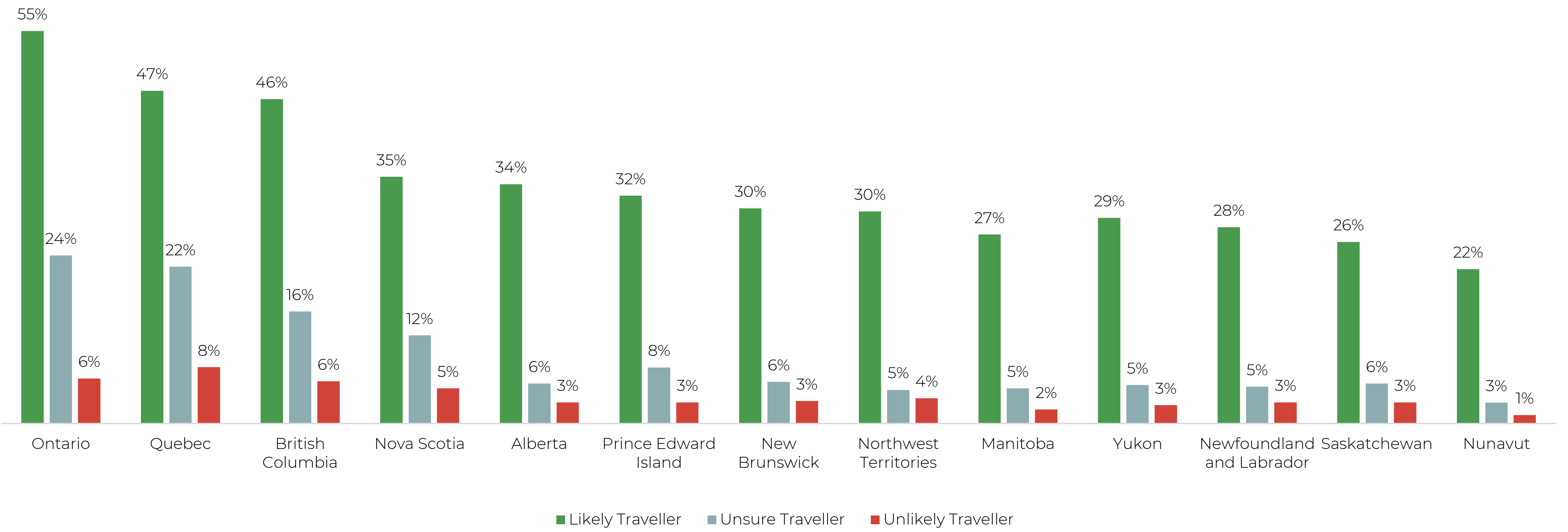
What type of travel would you be planning to Canada? (Select all that apply)
When are you most likely to travel to Canada? (Select all that apply)
How long would you likely stay in Canada for a trip?

Who would you likely travel to Canada with? (Select all that apply)
What is your estimated budget for a trip to Canada (excluding flights)?

CANADA TRAVEL INTENTIONS

Ontario, Quebec, and BC are the most likely provinces to be travelled to in the next 12 months, with Quebec showing slightly more appeal within the Unlikely Traveller group.

Canadian Regional Travel Intentions (Top-2 Box Score)



For each province/territory you are somewhat or very familiar with, how likely are you to travel to it in the next 12 months? (Rebased to total sample)

CANADA TRAVEL INTENTIONS

Midwest USA is generally least likely to travel to any Canadian region. Most regions will get the majority of their visits from the Northeast, with some notable exceptions drawing from the South and West.

Canadian Regional Travel Intentions (Top-2 Box Score)

Low Travel Intention — High Travel Intention

	Total	Northeast	Midwest	South	West
Ontario	22%	27%	21%	22%	21%
Quebec	17%	25%	13%	17%	16%
British Columbia	16%	14%	12%	16%	25%
Nova Scotia	11%	13%	7.3%	14%	11%
Alberta	9.1%	7.6%	7.3%	9.8%	11.4%
New Brunswick	7.9%	10%	5.9%	8.3%	8.1%
Prince Edward Island	8.4%	10%	6.5%	8.3%	8.7%
Manitoba	7.0%	6.4%	6.7%	7.1%	7.5%
Saskatchewan	6.5%	6.8%	4.8%	7.0%	7.4%
Newfoundland and Labrador	6.9%	7.8%	6.1%	7.8%	5.6%
Yukon	6.9%	6.8%	5.1%	8.4%	6.7%
Northwest Territories	7.7%	6.9%	7.8%	8.6%	6.6%
Nunavut	4.9%	6.5%	3.4%	5.6%	4.4%
Toronto	22%	26%	21%	22%	21%
Niagara	14%	17%	13%	14%	10%
Northern Ontario	6.8%	5.8%	6.8%	7.3%	6.9%
Southeastern Ontario	5.7%	6.3%	5.4%	6.0%	5.3%

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For each province/territory/sub-region you are somewhat or very familiar with, how likely are you to travel to it in the next 12 months? (Rebased to total sample)

KEY TAKE-OUTS

Insight 1: The unlikely traveller: Apathy rather than rejection

- Resistance to Canadian travel from the US is predominantly driven by individual considerations, rather than external factors like the political climate or current events.
  - Those who indicate they are unlikely to travel to Canada in the next 12 months show a lower likelihood for international travel in general, a higher inclination towards domestic travel, and a higher likelihood of not having sufficient travel documents.
  - This points generally to a more apathetic attitude towards cross-border travel in general, than actively rejecting Canada as a destination.
- While it is true that these “unlikely travellers” generally perceive Canada to be less appealing as a destination and perceives all other attributes lower compared to the average traveller, this is still likely better explained by a general apathy towards cross-border travel.

KEY TAKE-OUTS

Insight 2: Tariffs and trade policies are the greatest external influences

- While it seems that the majority of unlikely travellers have an underlying travel apathy, there is a reasonable proportion of these travellers that indicate that their likelihood has decreased over the past 12 months.
  - It should be noted that the converse of a much larger group of likely travellers is also true. These travellers claim a much larger proportion of those that have increased their likelihood of travel to Canada over the past 12 months.
- Unlikely travellers, when prompted, indicate the US political climate as being the highest concern for travelling to Canada.
  - In general, it should be noted that these travellers state less concerns across the board than likely travellers. This again could point to their general travel apathy – they are more likely to not give these concerns any thought because they have little cross-border travel intentions generally.
- A further driver of perceived barriers to Canadian travel is the situation surrounding tariffs and trade policies. This is stated as the highest contributor for unlikely travellers impacting their intent as well as change from previous travel intent.
- As a secondary concern, especially to those travellers who are unsure about their travel intentions to Canada, is the perception of possibly not being welcome in Canada as a US citizen. Some concerns also exist over being able to return to the US and border delays.

KEY TAKE-OUTS

Insight 3: Short-term Imperatives

- The primary drivers of lower likelihood of Canadian travel among US citizens are largely outside the control of short-term tactics: travel apathy requires sustained effort to change behaviour, and the political climate as well as trade policies are uncontrollable external factors.
- Given that the major concerns or barriers of travel to Canada are actually perceived more by those who are likely to travel to Canada, it is worth ensuring that these barriers are actively addressed to allay any concerns and encourage unsure travellers to reconsider.

Highlight strengths

Promote Canada's safety, cultural attractions, hospitality, and comfort to appeal to likely and unsure travellers, countering apathy-driven perceptions.

Address barriers

Use clear messaging to ease concerns about border processes and affordability, especially in light of tariff-related cost perceptions.

Target key seasons and destinations

Focus on Summer and Fall family vacations (1-week or less) in major destinations like Toronto and Vancouver, where familiarity is higher.

Manage digital sentiment

Counter negative social media sentiment from US policy statements with positive promoted content to improve perceptions and encourage travel.

3

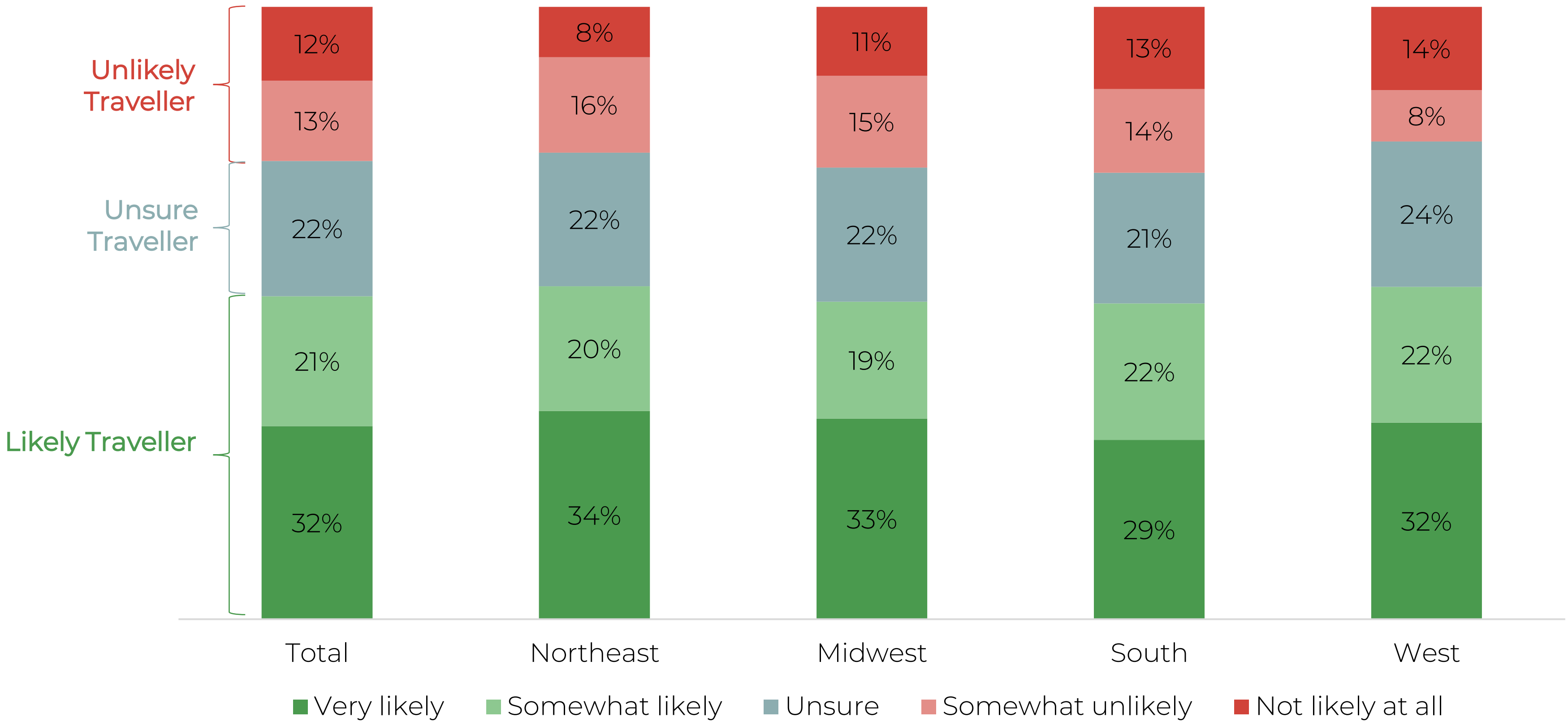
CHAPTER 2

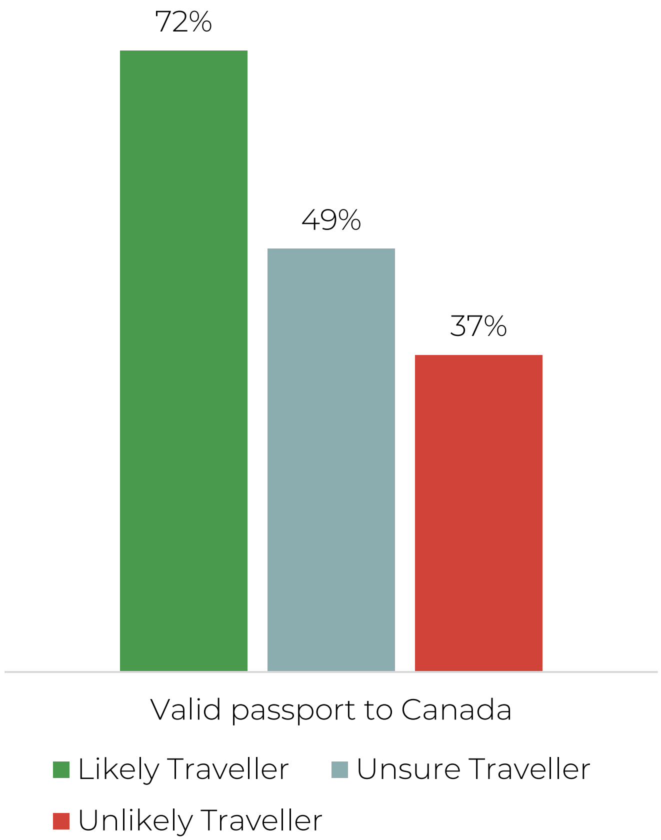
Medium to Long-term Strategic Opportunities

GENERAL TRAVEL INTENTIONS

Likelihood of travelling to Canada is at least in part correlated with having valid travel documents, indicating lower likelihood is more related to destination apathy than rejection.

Likelihood to travel to Canada in the next 12 months



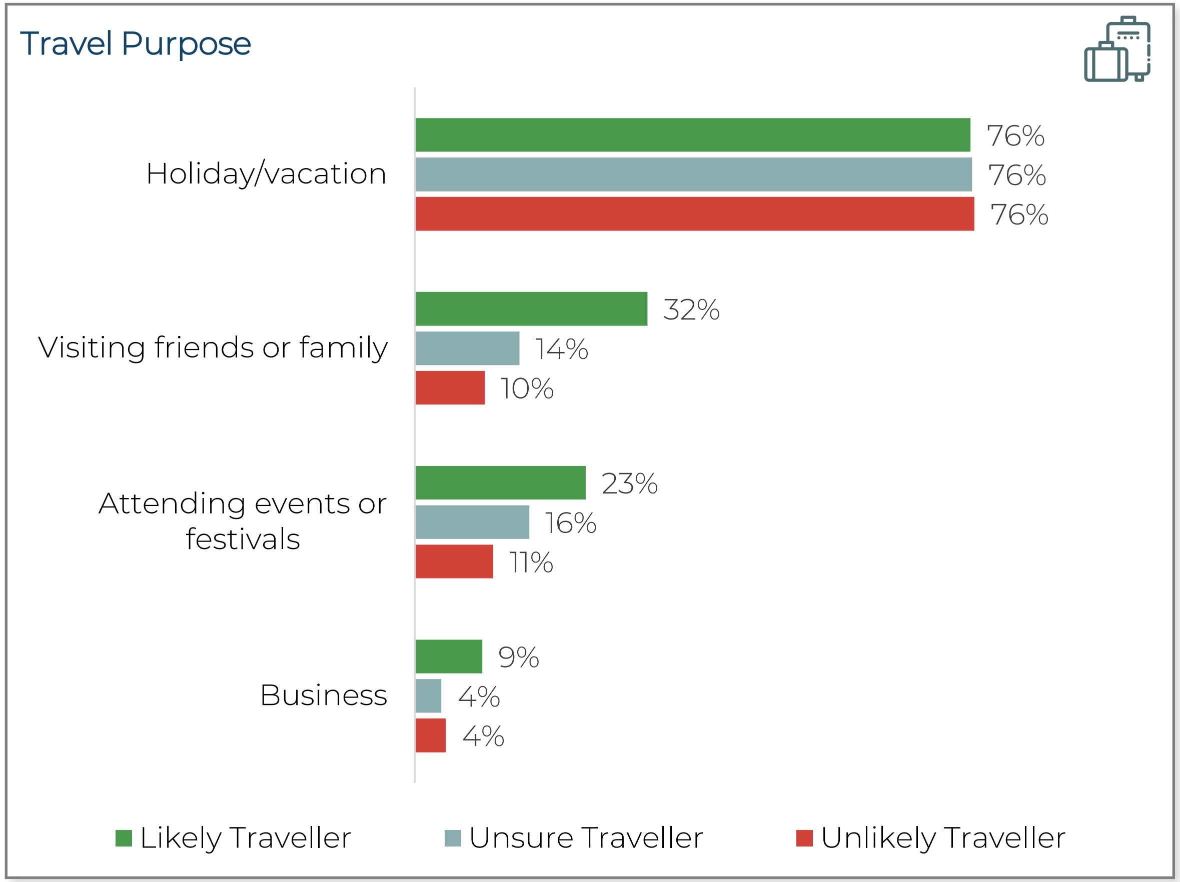


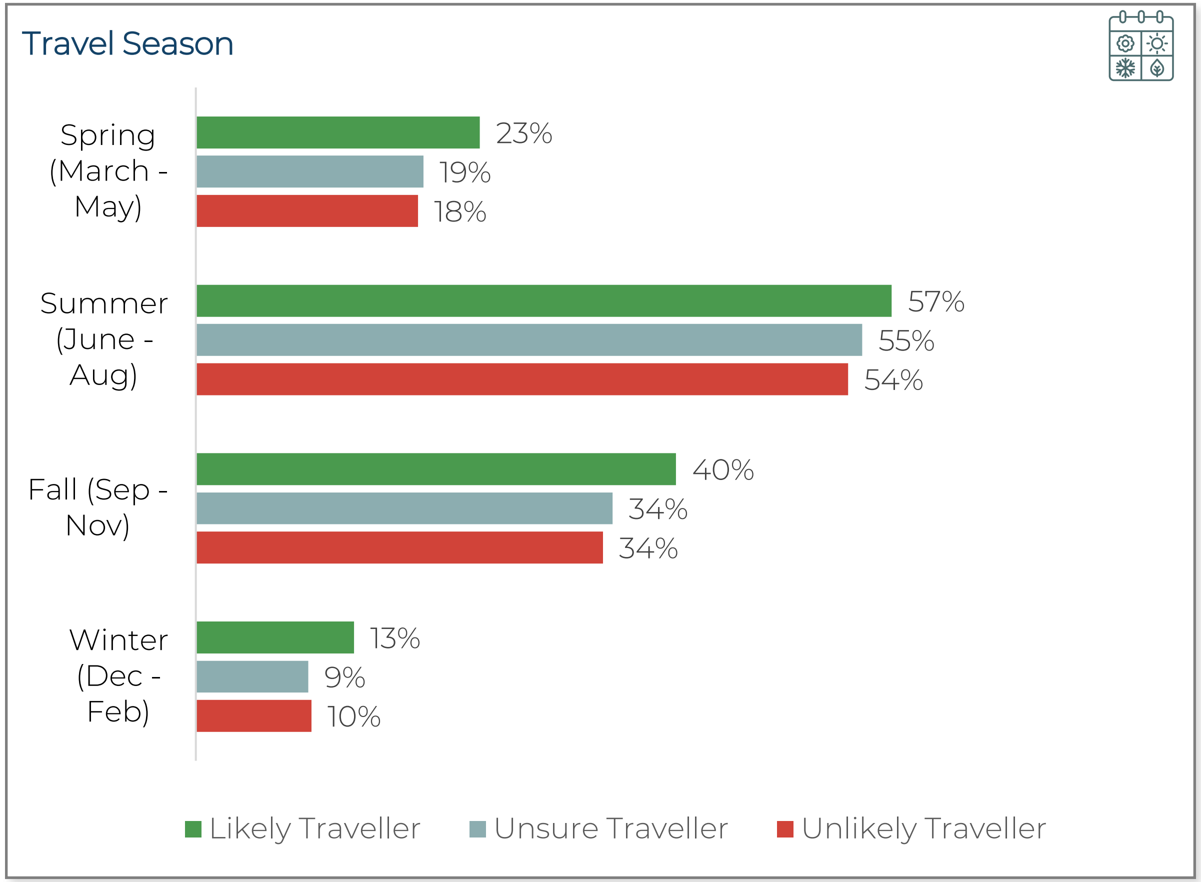
How likely are you to travel to Canada in the next 12 months?

GENERAL TRAVEL INTENTIONS

Holiday travel during the Summer or Fall are the primary drivers of visiting Canada by US travellers.

Canada Travel Purpose and Timing





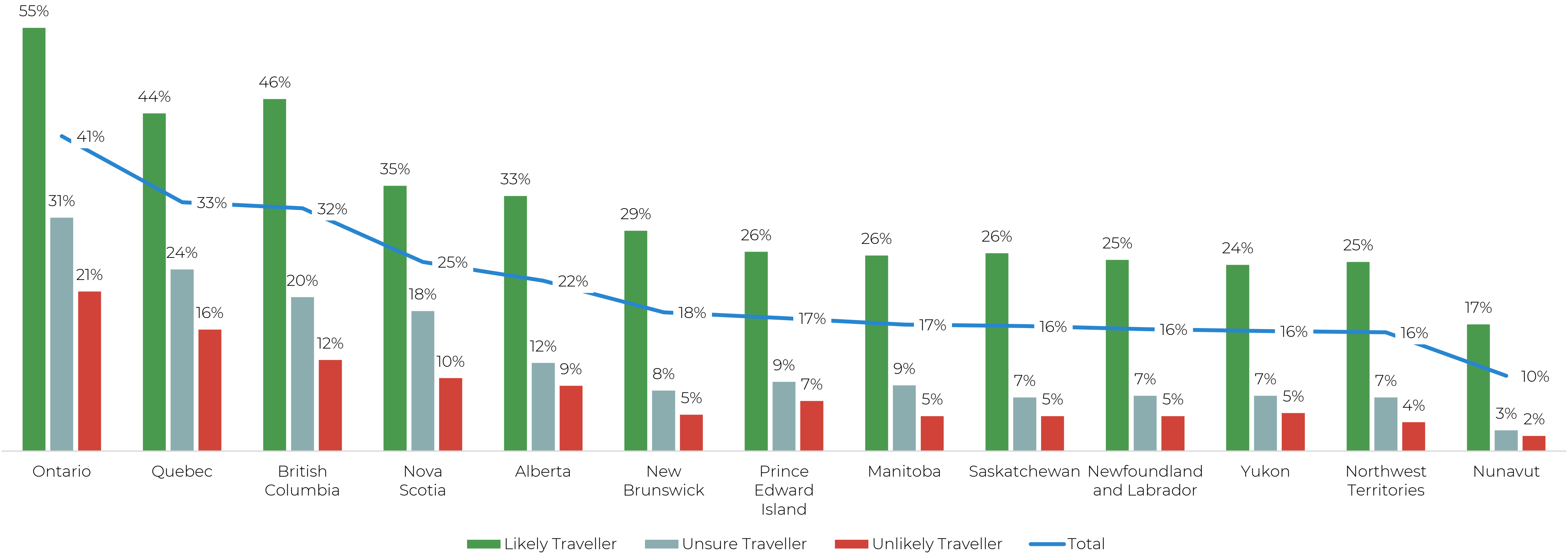
What type of travel would you be planning to Canada? (Select all that apply)
When are you most likely to travel to Canada? (Select all that apply)
How long would you likely stay in Canada for a trip?

Who would you likely travel to Canada with? (Select all that apply)
What is your estimated budget for a trip to Canada (excluding flights)?

DESTINATION FAMILIARITY

Likely travellers claim significantly higher familiarity with all Canadian provinces or territories, proving again that destination familiarity is a primary driver of travel intent.

Canadian Regional Familiarity (Top-2 Box Score)



How familiar are you with the following Canadian provinces/territories in relation to tourism?

DESTINATION FAMILIARITY

Destination familiarity is generally highest in Northeast US and lowest in the Midwest. Some exceptions are evident for more rural areas that are more familiar in the Southern US and selected regions in the West.

Canadian Regional Familiarity (Top-2 Box Score)

Low Familiarity — High Familiarity

	Total	Northeast	Midwest	South	West
Ontario	41%	49%	40%	40%	37%
Quebec	33%	43%	27%	32%	31%
British Columbia	32%	27%	28%	31%	40%
Nova Scotia	25%	30%	21%	26%	22%
Alberta	22%	19%	21%	23%	25%
New Brunswick	18%	22%	14%	19%	17%
Prince Edward Island	17%	21%	15%	17%	18%
Manitoba	17%	14%	17%	18%	17%
Saskatchewan	16%	17%	15%	17%	17%
Newfoundland and Labrador	16%	18%	15%	17%	13%
Yukon	16%	15%	13%	18%	16%
Northwest Territories	16%	14%	15%	17%	16%
Nunavut	10%	12%	8%	11%	9%
Toronto	39%	48%	39%	38%	36%
Niagara	25%	32%	25%	25%	20%
Northern Ontario	16%	14%	16%	16%	15%
Southeastern Ontario	13%	14%	12%	14%	11%

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How familiar are you with the following Canadian provinces/territories/sub-regions in relation to tourism?

DESTINATION FAMILIARITY

Cost of travel is a significant concern across all provinces, while the three major provinces generally have much better perceptions than the smaller territories.

Improvements required by province (Top-2 Box Score)

Significant Improvement Required — Little Improvement Required

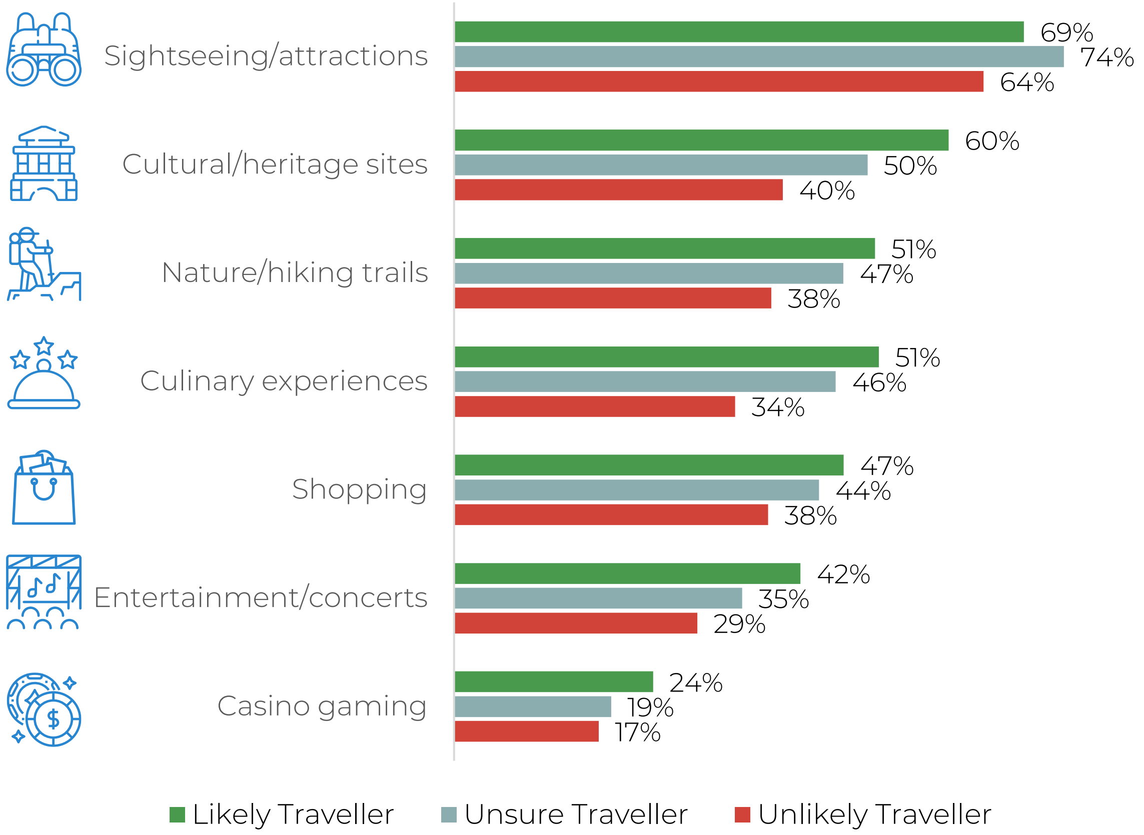
	Online travel agency representation	Accommodation and tourism packages	Cost of travel	Transportation options	Access to information	Accommodation options	Activity options	Travel Experience
Ontario	45%	43%	34%	43%	48%	46%	45%	46%
Quebec	42%	40%	33%	42%	46%	50%	47%	47%
British Columbia	41%	44%	36%	40%	41%	40%	40%	40%
Nova Scotia	32%	38%	38%	35%	34%	38%	39%	41%
Alberta	31%	34%	27%	32%	40%	38%	37%	38%
New Brunswick	31%	28%	32%	36%	39%	32%	32%	35%
Prince Edward Island	38%	39%	33%	28%	31%	31%	32%	39%
Manitoba	40%	48%	35%	34%	45%	35%	34%	48%
Saskatchewan	32%	32%	27%	36%	41%	36%	36%	32%
Newfoundland and Labrador	31%	30%	29%	27%	39%	32%	32%	34%
Yukon	33%	25%	21%	30%	30%	30%	27%	34%
Northwest Territories	29%	26%	27%	30%	31%	33%	33%	32%
Nunavut	30%	27%	37%	24%	27%	33%	23%	27%

For each province/territory that you are somewhat or very familiar with, please rate the degree of improvement required in the following areas related to tourism

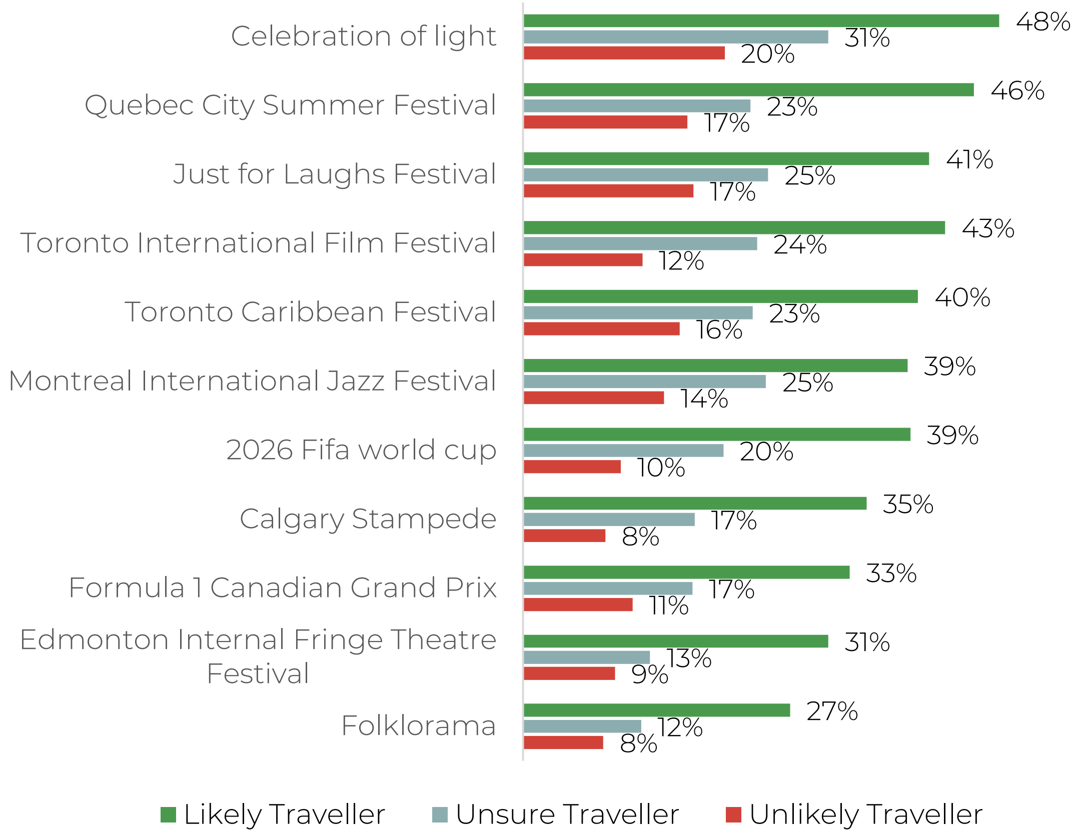
TRAVEL NEEDS

Sightseeing is the primary activity interesting all traveller groups, and could be a lever to convert uncertain travel to likely travel.

General activity interest



Canada Specific Event Interest (Top-2 Box Score)

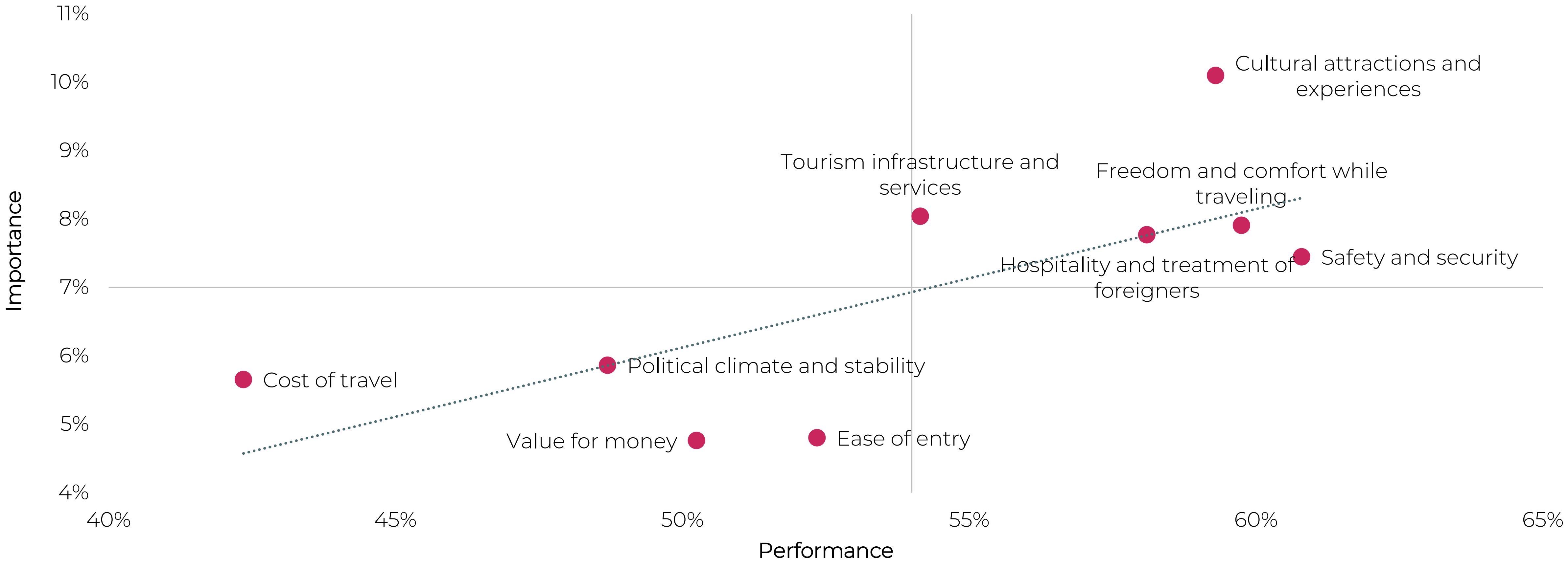


Which activities or experiences interest you most when considering visiting Canada?
How interested are you in attending the following major events in Canada?

DRIVERS OF DESTINATION APPEAL

Canada's overall appeal as a destination is strongly driven by cultural attractions, safety, and comfort. Lower performing attributes are also deemed less important – an ideal situation for the destination.

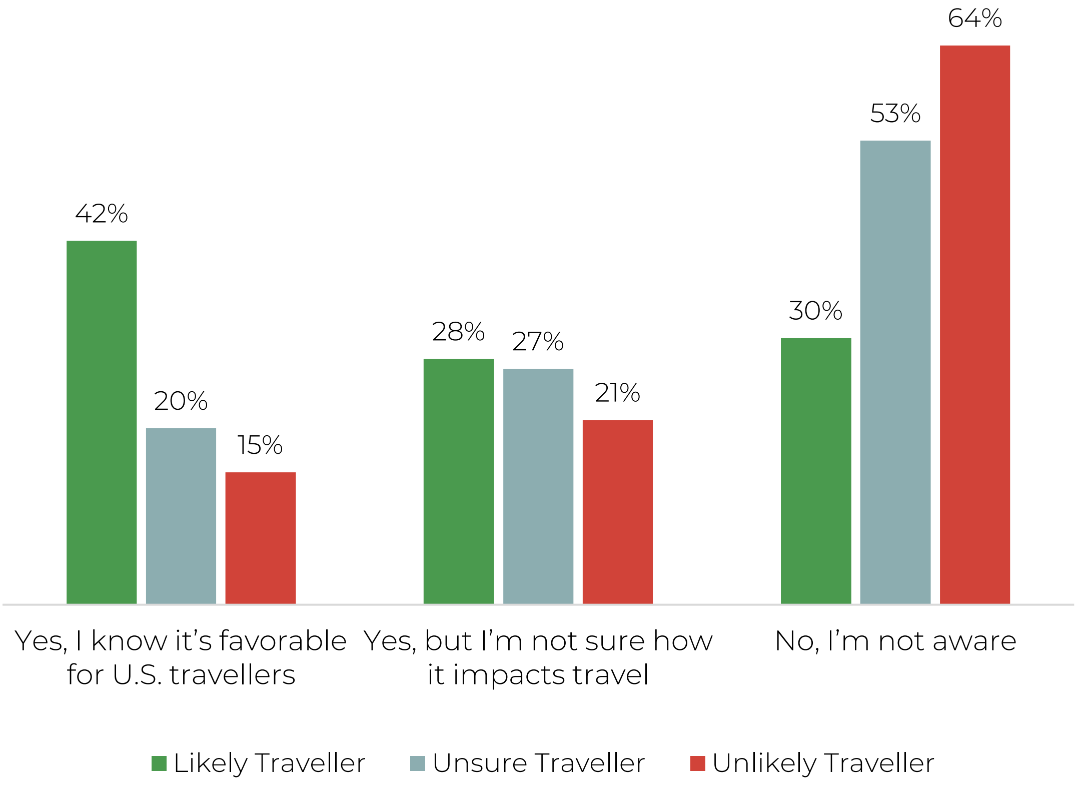
Drivers of destination appeal



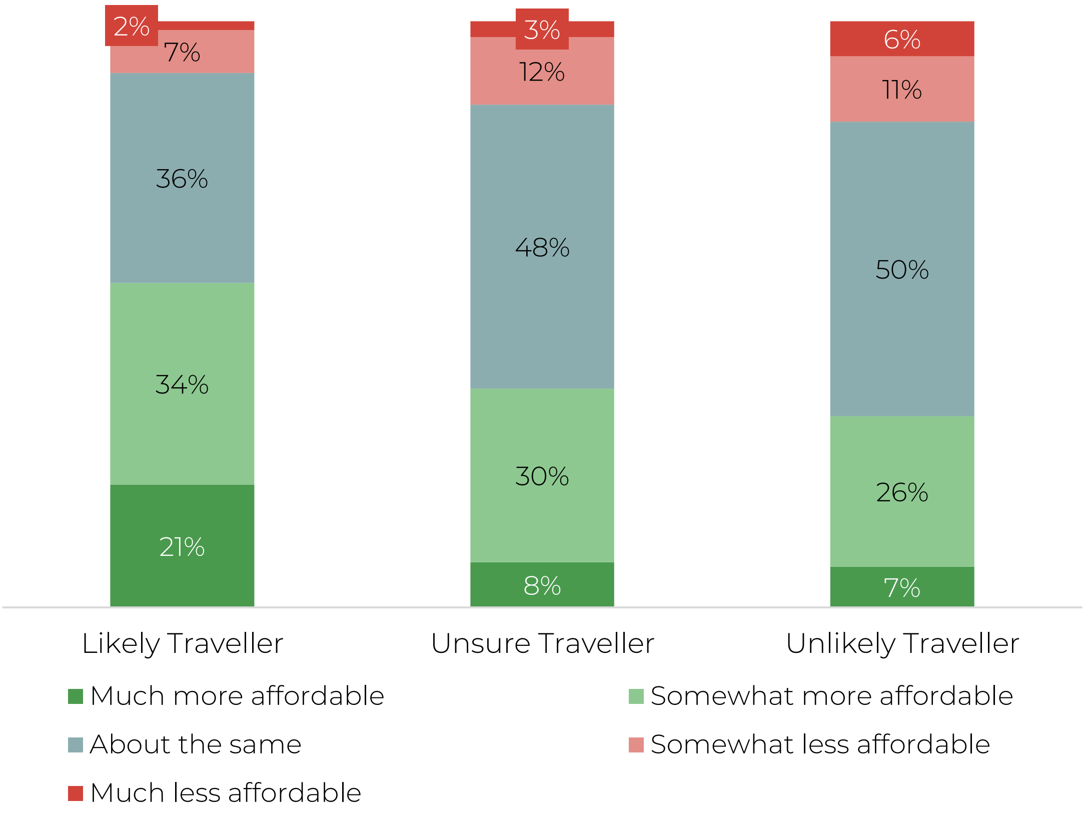
BARRIERS TO CANADIAN TRAVEL

Exchange rate impact is not well-understood and could be a lever to improve travel cost perceptions. That said, relative perceptions of the relative cost of travelling to Canada are generally positive.

Exchange rate awareness



Relative cost perceptions of travelling to Canada



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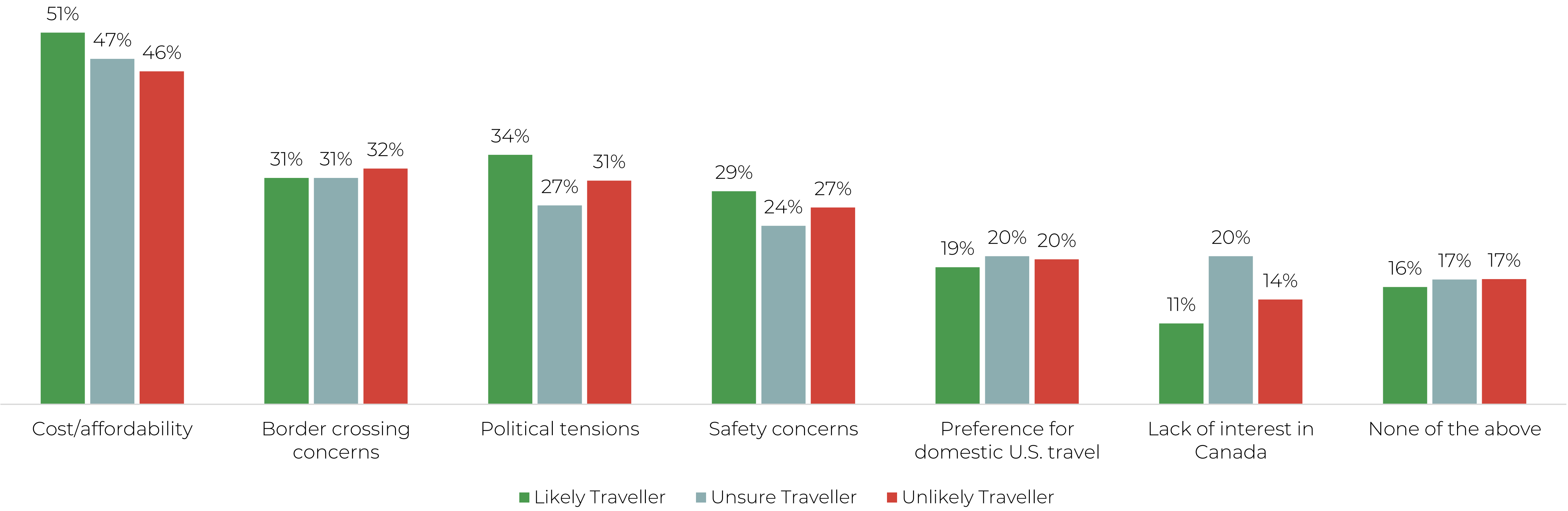
Are you aware of the current exchange rate between the U.S. dollar and the Canadian dollar?
How do you perceive the cost of traveling to Canada compared to other destinations?

BARRIERS TO CANADIAN TRAVEL

At an absolute level however, cost and affordability is seen as the primary barrier to travel, which is likely a general barrier rather than specific to the destination. Politics and safety are lower on the list of concerns.

Barriers to Canadian travel



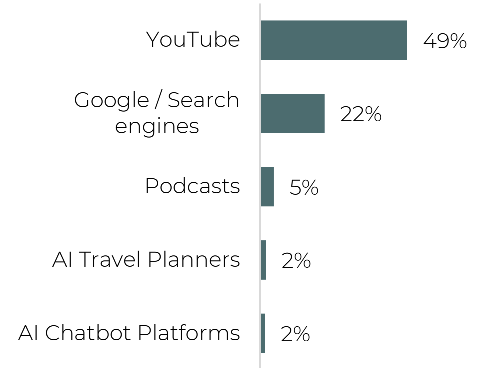
What factors, if any, might prevent you from traveling to Canada?

INFLUENCERS OF CANADIAN TRAVEL

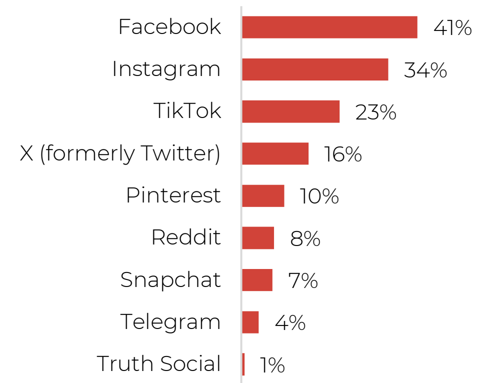
Digital channels, in particular YouTube, are particularly important in influencing destination perceptions. Social media and search can also play an important role, while the impact of traditional media continues to wane.

Media channels influencing Canadian travel perceptions

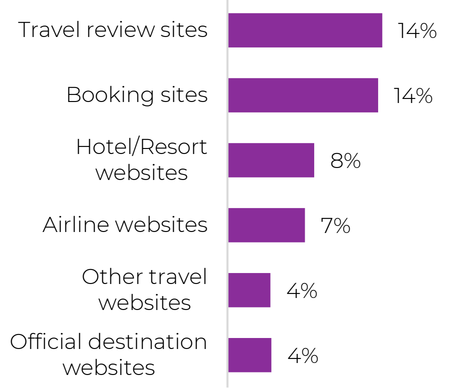
Digital channels



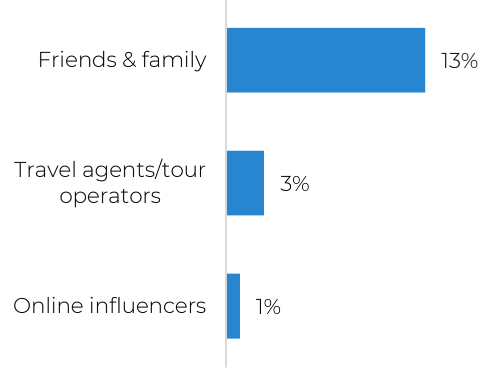
Social media



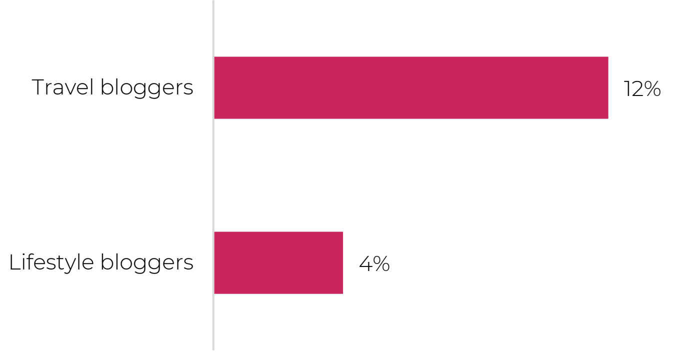
Websites



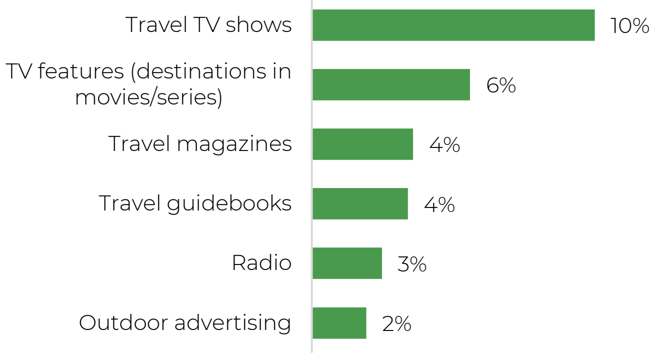
Referrals and recommendations



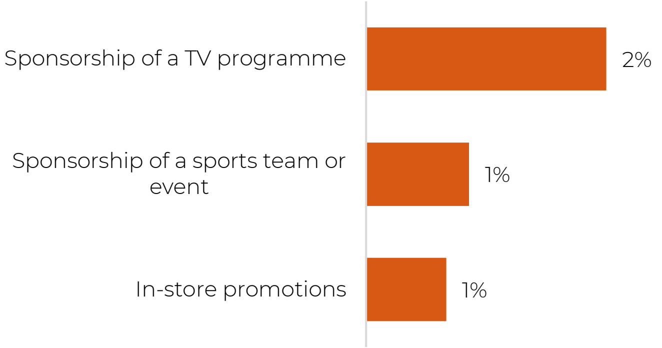
Media influencers



Traditional media



Experiential marketing

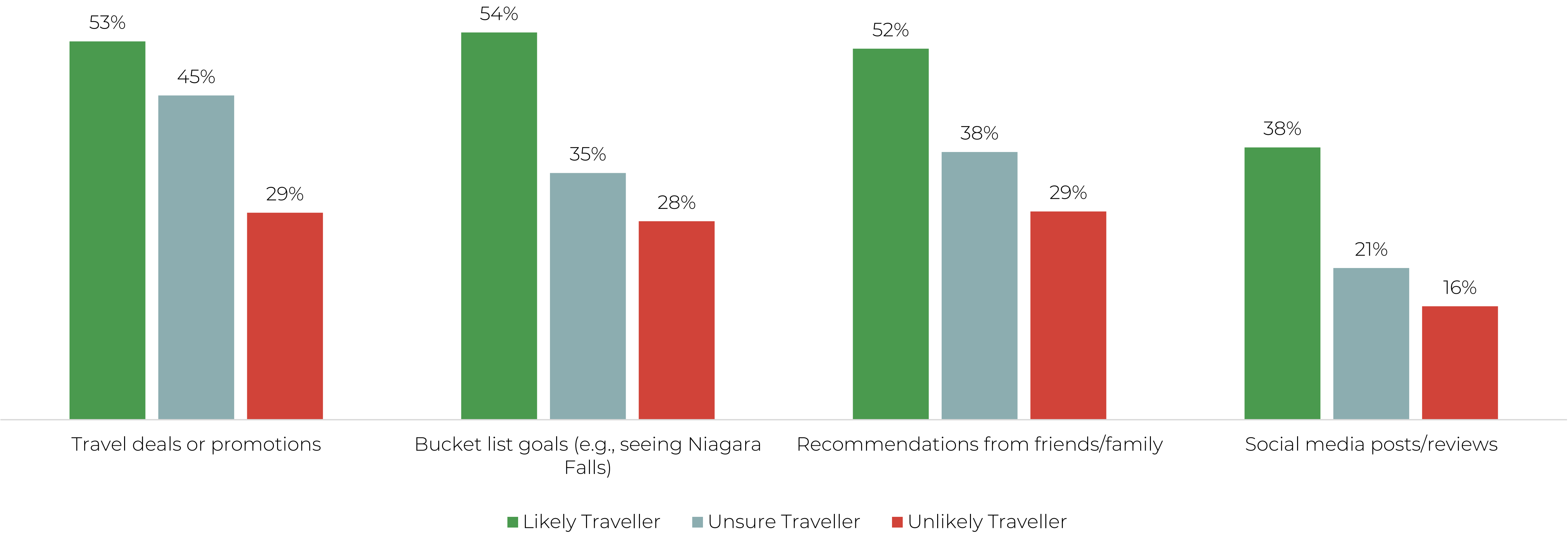


Which media channels influence your perception of Canada as a travel destination?

INFLUENCERS OF CANADIAN TRAVEL

Social media alone is however not enough of an influencer, with promotions, attractions, and word-of-mouth playing a significant role in influencing travel decisions.

Influencers of travel intentions (Top-2 Box Score)



How much do the following influence your decision to travel to Canada?

STRATEGIC RECOMMENDATIONS

Recommendation 1: Seasonality and Purpose

- It remains imperative for Canada to improve perceptions of being a Winter travel destination. US travellers indicate the majority of their travel will take place during Summer and Fall, with a very small percentage indicating Winter travel intention.
    - This is an ongoing strategic issue for the country, and requires coordinated regional effort to showcase Winter offerings while countering negative perceptions.
- Vacation travel is the dominant travel purpose by a significant margin, and messaging should be capitalizing on this.
- Top activity interests include sightseeing, culture, hiking, and culinary experiences. Matching these to key regions and developing strategic positioning along these can improve regional familiarity and consideration.
- Specific events tend to carry more weight with likely travellers who are probably already aware of these events. This could reinforce travel intent among likely travellers, but will likely not have much impact on unsure and unlikely travellers.

STRATEGIC RECOMMENDATIONS

Recommendation 2: Destination Familiarity

- Regional familiarity varies significantly, and most likely contributes to unsure and unlikely travellers not considering Canada as a potential destination.
- While awareness is a significant factor, this alone will not encourage travel. Especially for provinces with lower familiarity, combining awareness with communications that address barriers will be key:

Cost of travel

Cost of travel is a common barrier across regions. Communication of affordable travel options remains imperative.

Availability of packaged deals

Perceived availability of packaged deals in more rural regions like Yukon, Northwest Territories, and Nunavut is lacking and can be addressed through targeted communication.

Available activities

An understanding of the activities available in these regions is also required to encourage consideration.

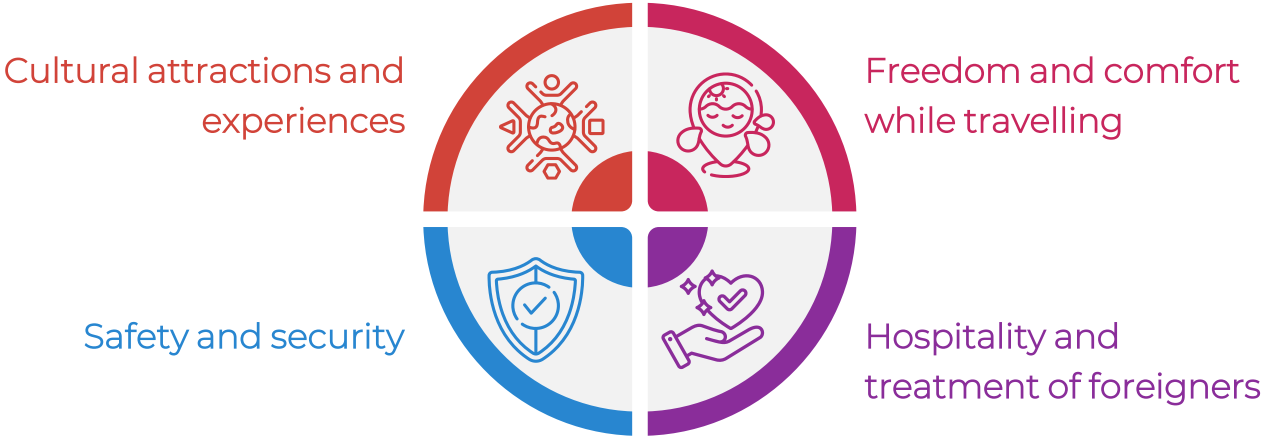
Transportation options

Availability of transportation options is seen to be lacking in regions like Prince Edward Island, Newfoundland and Labrador, and Nunavut.

STRATEGIC RECOMMENDATIONS

Recommendation 3: Leverage strengths and address barriers

- **Focus on strengths:** Overall, Canada is positioned well as a destination with important attributes performing well, and those that are performing below average being seen as less important. Ongoing positioning communication that highlights key strengths will serve to further entrench the destination's appeal:



- With cost of travel being an ever-present barrier, it is important to highlight things that offset this like exchange rate favourability and parity with travel costs to other destinations. Combining this with proximity and range of activities can improve consideration of Canada over other potential destinations.

STRATEGIC RECOMMENDATIONS

Recommendation 4: Digital First with Incentives

- **Digital video** (YouTube), **social media**, and **search** are the primary channels of influence for US travellers.
- A **digitally led communication strategy** with a focus on video content should therefore be the leading marketing approach, supported by enticing social media content.
- A combination of **organic and promoted content is recommended**, with promoted content focussing on top-of-the-funnel messaging (awareness, familiarity, high-level activity awareness, drivers of appeal) and organic content focussed more on improving destination knowledge (detailed destination attractions and sub-regional familiarity).
- It is important to indicate the **"reason to believe"** across these communications by supporting it with promotional offers, appealing to travel motivators (e.g. bucket list goals), or utilising testimonials to mimic word-of-mouth recommendations.

DEFINING THE FUTURE OF SUSTAINABLE TOURISM IN CANADA.

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