Report

Canada Travel Insights:
Summer Travel Plans

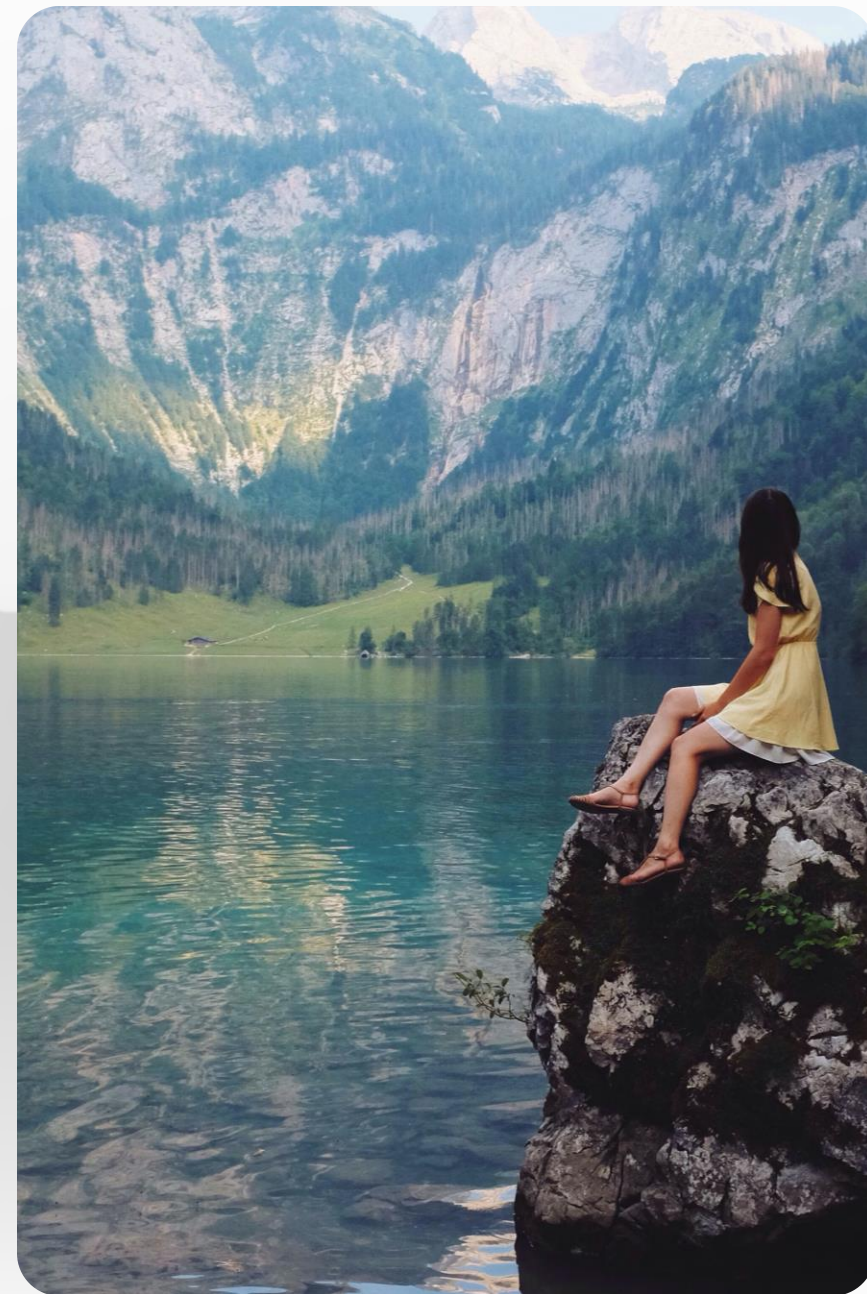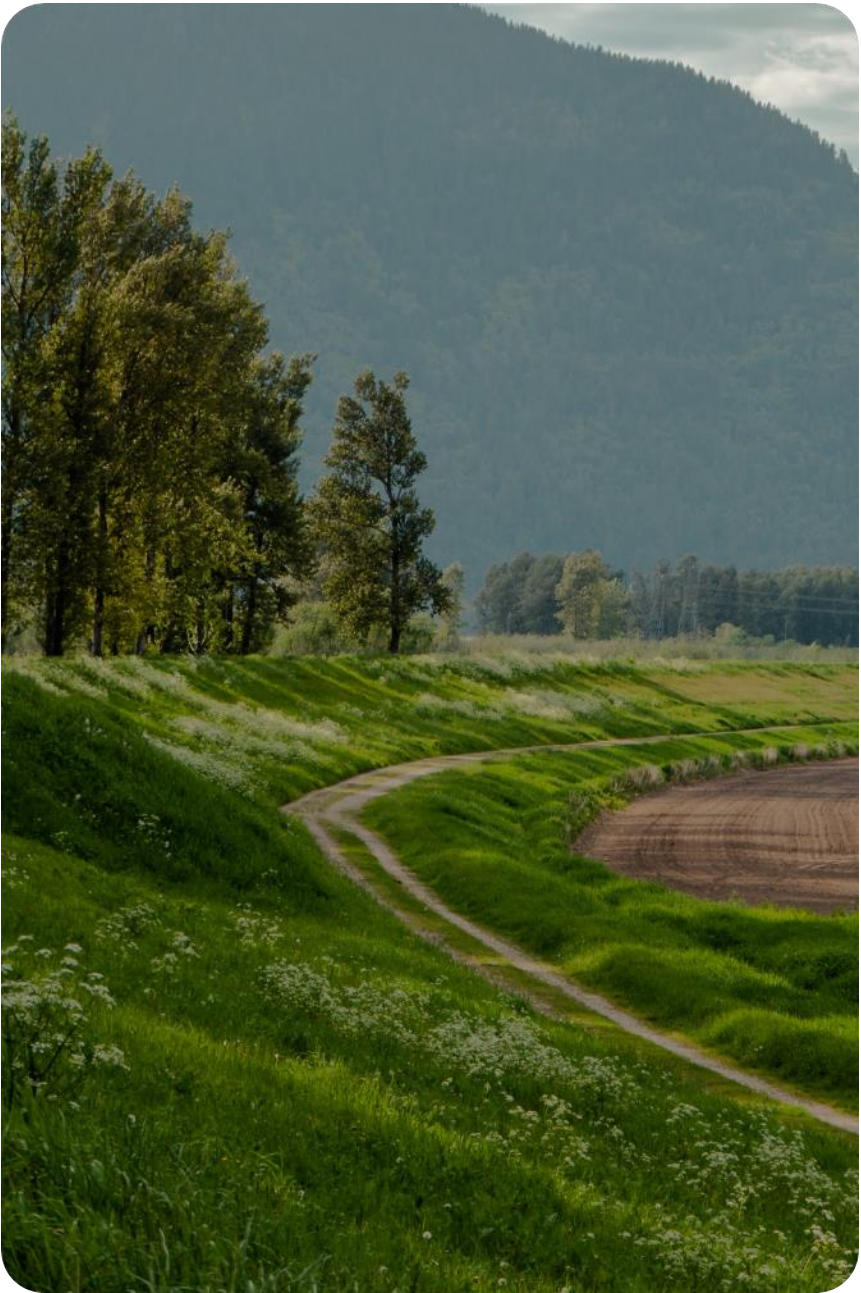May 2024

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Methodology

Methodology

Online survey with Canadian residents 18 years or older.
- Winter: 1,531 residents
- Spring: 1,527 residents
- Summer: 1,610 residents

Respondents were randomly recruited using LEO's online panel.

When

Winter: November 17-20, 2023

Spring : March 8-10, 2024

Summer: April 25-28, 2024

Margin of Error & Weighting

For comparison purposes, a probability sample of this size yields a margin of error no greater than ±2.50% for 1,531, 1,527 and 1,610 Canadian residents. Results were weighted according to age, gender, and region to ensure a representative sample of the Canadian population using data from Statistics Canada's latest census.

Questions

Have questions about this report?

Please contact Jane Ha-Trapp, Senior Vice-President at jhatrapp@leger360.com

Travel and Tourism Team at Leger

Inflation, natural disasters, artificial intelligence, and the COVID-19 pandemic have reshaped travel and tourism. Understanding and quickly adapting to the needs of the travel and tourism community is more important than ever.

Leger's Travel & Tourism team specializes in providing holistic qualitative and quantitative travel market research tailored to client's unique needs.

We help destination marketing organizations, airports, tourist attractions, and tourism associations navigate the changing landscape and make the best business decisions.

Travel & Tourism Report Series

Leger's Travel & Tourism Series will provide insights on key topics and trends within the travel and tourism sector that focus on Canadians' travel behaviours, perceptions, and preferences.
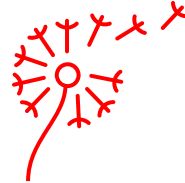
The **third edition** offers travel comparisons across winter, spring and summer seasons on the following topics. These behaviours and attitudes will continue to be tracked on a quarterly basis to examine trends over time.
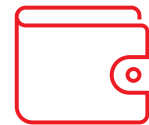
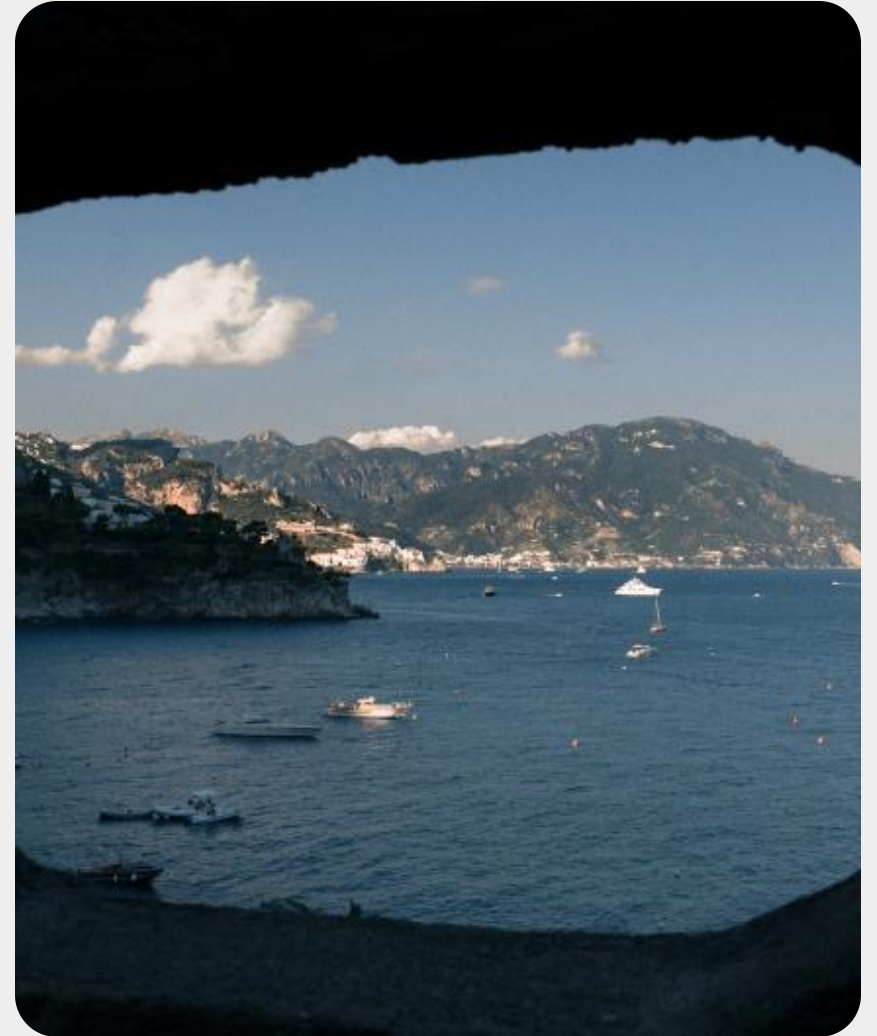| Canadians' travel plans in each season	Future Leisure Trip Types	Factors impacting travel plans	Impact of inflation on travel behaviour	Ideal vacation destination if money were no object

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Key Findings

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Key Findings

Canadians love to travel during the summer.
Similar to the spring, **almost half of Canadians** are likely to travel this summer.

48%
Total likely to travel

47%
Likely to travel for leisure

11%
Likely to travel for business
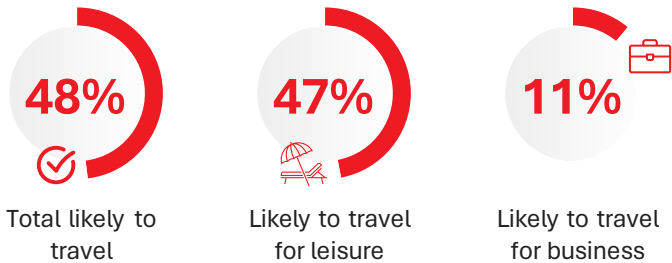
Canadian leisure travellers are more likely to plan to travel within Canada this summer.

69%
Plan to travel within Canada
(vs. 54% spring and 47% winter)

Trips to visit **friends and family** are **most popular.**

45% Visiting friends/family

29% Visiting city destination

19% Adventure travel

Inflation continues to impact travel plans, with the majority of travellers making compromises to cope with inflation.

FACTORS Impacting Travel Plans

Inflation/ current economic climate
66% Non-Travellers
64% Leisure Travellers

High transportation costs
64% Non-Travellers
65% Leisure Travellers

TYPE of Impact

78%
Are making compromises
(vs. 71% Spring and 74% in winter)

29% Reducing **shopping** expenses

28% Cutting back on **dining**

28% Choosing less expensive **accommodations**

26% Reducing **trip length**
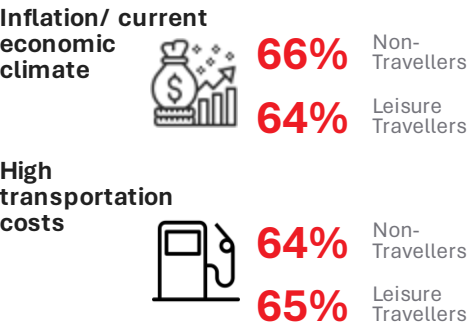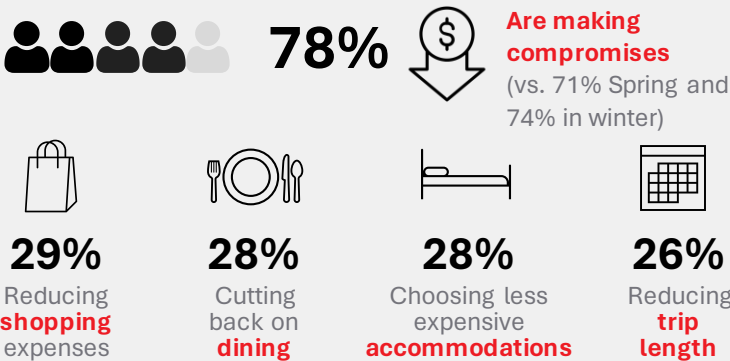
If money was not an issue, Canadian leisure travellers are most likely to choose European destinations as their dream summer destination.

35% Europe

30% Warm Weather destinations
(down from 35% spring, 43% winter)
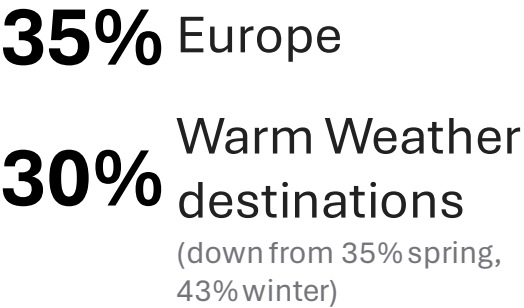
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Detailed Findings

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Summer Travel Behavior

Consistent with travel in the spring, almost half of Canadians are planning to travel this summer, with most planning leisure trips.
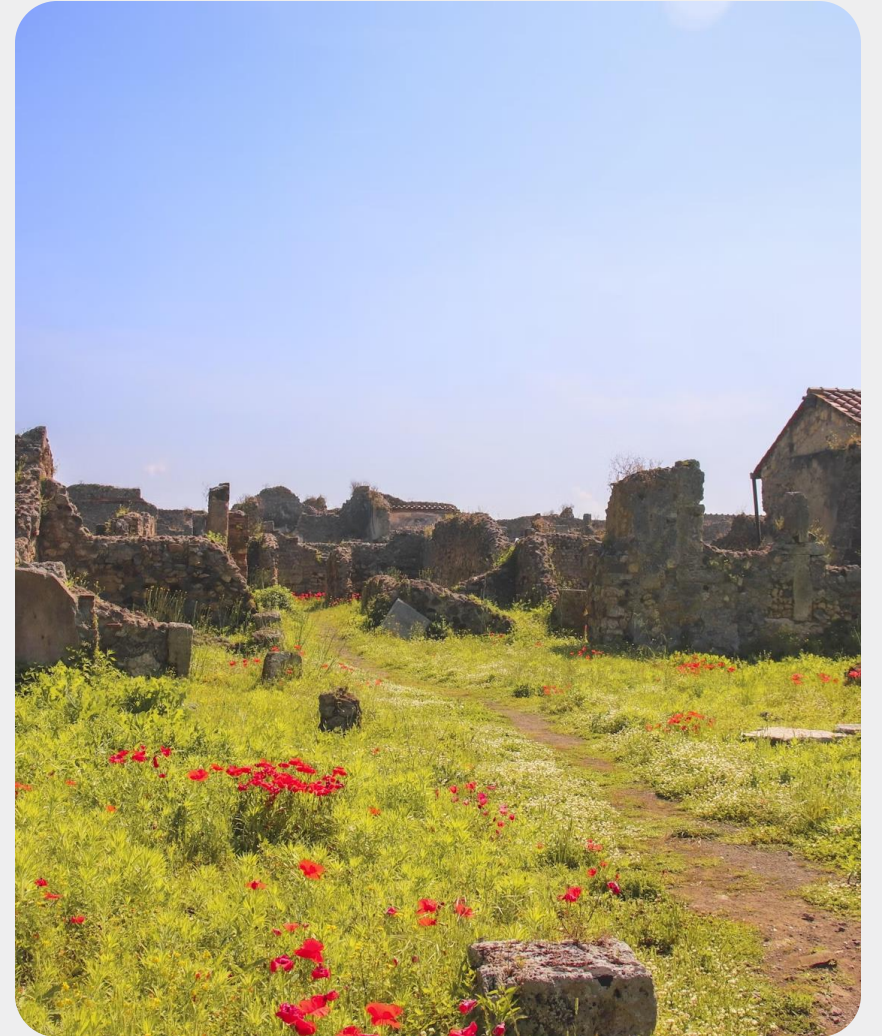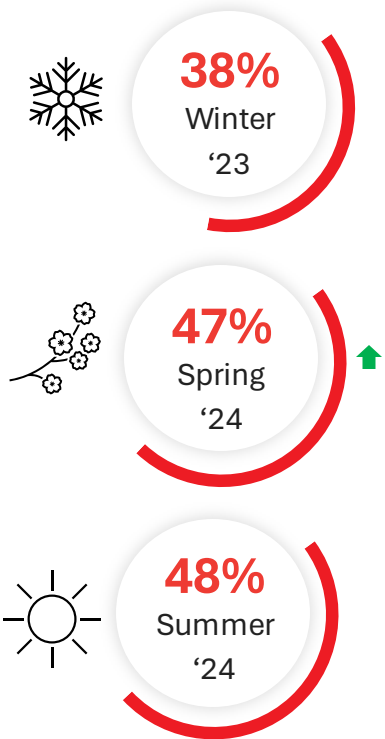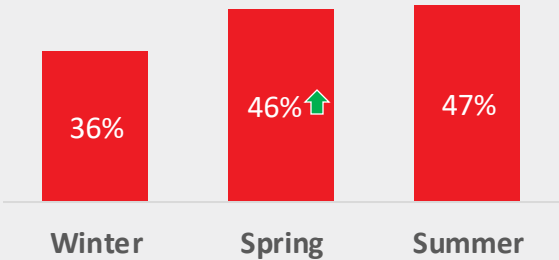
Likelihood to Travel

38% Winter '23

47% Spring '24

48% Summer '24

Likelihood to Take a Leisure Trip

	Winter	Spring	Summer
	36%	46% ⬆	47%

■ Leisure travellers

	Winter	Spring	Summer
Yes, already booked	13%	16%	14%
Yes, planning but not booked	13%	15%	16%
Somewhat likely to travel	11%	15% ⬆	16%
No	55%	46%	46%
Not sure	9%	8%	8%

Likelihood to take a Business Trip

	Winter	Spring	Summer
	11%	12%	11%
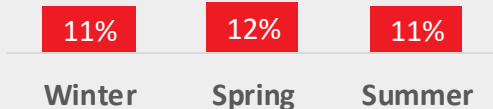
■ Business travellers

	Winter	Spring	Summer
Yes, already booked	3%	4%	2%
Yes, planning but not booked	4%	5%	5%
Somewhat likely to travel	4%	4%	4%
No	86%	84%	86%
Not sure	3%	3%	3%

Base: Canadian residents; Winter (n=1,531), Spring (n=1527), Summer (n=1610)
CTT1/UST1. Are you planning to take a business and / or leisure trip during the winter (November to February)/ spring (March to June 2024)/ summer (June to August)?

⬆ Statistically significantly higher than previous wave
⬇ Statistically significantly lower than previous wave

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Summer Travel Behaviour – By Demographics

Those aged 18 to 54, and those with children are more inclined to travel this summer compared to their counterparts. Manitoba/ Saskatchewan residents are significantly more likely to travel this summer than they were in the spring.

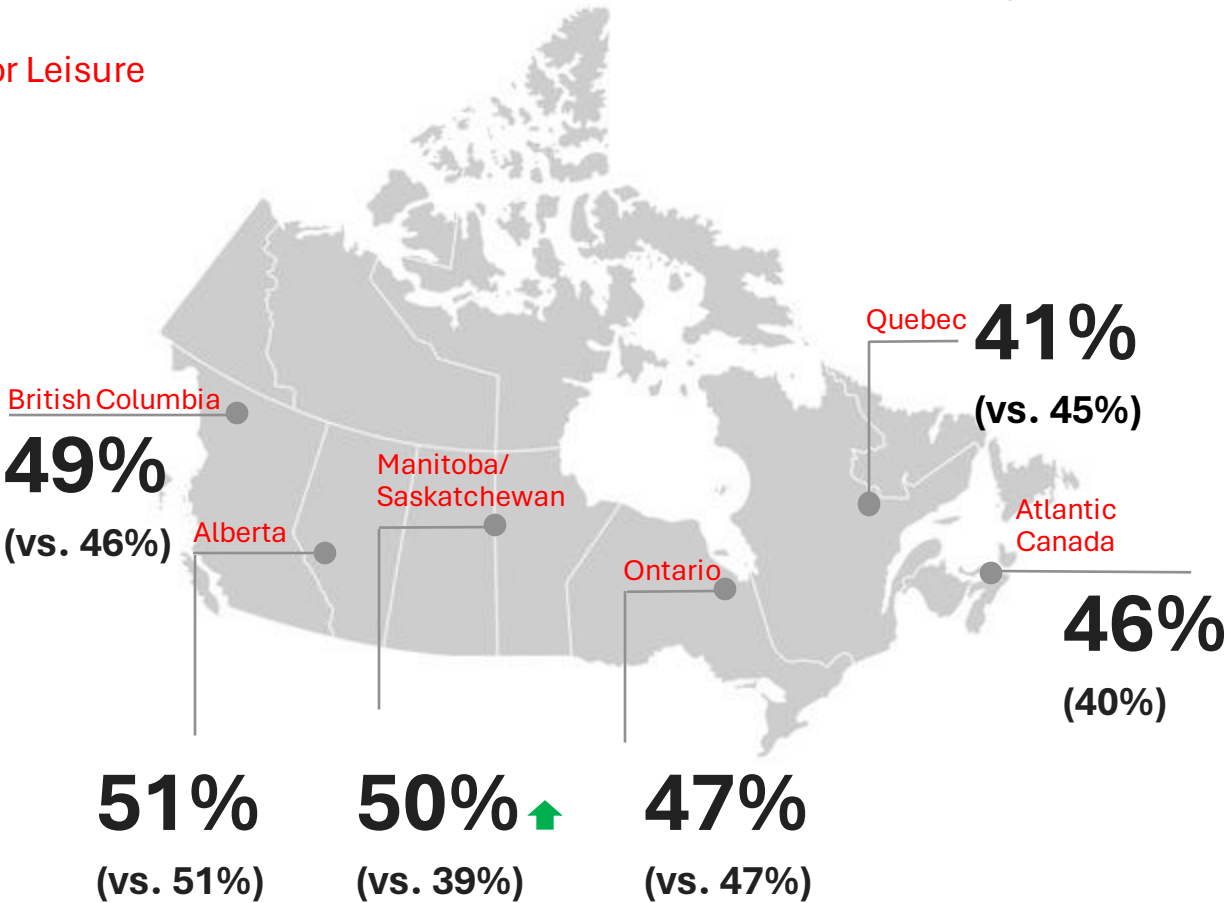**Likely to Travel for Leisure**

Quebec
41%
(vs. 45%)

British Columbia
49%
(vs. 46%)

Manitoba/ Saskatchewan

Alberta

Ontario

Atlantic Canada
46%
(40%)

51%
(vs. 51%)

50% ⬆
(vs. 39%)

47%
(vs. 47%)

Gender	Male (780)	Female (830)
Summer	50%	43%

Age	18-34 (412)	34-54 (531)	55+ (667)
Summer	52%	52%	39%

Kids	With Kids (411)	Without Kids (1,195)
Summer	54%	44%

Significantly **higher** than comparison group(s)
Significantly **lower** than comparison group(s)

⬆ Statistically significantly **higher** than previous wave
⬇ Statistically significantly **lower** than previous wave

Summer Leisure Travel Destinations

With the improvement in weather across Canada, an increasing number of Canadians are choosing to explore within their own country.
Close to 7-in-10 Canadians are opting for domestic travel, which represents a significant increase from the spring.

	Winter'23	Spring'24	Summer'24
Within my home province	22%	30% ⬆	42% ⬆
Within Canada – outside of my province	30%	29%	39% ⬆
To the United States	30%	21% ⬇	23%
To Mexico *	n/a	n/a	5%
Outside Canada / United States/ Mexico *	38%	26% ⬇	17% ⬇
Not sure	2%	8% ⬆	3% ⬇

69% ⬆
(compared to 54% in the spring) of Canadians are planning to travel **within Canada**

38%
(compared to 44% in the spring) of Canadians are planning to travel **outside Canada**

⬆ Statistically significantly <u>higher</u> than previous wave
⬇ Statistically significantly <u>lower</u> than previous wave

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Summer Travel Destinations

Canadians opting for domestic travel primarily favour provinces such as Ontario, British Columbia, and Quebec. Within the United States, the Northeast and Southeast regions are the most popular travel destinations. Internationally, Europe is at the top of the list, followed by Asia in a distant second.

Provinces Within Canada

Ontario	**35%**
British Columbia	**29%**
Quebec	**28%**
Atlantic	**24%**
Alberta	**23%**
Saskatchewan	**9%**
Manitoba	**9%**

Regions Within US

Northeast	**37%**
Southeast	**31%**
West	**24%**
Midwest	**21%**
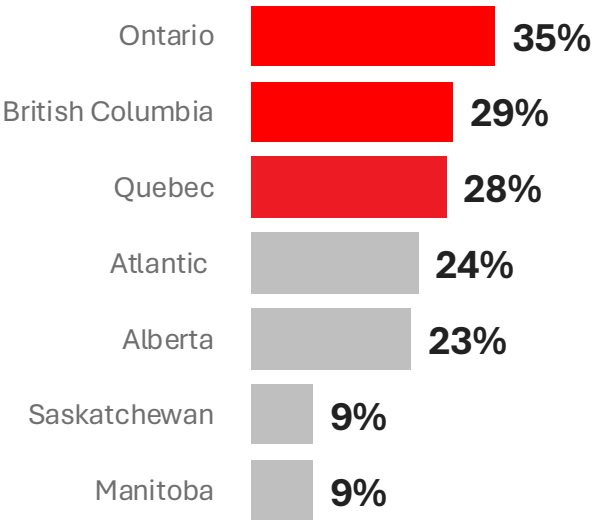
Outside of US, Mexico, Canada

Europe	**59%**
Asia	**18%**
Carribbean Island	**12%**
South America	**12%**
Africa	**5%**
Australia	**4%**
Antarctica	**0%**
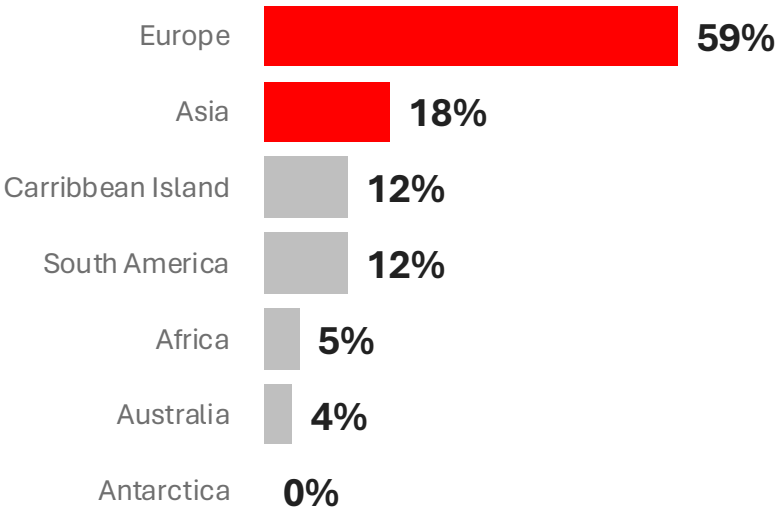
Base: Canadian residents who are planning to travel within Canada – outside my province/ within USA – outside my state/ Outside of USA, Canada, Mexico
UST2AA: Which province(s), region(s) within Canada are you planning on visiting this summer? (n=312)
UST2A. Which region(s) within the United States are you planning on visiting this summer? (n=197)
UST2B. Where outside the US, Canada and Mexico are you planning on visiting this summer? (n=152)

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Type of Vacations This Summer

Consistent with spring travel plans, visiting family and friends remains the predominant type of trip planned this summer. Trips to tropical/warm weather destinations continues its downward trend since the peak in Winter '23.

	Summer'24	Spring'24	Winter'23
Visiting friends / family	45%	39%	35%
Visit to a city destination	29%	25%	22%
Adventure travel	19%	16%	12%
Visit to a national park *	16%	n/a	n/a
Visit to a historic site *	14%	n/a	n/a
Attending music / art festival / concert	12%	8%	6%
Attending amusement/ theme park *	11%	n/a	n/a
Visit to a tropical/ warm weather resort/ hotel *	11% ⬇	24% ⬇	38%
Attending a live sporting event	9%	8%	7%
Wine/ beer/ liquor tasting	8%	6%	n/a
Cruise vacation	6%	7%	10%
Wellness retreat	5%	4%	4%
Visit to a moutain resort	5%	5%	8%

Base: Among leisure travellers who are planning to travel; Winter (n=598), Spring (n=747), Summer (n=785)
CTT3/ UST3. What type of trip are you planning to take?
Note: * represents new attributes included/ wording changes in the summer wave

⬆ Statistically significantly higher than previous wave
⬇ Statistically significantly lower than previous wave

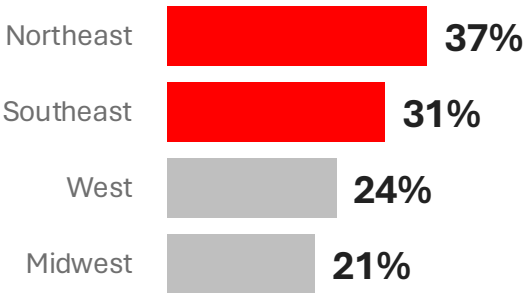# Type of Vacation This Summer – By Demographics

Those travelling within Canada are more inclined to visit friends and family. Meanwhile, adventure travel is predominantly favoured by younger travellers (18-54) and those travelling within Canada.

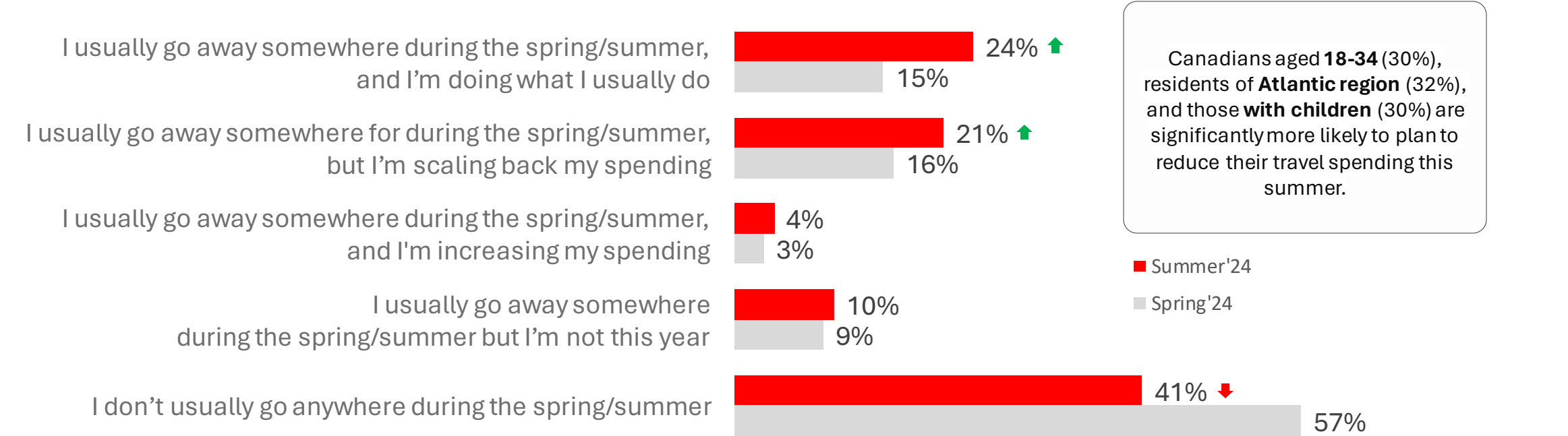| Type of Travel	Total	18-34	35-54	55+	Travelling Within Canada	Travelling Outside Canada
n=	785	225	284	276	533	345
Visiting friends / family	45%	39%	45%	50%	50%	37%
Visit to a city destination	29%	29%	31%	27%	29%	33%
Adventure travel	19%	20%	25%	11%	22%	13%
Visit to a national park *	16%	18%	16%	14%	19%	11%
Visit to a historical site *	14%	11%	16%	15%	15%	15%
Attending music/ art festival/ concert	12%	14%	11%	12%	12%	13%
Attending amusement/ theme park *	11%	11%	15%	6%	11%	13%
Visit to a tropical, warm weather resort/ hotel *	11%	13%	12%	8%	7%	19%
Attending a live sporting event	9%	12%	8%	8%	9%	11%
Wine/ beer/ liquor tasting	8%	7%	11%	7%	9%	8%
Cruise vacation	6%	8%	5%	6%	5%	9%

Base: Canadian residents who are planning to travel for leisure purposes this Spring (n=747), Summer (n=785)
CTT3/ UST3. What type of trip are you planning to take?
Note: * represents new attributes included/ wording changes in the summer wave

Significantly higher than comparison group(s)
Significantly lower than comparison group(s)

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Typical Summer Travel Behaviour

Almost 1-in-4 Canadian residents usually go somewhere during the summer and are doing what they usually do, while a significantly higher proportion of Canadians (21%, up 5 percentage points) usually go away during summer but have decided to scale back their spending.

I usually go away somewhere during the spring/summer, and I'm doing what I usually do — 24% ⬆ / 15%

I usually go away somewhere for during the spring/summer, but I'm scaling back my spending — 21% ⬆ / 16%

I usually go away somewhere during the spring/summer, and I'm increasing my spending — 4% / 3%

I usually go away somewhere during the spring/summer but I'm not this year — 10% / 9%

I don't usually go anywhere during the spring/summer — 41% ⬇ / 57%

Canadians aged **18-34** (30%), residents of **Atlantic region** (32%), and those **with children** (30%) are significantly more likely to plan to reduce their travel spending this summer.

🟥 Summer'24
⬜ Spring'24

Base: Canadian residents: Spring (n=1,527), Summer (n=1,610)
CTT6/ UST1B. Which of the following best describes your plans during the Spring (March to June 2024)/ Summer (June to August 2024)?

⬆ Statistically significantly higher than previous wave
⬇ Statistically significantly lower than previous wave

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Factors Impacting Travel Plans

The current economic climate and high transportation costs continue to be top factors impacting travel plans this summer. Worldwide political stability has had significantly less impact on leisure travellers compared to spring and winter.
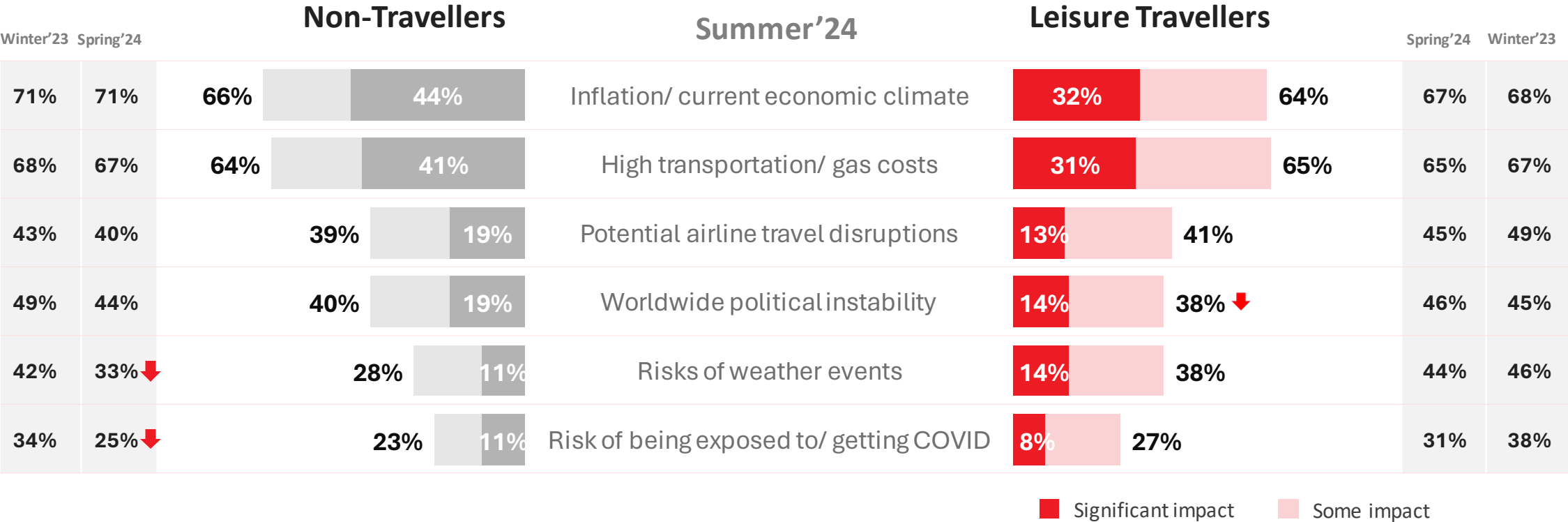
		Non-Travellers	Summer'24	Leisure Travellers		
Winter'23	**Spring'24**				**Spring'24**	**Winter'23**
71%	**71%**	**66%** / **44%**	Inflation/ current economic climate	**32%** 64%	**67%**	**68%**
68%	**67%**	**64%** / **41%**	High transportation/ gas costs	**31%** 65%	**65%**	**67%**
43%	**40%**	**39%** / **19%**	Potential airline travel disruptions	**13%** 41%	**45%**	**49%**
49%	**44%**	**40%** / **19%**	Worldwide political instability	**14%** 38% ⬇	**46%**	**45%**
42%	**33%** ⬇	**28%** / **11%**	Risks of weather events	**14%** 38%	**44%**	**46%**
34%	**25%** ⬇	**23%** / **11%**	Risk of being exposed to/ getting COVID	**8%** 27%	**31%**	**38%**

■ Significant impact　　■ Some impact

⬆ Statistically significantly higher than previous wave
⬇ Statistically significantly lower than previous wave

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How Summer Travel Plans Have Been Impacted by Inflation

While more people are travelling in the summer, the overall impact of inflation on travel plans has risen significantly since the spring, with close to 4-in-5 leisure travellers making compromises. Nearly 3-in-10 are spending less on shopping and dining and choosing less expensive accommodation options. Compared to the spring, travellers are more likely to take shorter trips (26%, up 8 percentage points) and choose destinations closer to home (24%, up 6 percentage points).

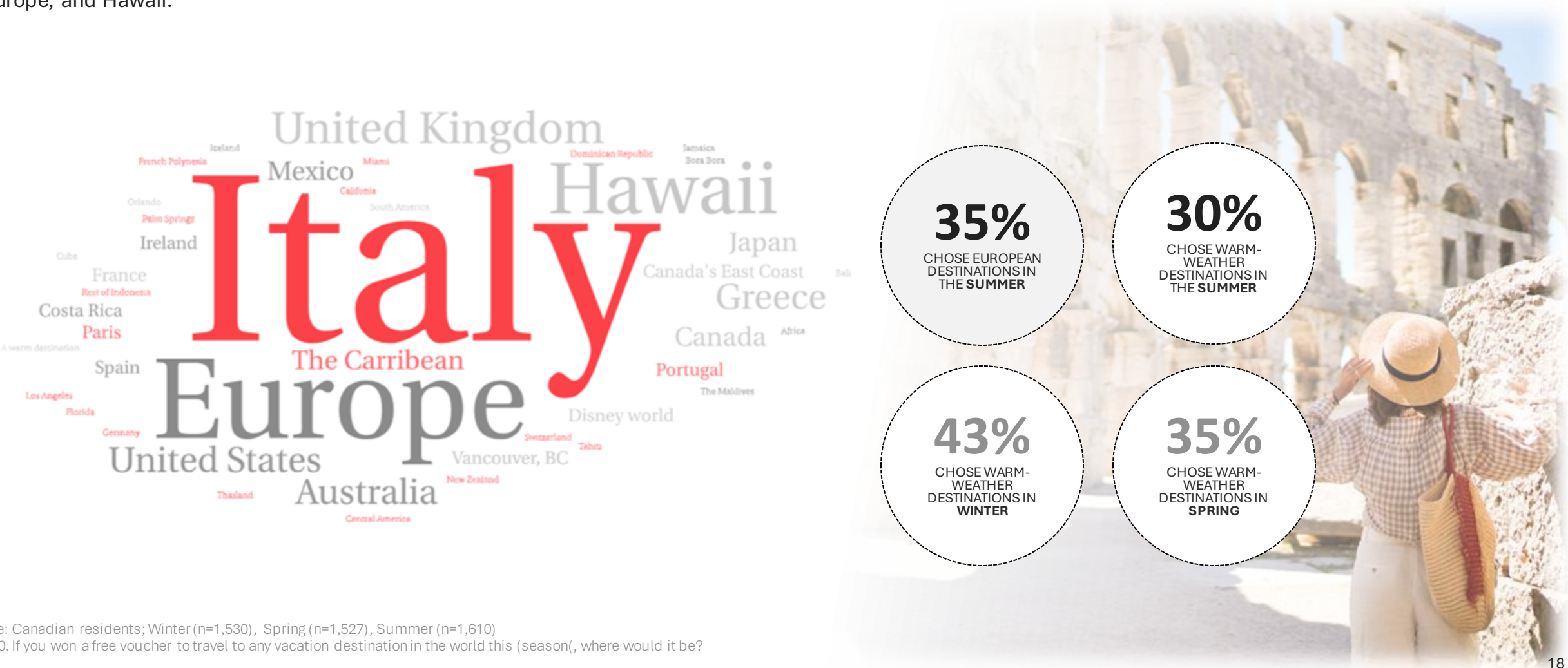|	Summer'24	Spring'24	Winter'23
TOTAL IMPACT	78% ⬆	71%	74%
Reduce spending on shopping	29%	26%	31%
Cut back on dining out	28%	26%	26%
Choose less expensive accommodation options	28%	25%	28%
Reduce length of trip	26% ⬆	18%	20%
Choose destinations closer to home	24% ⬆	18%	13%
Reduce spending on activities and attractions	24%	24%	26%
Stay with friends and family	22%	19%	19%
Use rewards or credit card points *	16%	n/a	n/a
Choose alternative transportation methods	16%	12%	12%
My travel plans have not been impacted	22% ⬇	29%	26%

Base: Canadian residents who are planning to travel for leisure purposes this Winter/ Spring/ Summer; Winter (n=598), Spring (n=747), Summer (n=785)
CTT5/ UST5. How have your travel plans been impacted for the upcoming winter/ spring/ summer season?
Note: * represents new attributes included/wording changes in the summer wave

⬆ Statistically significantly higher than previous wave
⬇ Statistically significantly lower than previous wave

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Ideal Summer Travel Destination if Given Free Voucher

Warm-weather destinations are no longer the preferred choice for travellers. Instead, European destinations have become the dream location for more than one-third of travellers this summer. If given a free voucher for travel to any vacation destination this summer, Canadians would prefer to visit Italy, other parts of Europe, and Hawaii.

35%
CHOSE EUROPEAN DESTINATIONS IN THE **SUMMER**

30%
CHOSE WARM-WEATHER DESTINATIONS IN THE **SUMMER**

43%
CHOSE WARM-WEATHER DESTINATIONS IN **WINTER**

35%
CHOSE WARM-WEATHER DESTINATIONS IN **SPRING**

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Summer Travel Trends – Canada vs. US

TRAVEL PURPOSE	🇨🇦	🇺🇸
Likelihood to travel	48%	52%
Likelihood to take a leisure trip	47%	51%
Likelihood to take a business trip	11%	19%
Leisure travel within home country	69%	91%
Leisure travel outside of home country	42%	26%

BUDGET FOR LEISURE TRIPS

<$1,000	19%	24%
$1,000-$2,499	29%	22%
$2,500-$4,999	20%	19%
$5,000+	26%	29%

TYPE OF LEISURE TRAVEL PLANNED

🇨🇦	45%	29%	19%	16%	14%
🇺🇸	52%	30%	19%	19%	19%
	Visiting friends and family	Visit to a city destination	Adventure travel	Visit to a national park	Visit to historic site, music/ art event

# OF LEISURE TRIPS	🇨🇦	🇺🇸
1	49%	44%
2	26%	27%
2	9%	15%
3	5%	4%
4	5%	3%
5+	6%	7%

FACTORS IMPACTING LEISURE TRAVEL
(% significant impact/ some impact)

	🇨🇦	🇺🇸
High transportation/ gas costs	65%	62%
Inflation/ current economic climate	64%	61%
Potential airline travel disruptions	41%	39%
Worldwide political instability	38%	39%
Risks of weather events	38%	41%
Risk of being exposed to/ getting COVID	27%	32%

Base: Base size (n) varies, US Survey (n=1008), Canada Survey (n=1610)

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Respondent Profile
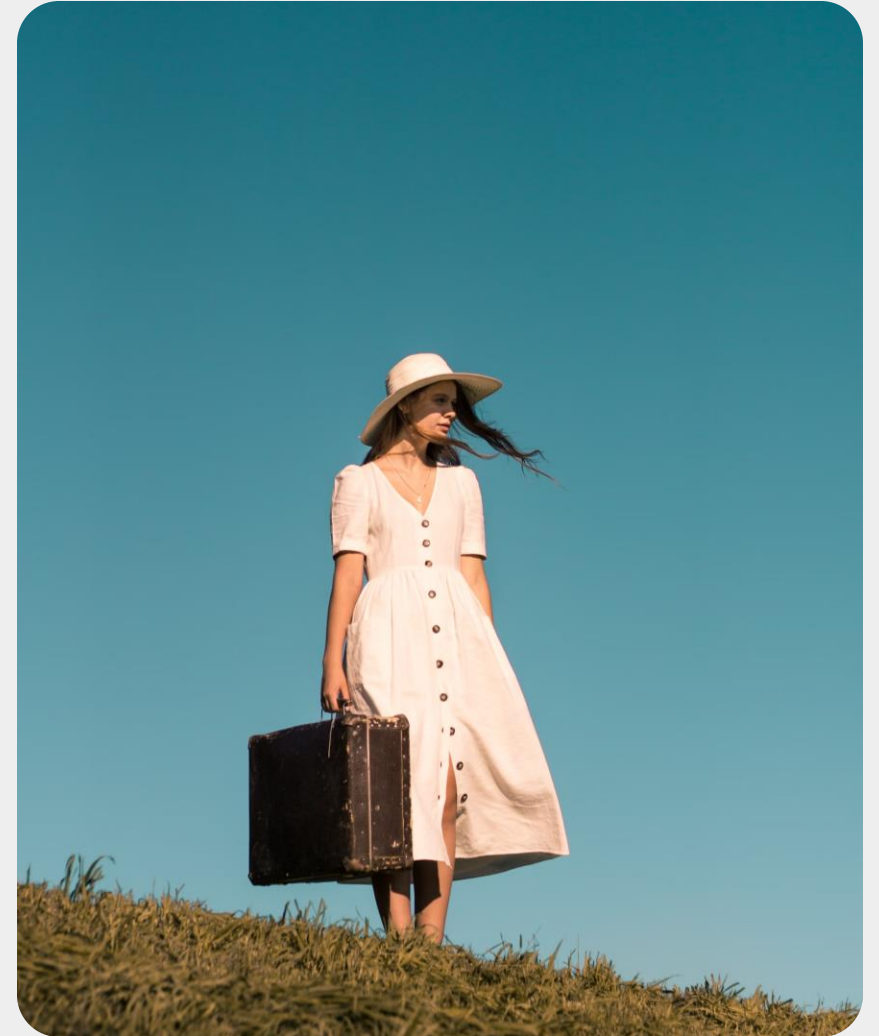
Weighted and Unweighted Sample

The tables below present the distribution of respondents on key variables before and after weighting.

	Summer	
	Weighted	Unweighted
Region	**1,610**	**1,610**
British Columbia	224	163
Alberta	179	140
Saskatchewan/Manitoba	104	130
Ontario	623	642
Quebec	372	430
Atlantic	108	105
Area		
Urban	672	685
Suburban	616	606
Rural	310	309

	Summer	
	Weighted	Unweighted
Gender		
Male	785	780
Female	825	830
Age		
18-34	429	412
35-54	518	531
55+	662	667

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Contact Us

For more information on this study, please contact our experts:

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consultants

8
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