



REPORT

Canadian Winter Travel Plans 2023/24

DATE December 2023

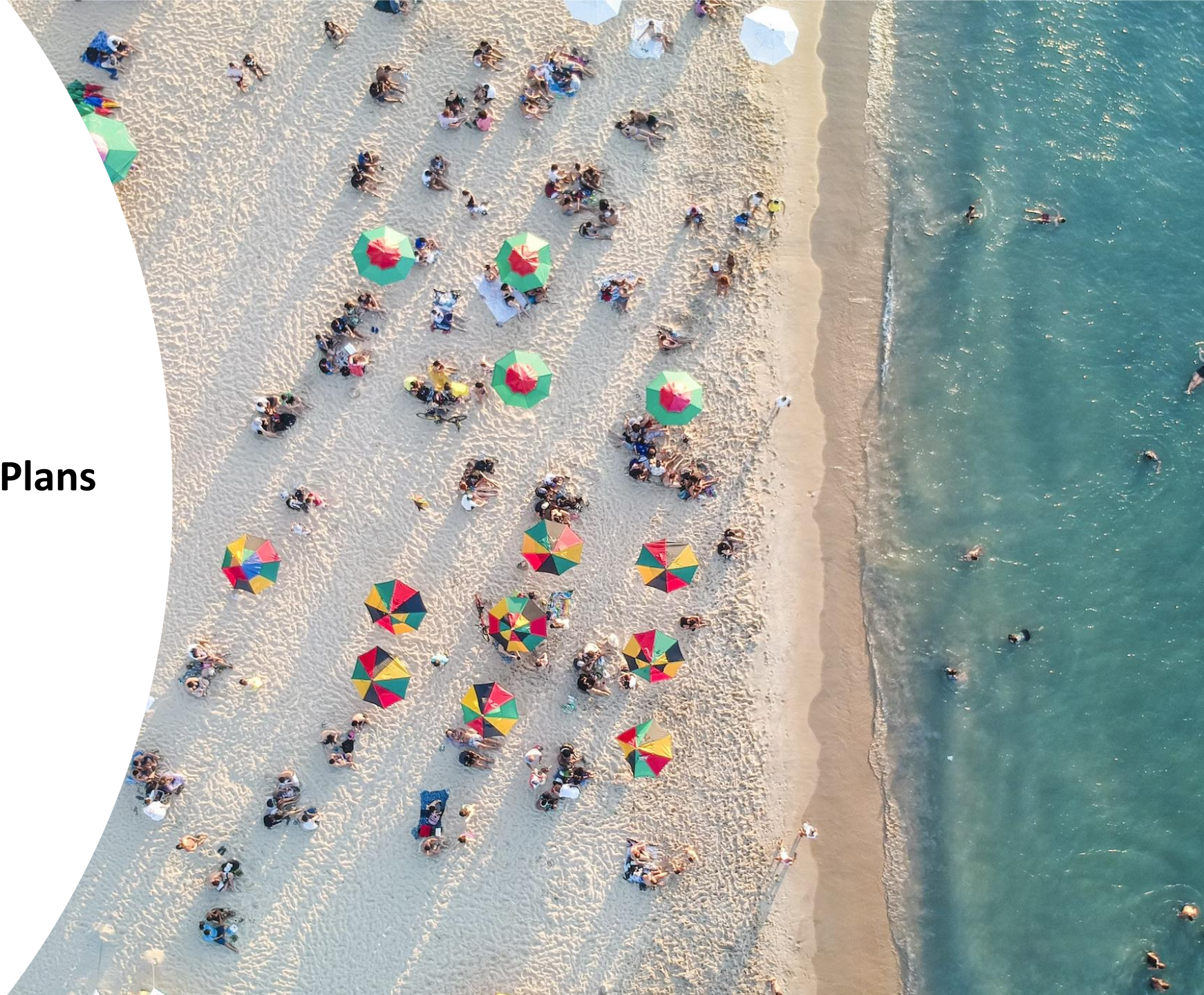




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Methodology



Method

Two online surveys with 1,531 and 1,530 Canadian residents aged 18+ who were randomly selected from Leger's Leo Panel



When

Data collection:

- November 17-20, 2023
- December 8-11, 2023



Margin of error

For comparison purposes, a probability sample of this size yields a margin of error no greater than $\pm 2.50\%$ for the total sample size of 1,531/1,530 Canadian residents



Weighting

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 available census

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.

This first edition provides insights on:



Canadians' winter travel plans



Factors impacting winter travel plans



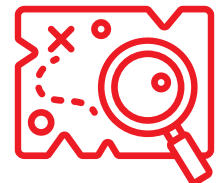
Impact of inflation on travel behaviour



Ideal vacation destination if money were no object



Main reasons for choosing destinations travelled to in past 2 years

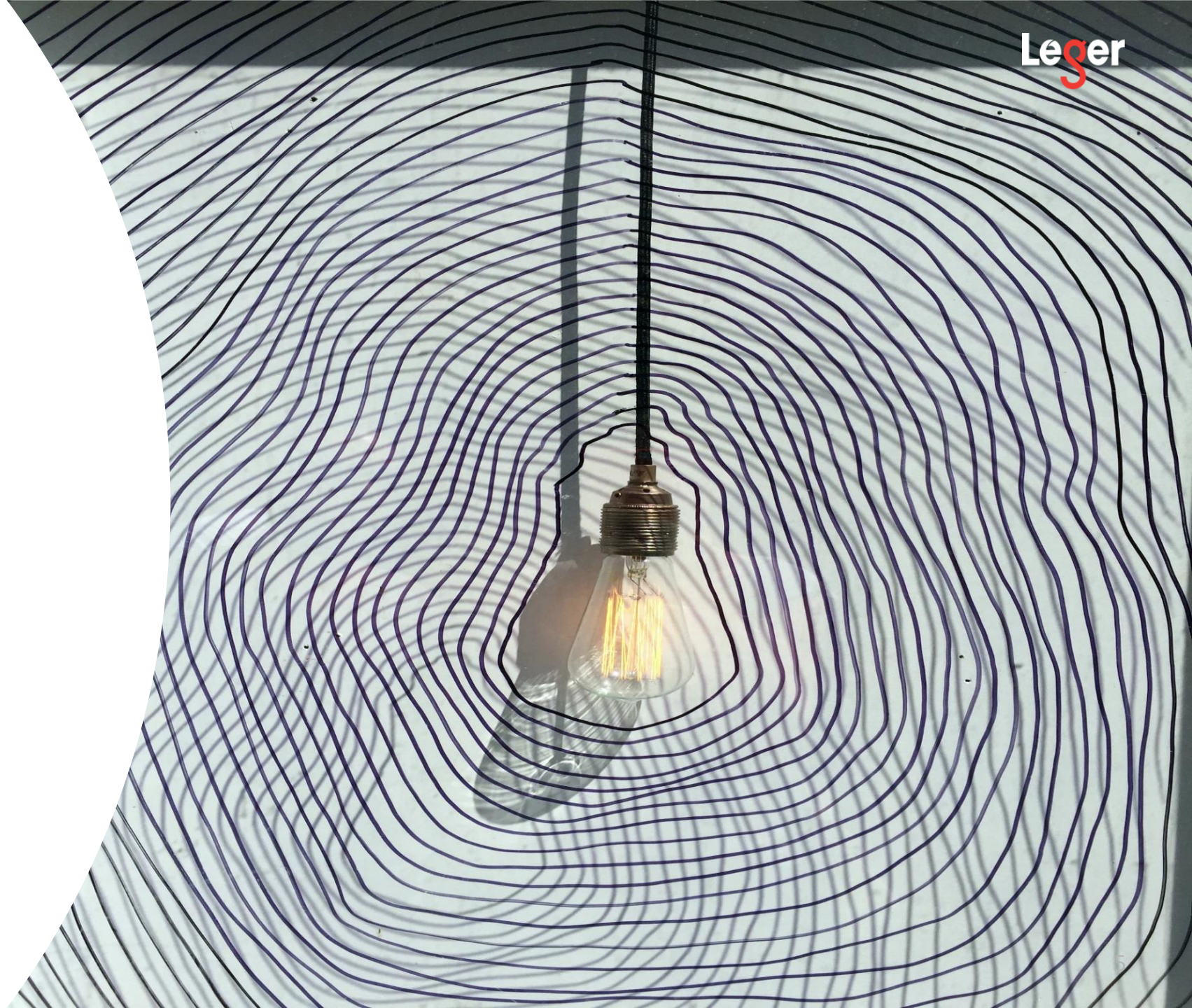


Type of future leisure travel

These behaviours and attitudes will be tracked on a quarterly basis to examine trends over time.

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Key Insights



Key Insights



Canadians Love Their Winter Travel: Close to 2-in-5 Canadians are likely to travel this winter, with more than one-third (36%) planning to travel for leisure and 1-in-10 (11%) planning to travel for business purposes.



Warm Weather Destinations and Visiting Friends are Popular: The top two reasons for travelling this winter are to escape to warm weather destinations (38%) and visit friends and family (35%), with plans to travel outside Canada being more prevalent (62%) than travelling within the country (47%).



Inflation is Having a Dramatic Impact on Travel Plans: Among the various factors that could potentially impact travel plans, inflation is having the greatest impact on both those who plan to travel for leisure (68%) this winter and those who do not (71%).



A Significant Number of Travellers are Making Different Spending Choices to Deal with Inflation: Three-quarters (74%) of leisure travellers are making travel compromises, such as reducing shopping spend (31%), choosing less expensive accommodations (28%), cutting back on dining out (26%) and spending less on activities/attractions (26%).



Key Insights *Continued*



Warm-Weather Destinations Top Traveller's Wish Lists: If given a free voucher to travel to any vacation destination in the world this winter, more than 2-in-5 Canadians would choose to escape to somewhere warm, with Hawaii topping the list.



Canadians Enjoy Spending Vacations with Family & Friends: Visiting friends and family is the top reason why Canadian leisure travellers chose to visit a specific travel destination in the past two years (58%), followed by exploring nature (40%), visiting popular tourist attractions (37%), and shopping (37%).



Food, Music & Entertainment are Travel Trends to Keep an Eye On: Interestingly, 3-in-10 chose a specific destination to experience the local food scene, while roughly 1-in-5 have visited a specific location to attend a music concert or to visit a region featured in a TV show/movie.

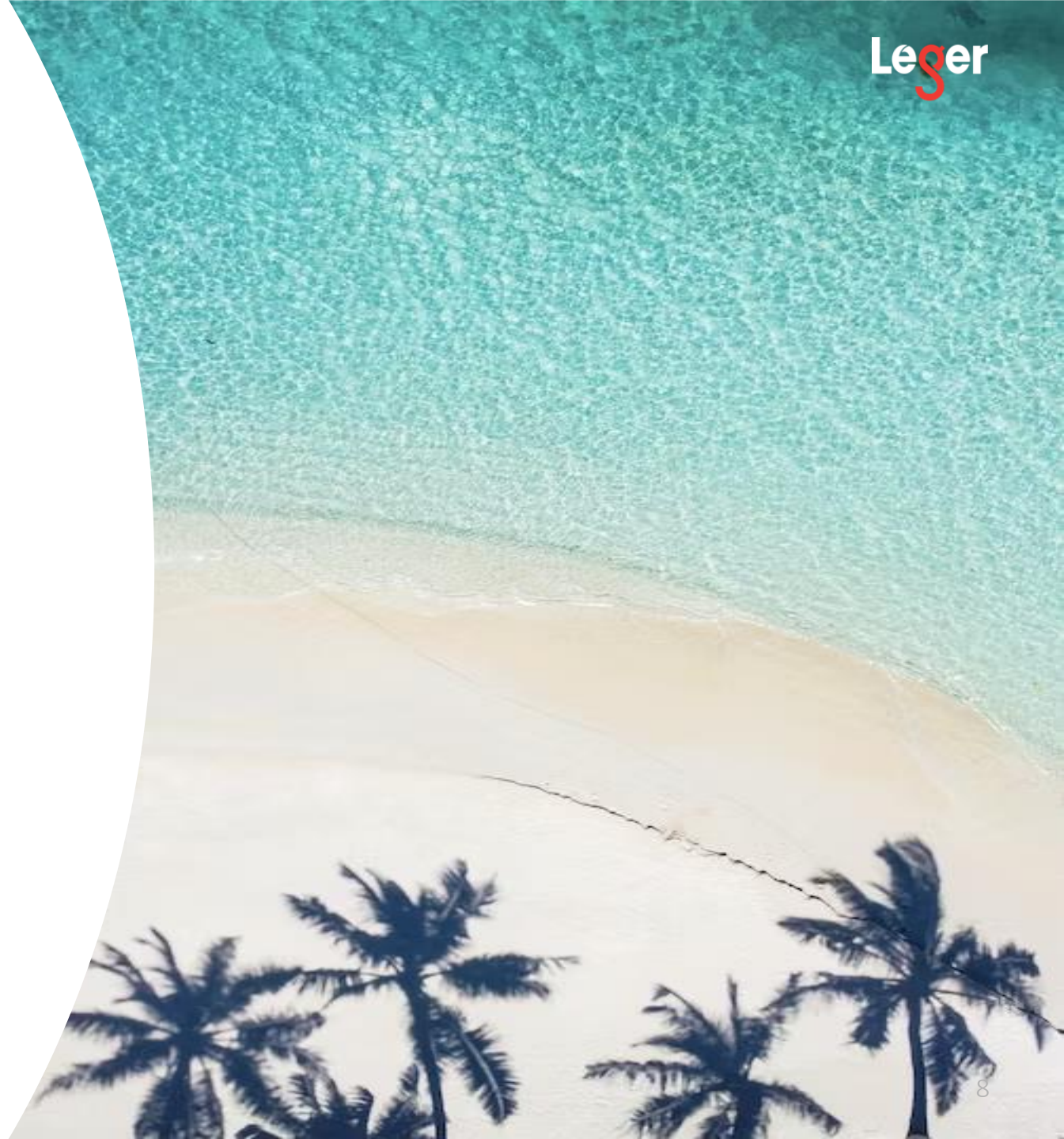


Travel Motivations Differ By Destination: Trips within Canada were mainly chosen to visit family and friends, followed by exploring nature. For US destinations, the top motivations are visiting popular tourist attractions, shopping, and visiting friends/family. For international travel, it's to visit popular tourist attractions, immerse in the local culture, and experience the local food scene.



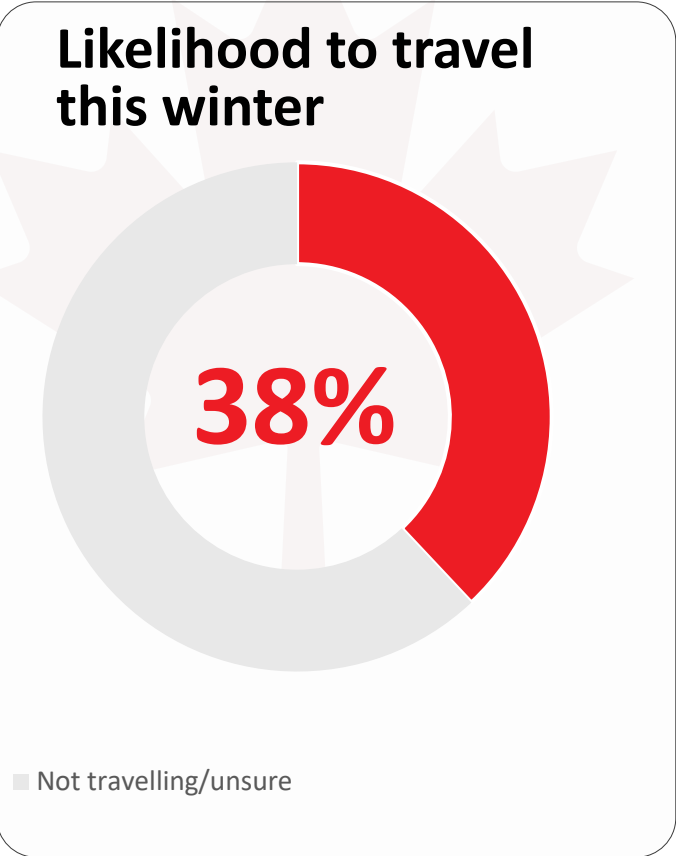
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Detailed Results

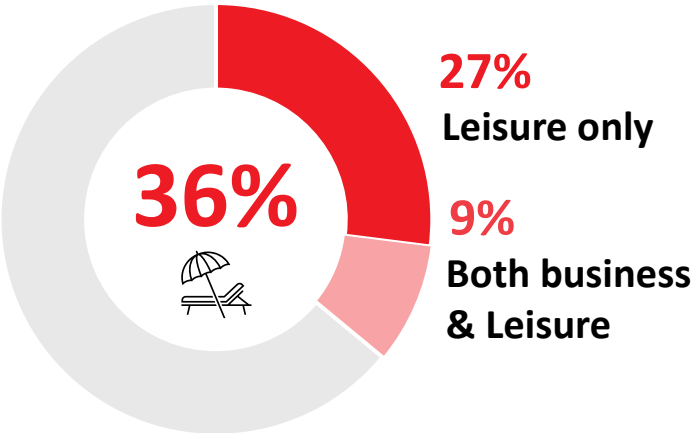


Canadian Winter Travel Behaviour

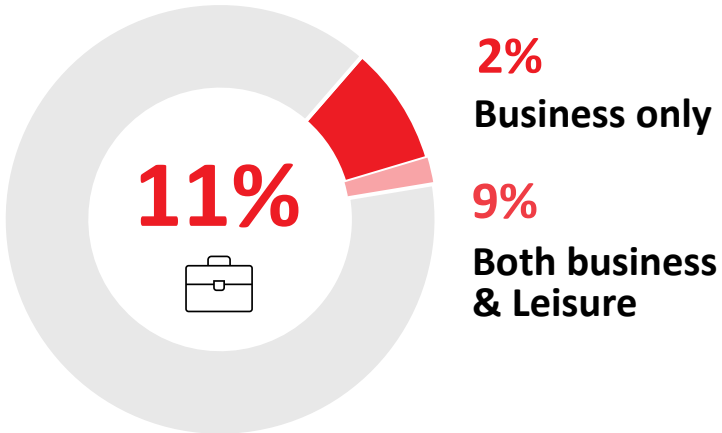
Just over a third of Canadians are planning to travel this winter, with leisure travel dominating business travel. Only 1-in-10 have finalized plans, while the rest are in various stages of planning.



Leisure Travellers



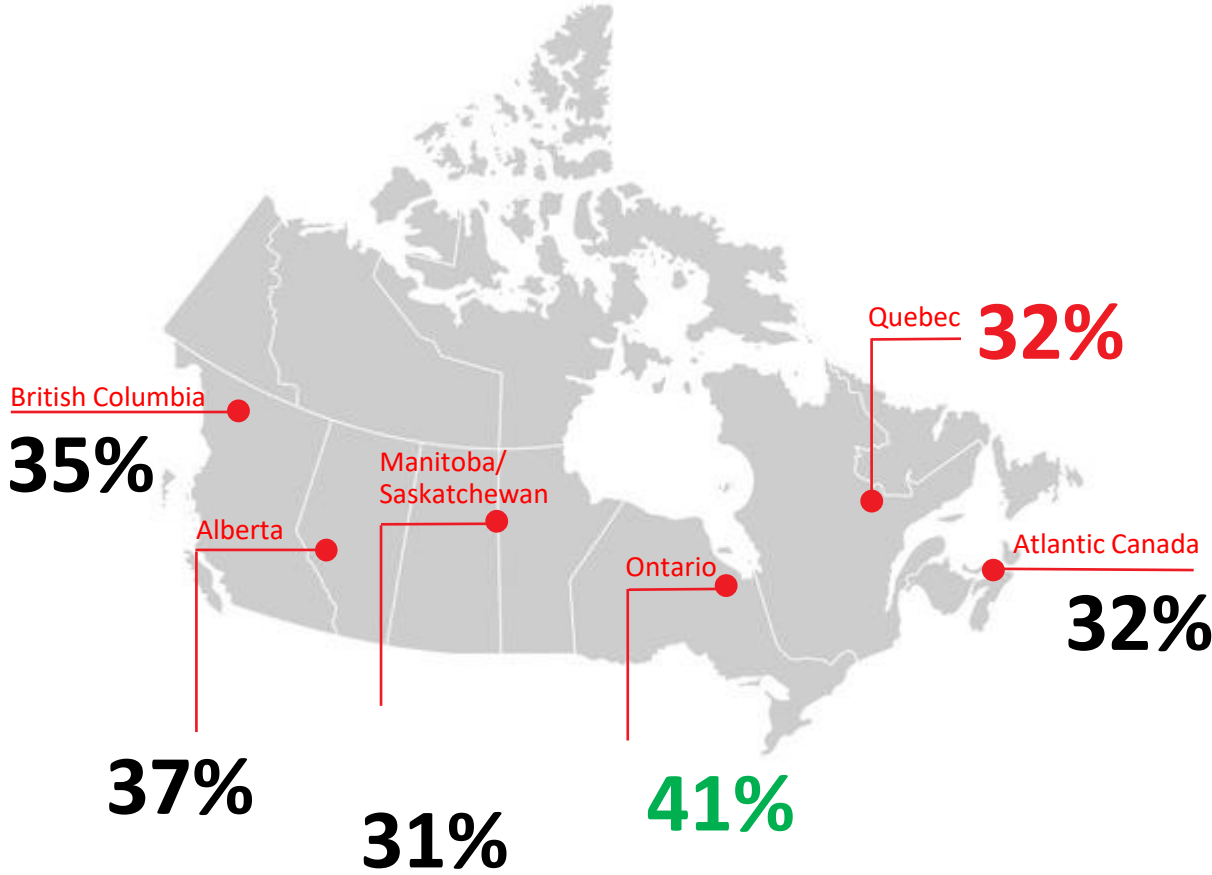
Business Travellers



	Leisure
Yes, already booked	13%
Yes, planning but not booked	13%
Somewhat likely to travel	11%
No	55%
Not sure	9%

Canadian Winter Travel Behaviour – By Demographics

Likely to Travel this Winter



Male
41%



Female
32%

18-34	34-54	55+
41%	39%	31%



With Children
42%



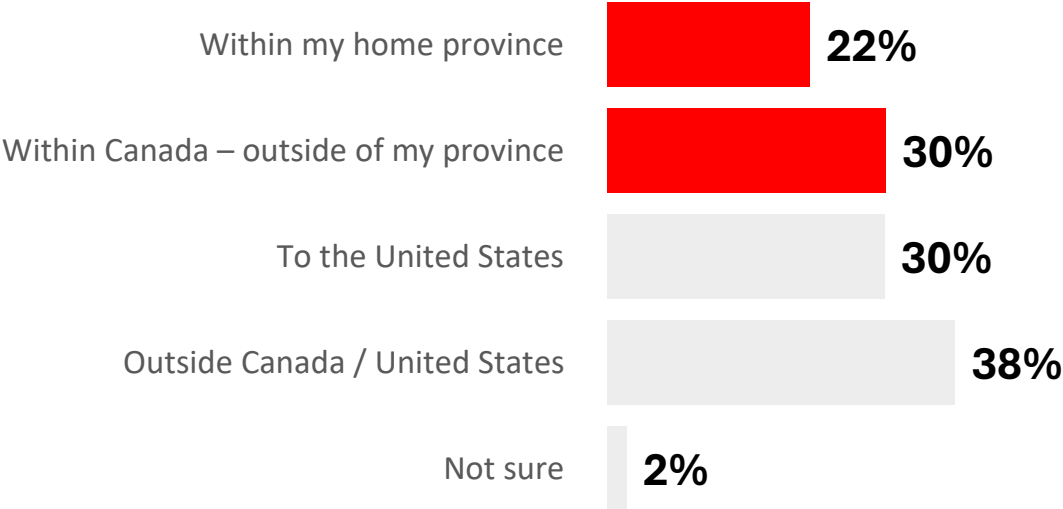
Without Children
34%

Men, 18 to 54-year-olds, and those with children <18 years are **more likely** to travel for leisure this winter.

Regionally, Ontarians are the **most likely** to be travelling this winter, while Quebec residents are the **least likely**.

Winter Travel Destinations

Canadian leisure travellers are more likely to plan to travel **outside** Canada this winter, with travel to international destinations outside North America being most prevalent.



47% of Canadians are planning to travel **within Canada**

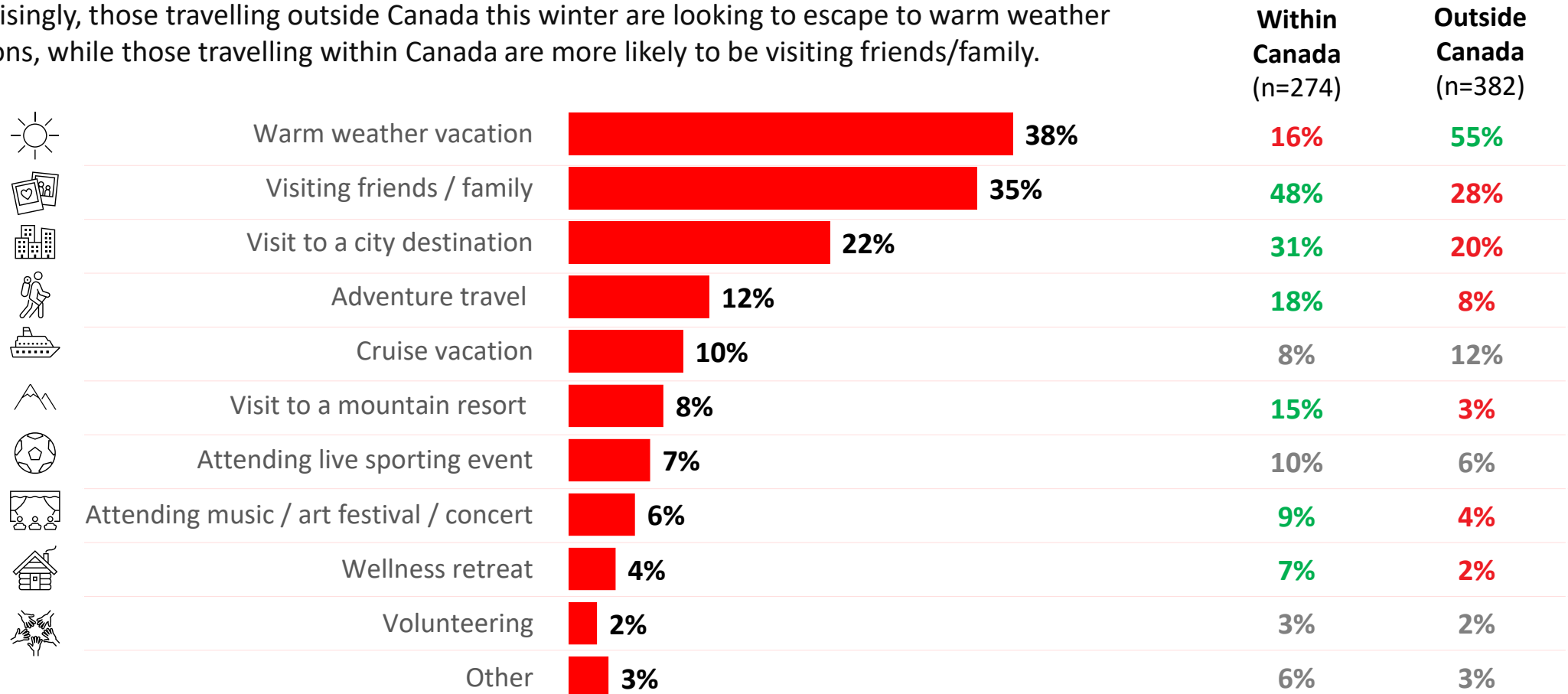


62% of Canadians are planning to travel **outside Canada**

Type of Vacation This Winter

Travel to warm weather destinations and visiting friends/family are the most popular trip types.

Not surprisingly, those travelling outside Canada this winter are looking to escape to warm weather destinations, while those travelling within Canada are more likely to be visiting friends/family.













Significantly higher than comparison group(s)

Significantly lower than comparison group(s)

Type of Vacation This Winter – By Demographics

Compared to their older counterparts, younger travellers are more varied in the types of trips they plan to take this winter. 18 to 34-year-olds are more likely to travel to city destinations, take adventure trips, visit mountain resorts, and attend live sporting events, while those aged 55+ are most likely to be taking warm weather vacations.

Type of Winter Travel	Total	18-34	35-54	55+
n=	598	165	229	204
 Warm weather vacation	38%	25%	40%	47%
 Visiting friends / family	35%	39%	31%	36%
 Visit to a city destination	22%	27%	26%	15%
 Adventure	12%	18%	13%	5%
 Cruise vacation	10%	8%	11%	10%
 Visit to a mountain resort	8%	13%	7%	5%
 Attending live sporting event	7%	12%	7%	3%
 Music / art festival / concert	6%	8%	7%	3%
 Wellness retreat	4%	5%	4%	3%
 Volunteering	2%	3%	3%	1%

*Small sample size, interpret with caution

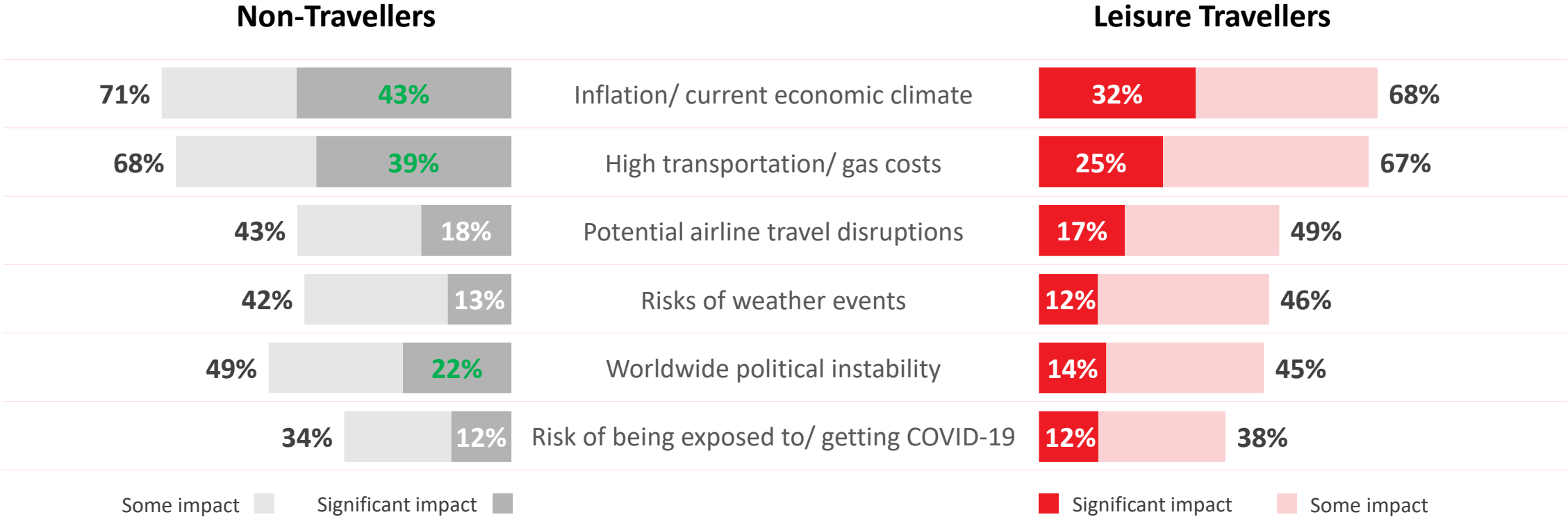
Base: Canadian residents who are planning to travel for leisure purposes this winter (n=598)
CTT3. Where are you planning to travel to during the winter (November to February)?

Significantly higher than comparison group(s)

Significantly lower than comparison group(s)

Factors Impacting Travel Plans

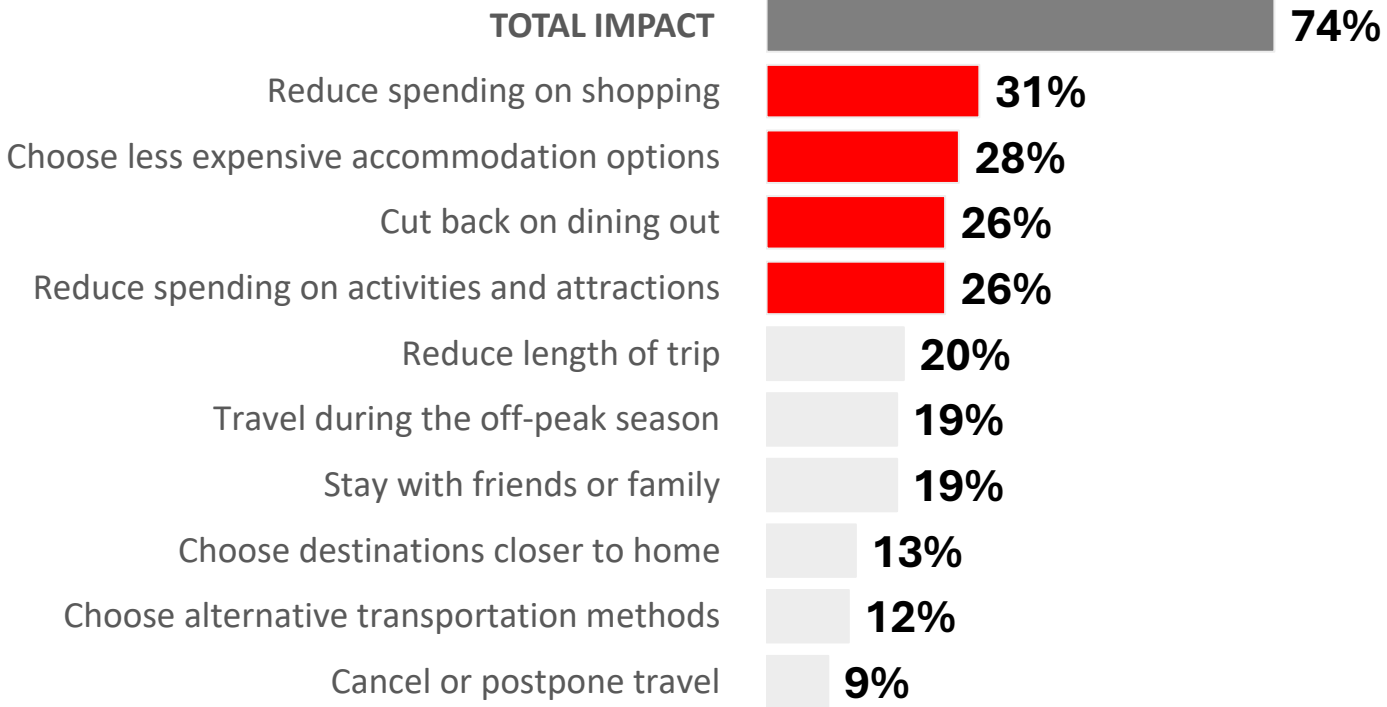
Inflation is dramatically impacting travel plans. Among the various factors that could potentially impact travel plans, inflation is having the greatest impact on both those who plan to travel for leisure this winter and those who do not. Non-travellers are more likely to be *significantly impacted* by inflation, high transportation costs, and political instability.



Significantly higher than comparison group(s)

How Travel Plans Have Been Impacted by Inflation

A significant proportion of Canadians who are planning to travel for leisure this winter are making compromises related to their travel spending, such as reducing shopping spend, choosing less expensive accommodations, cutting back on dining out, and reducing spending on activities/attractions. 1-in-10 are cancelling or postponing their trip altogether.



Main Reasons for Choosing Destinations Travelled to in Past 2 Years

Canadians enjoy travelling to visit friends and family. It is the top reason why Canadian leisure travellers chose a specific travel destination in the past two years, followed by exploring nature, visiting popular tourist attractions, and shopping.

Travel for food, music, and entertainment are travel trends to pay attention to. 3-in-10 chose a specific destination to experience the local food scene, while roughly 1-in-5 have visited a specific location to attend a music concert or to visit a region featured in a TV show/movie.



Main Reasons for Choosing Destinations Travelled to in Past 2 Years

British Columbians and Albertans are more likely to participate in nature/outdoor and cultural activities while on vacation.

Among Ontario residents, shopping and visiting environmentally sustainable destinations stand out, while Quebecers are more likely to choose destinations to attend a music concert/festival or visit a region featured in a show/movie.

Types of Leisure Travel	Total	BC	AB	MB/SK	ON	QC	ATL
n=	1,255	134	103	109	511	317	81
Visit family and friends	58%	61%	63%	55%	61%	47%	68%
Explore nature	40%	51%	46%	26%	37%	42%	27%
Visit popular/ iconic tourist attractions	37%	42%	39%	33%	38%	37%	24%
Go shopping	37%	39%	37%	33%	41%	29%	39%
Participate in outdoor activities	33%	38%	41%	23%	32%	33%	20%
Experience the local culinary/ food scene	30%	34%	40%	18%	34%	25%	18%
Immerse yourself in the local culture	28%	36%	36%	26%	28%	22%	20%
Attend a music concert / festival	21%	20%	22%	12%	22%	24%	21%
Participate in cultural events / festivals	20%	26%	20%	12%	21%	18%	11%
Visit a city / region featured in a TV show / movie	18%	19%	18%	13%	18%	22%	7%
Watch a live sporting event	18%	24%	21%	18%	18%	10%	16%
Experience the nightlife	17%	17%	18%	18%	19%	14%	11%
To take part in wellness activities (e.g., spa, yoga retreat)	13%	18%	14%	10%	13%	12%	4%
To visit an environmentally sustainable destination	12%	15%	9%	12%	15%	8%	6%
To engage with Indigenous culture / experiences	12%	20%	13%	8%	13%	8%	4%
To travel to a second home / property that you own	11%	12%	8%	10%	13%	8%	15%
To participate in a live sporting event	11%	15%	11%	7%	12%	9%	6%

Significantly higher than comparison group(s)

Significantly lower than comparison group(s)

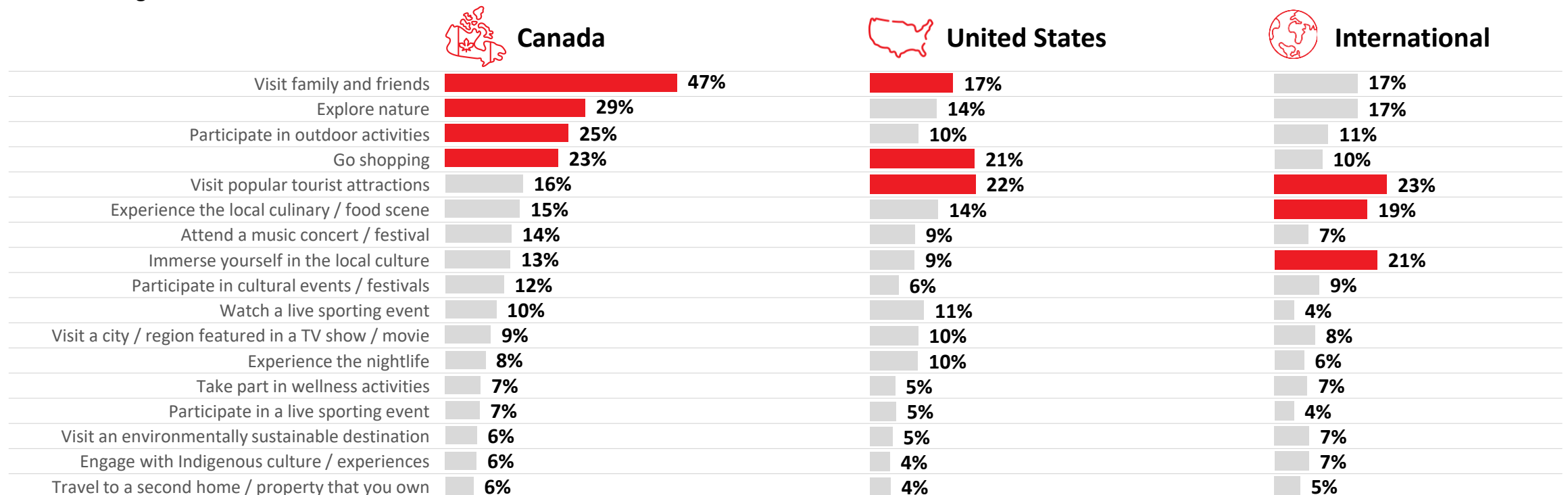
Base: Canadian residents who have travelled for leisure purposes in past 2 years (n=1,255)
CTO2. In the past 2 years, have you taken a leisure trip where the destination was chosen specifically for any of the following reasons? - Any
Travel Destination (Canada/ US/ International)

Main Reasons for Choosing Destinations Travelled to in Past 2 Years

– By Region

Travel motivations differ depending on whether travellers are visiting Canada, US, or international destinations:

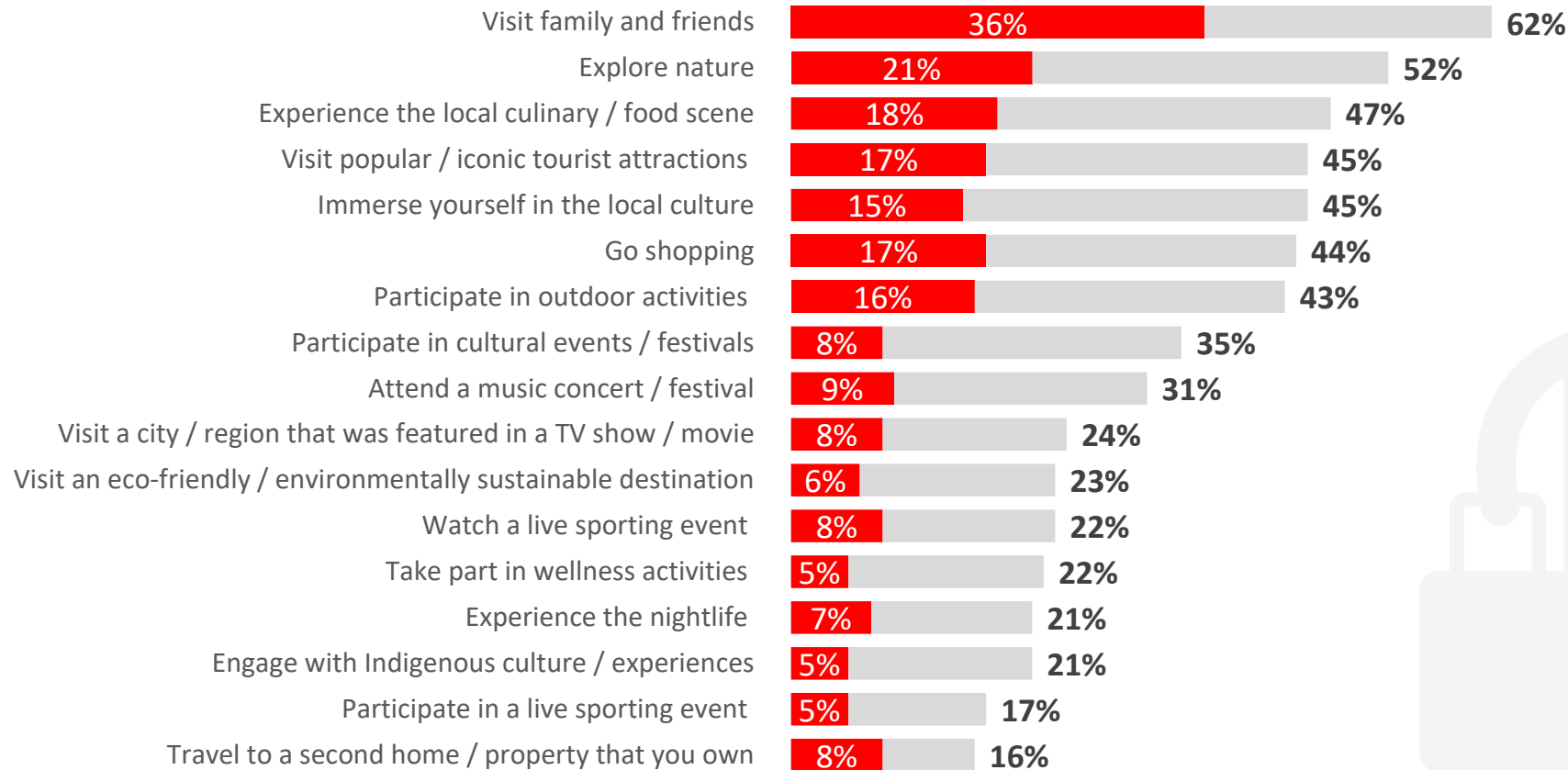
- Trips within Canada were mainly chosen to visit family and friends, followed by exploring nature.
- US destinations were selected for a variety of reasons, including to visit popular tourist attractions, go shopping, and visit friends/family.
- Visiting popular tourist attractions, immersing themselves in the local culture, and experiencing the local food scene were the main motivations for choosing international destinations.



Base: Canadian residents who have travelled for leisure purposes in past 2 years - Canada (n=1,228), United States (n=1,019), International (n=955). CTO2. In the past 2 years, have you taken a leisure trip where the destination was chosen specifically for any of the following reasons?

Type of Future Leisure Travel

Similar to past travel, visiting friends and family is the main reason for choosing future travel destinations, followed by exploring nature.



REPORT

Respondent Profile



Unweighted and Weighted Sample

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

	November 17-20,2023		December 8-11, 2023	
	Weighted	Unweighted	Weighted	Unweighted
Region	1,531	1,531	1,530	1,530
British Columbia	210	150	212	155
Alberta	171	126	170	132
Saskatchewan/Manitoba	99	127	99	125
Ontario	594	601	593	613
Quebec	354	426	354	405
Atlantic	102	101	103	100
Area	1,531	1,531	1,530	1,530
Urban	597	615	658	656
Suburban	620	604	605	592
Rural	297	299	257	274

	November 17-20,2023		December 8-11, 2023	
	Weighted	Unweighted	Weighted	Unweighted
Gender	1,531	1,531	1,530	1,530
Male	745	737	747	787
Female	786	794	783	743
Age	1,530	1,530	1,530	1,530
18-34	410	367	406	340
35-54	492	546	493	528
55+	629	618	631	662

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Appendix

Our Services

- **Leger**
Marketing research and polling
- **Customer Experience (CX)**
Strategic and operational customer experience consulting services
- **Leger Analytics (LEA)**
Data modelling and analysis
- **Leger Opinion (LEO)**
Panel management
- **Leger Communities**
Online community management
- **Leger Digital**
Digital strategy and user experience
- **International Research**
Worldwide Independent Network (WIN)

600
EMPLOYEES



185
CONSULTANTS



8
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