



Navigating the Future of Travel:

Economic Waves, Consumer
Trends, and Industry Insights



Steve Mossop
March 7, 2025



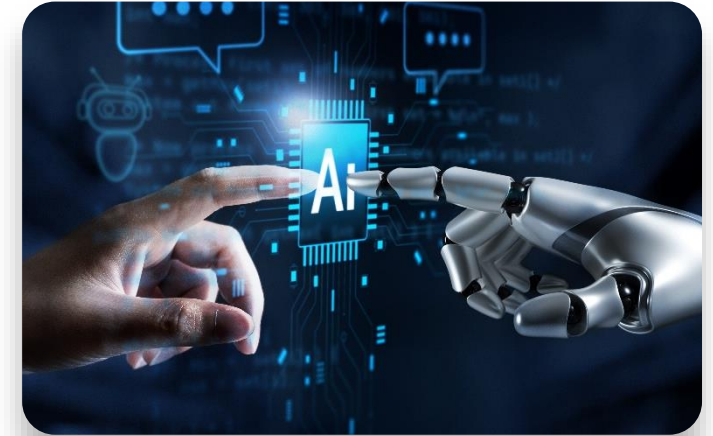
Presentation Outline



**Economic
Confidence**



**Travel
Intentions**



**Use of AI Driven
Tools for Leisure
Travel**

A little bit about Leger



8

offices in Canada coast to coast and the USA, and over

300

employees, including

235

consultants.

Last year, we conducted

5,626,037

online surveys and

249,523

telephone surveys.

LEO is the largest proprietary online panel, with over

500,000

members in North America.

- Most Accurate Polling Firm In Canada
- Largest and Best Panel in Canada
- Diverse Clients With Complex Mandates
- One-stop Shop-Full Service
- Efficient Operational Structure

The Travel and Tourism Specialization

Specialized Expertise

Dedicated team of 12 researchers who specialize in travel and tourism research.

Industry Thought Leadership

Regularly published insights through content pieces and press releases.

Extensive Experience

Proven track record with hundreds of travel and tourism projects.

Diverse Clientele

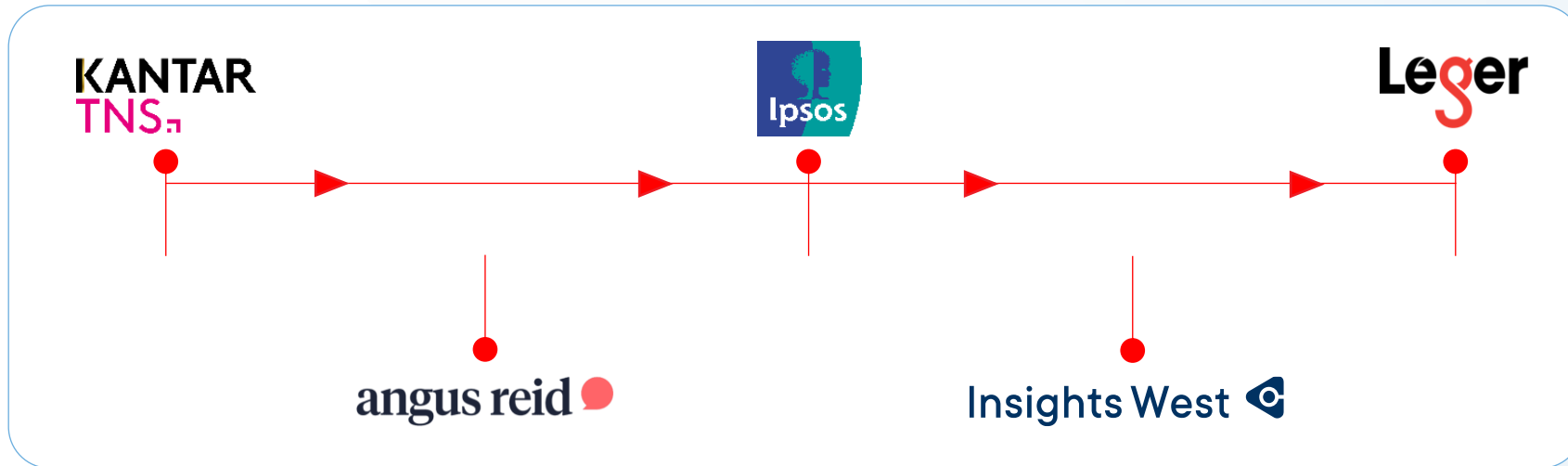
Trusted by destination organizations, airports, airlines, attractions, tourism associations, and hotels.

Comprehensive Research Solutions

Full-service qualitative and quantitative research.



I've Been in the **Research Industry**
for 40 **Years**, and I Learned the **Key To Success**
is **Asking The Right Questions**

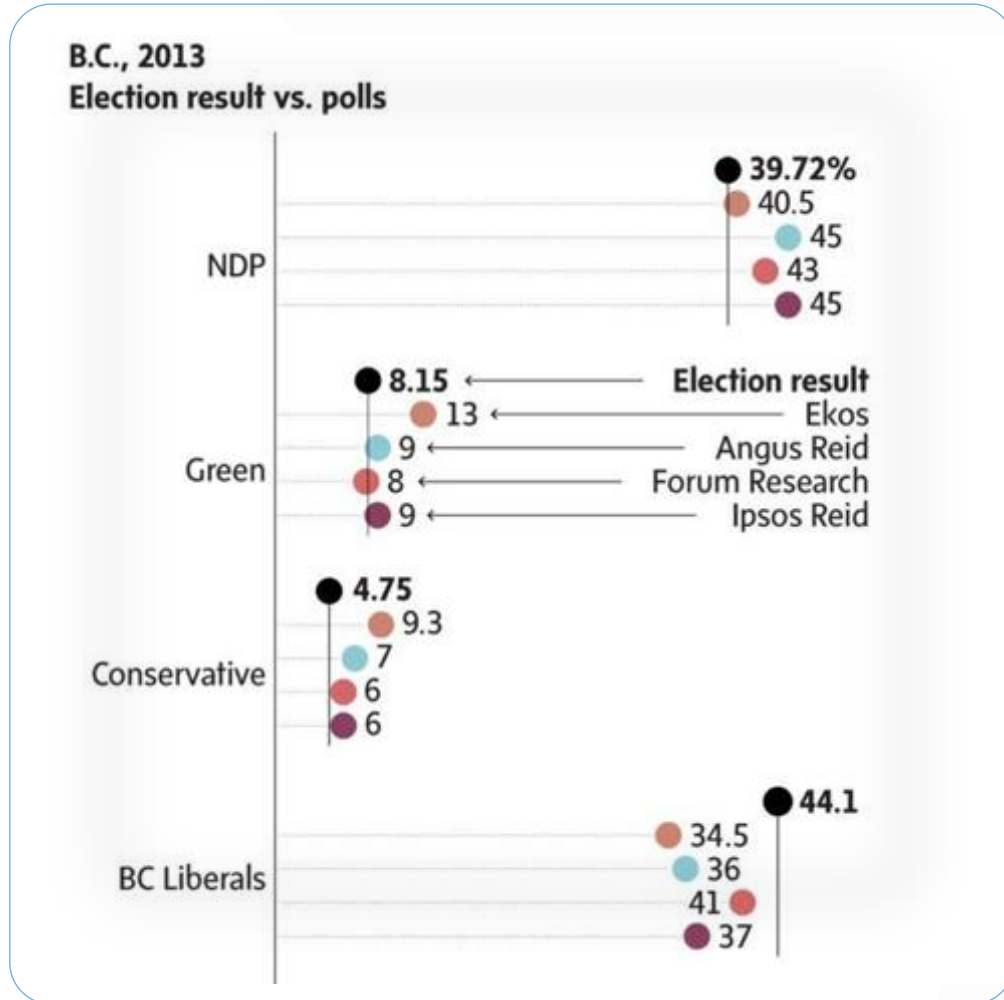


Remember The **Coke Marketing Disaster Of The** Mid-80's?



THEY DIDN'T
**ASK THE
RIGHT
QUESTION**
EITHER

I Experienced the **Failed Election Call** of Pollsters in the 2013 BC Election?
 THEY DIDN'T **ASK THE RIGHT QUESTION** EITHER



The Most Accurate Polling Firm in Canada

2024 BRITISH COLUMBIA PROVINCIAL ELECTION

	LEGER POLL Published on August 29, 2020	OFFICIAL RESULTS 2020 New Brunswick Provincial Election
BC NDP	46%	45%
BC greens	42%	43%
Others	9%	8%
	3%	4%

ALBERTA 2023

	LEGER POLL Published on May 31, 2023	OFFICIAL RESULTS 2023 May Provincial Election
	49%	52.56%
	46%	44.00%

QUEBEC 2022

	LEGER POLL Published on October 2, 2022	OFFICIAL RESULTS 2022 Quebec Provincial Election
CAQ	38%	40.97%
	15%	15.42%
Q	15%	14.60%
	17%	14.37%
	14%	12.92%

ONTARIO 2022

	LEGER POLL Published on June 1, 2022	OFFICIAL RESULTS 2022 Ontario Provincial Election
ONTARIO PC	40%	41%
LIBERAL ONTARIO	25%	24%
ONTARIO NDP	24%	24%
green	5%	6%
NEW BLUE	3%	3%
ONTARIO	2%	2%
Others	1%	1%

CANADA 2021

	LEGER POLL Published on September 18, 2021	OFFICIAL RESULTS 2021 Canadian Federal Election
C	33%	33.7%
L	32%	32.6%
NDP	19%	17.8%
BLOC Québec	7%	7.7%
PPC	6%	5.0%
	2%	2.3%

NEW BRUNSWICK 2020

	LEGER POLL Published on August 29, 2020	OFFICIAL RESULTS 2020 New Brunswick Provincial Election
NB PC	40%	39%
Liberal	32%	34%
	13%	15%
	7%	9%
	6%	2%

CANADA 2019

	LEGER POLL Published on October 20, 2019	OFFICIAL RESULTS 2019 Canadian Federal Election
L	33%	33%
C	33%	34%
NDP	18%	16%
BLOC Québec	8%	8%
	6%	7%
PPC	2%	2%













What is on the Minds of Canadians?



*“The **economic crisis** is the worst in a decade, driven by high inflation/interest rates, but Trump/Tariffs have sprung onto the scene and united Canadians.”*

Most Important Issue Facing Canadians

	SEP 2023 (n=2,142)	JAN 2024 (n=2,043)	JUL 2024 (n=2,620)	FEB 2025 (n=1,548)
 TARIFFS/TRUMP	–	–	–	28%
 INFLATION	24%	21%	19%	21%
 Healthcare	13%	15%	14%	11% ↓
 Housing affordability	17%	17%	17%	11% ↓
 Government debt	3%	5%	6%	5%
 Immigration	2%	3%	6%	5%
 Taxes	4%	4%	4%	4%
 Climate change	9%	9%	8%	3% ↓
 Poverty	5%	5%	4%	2% ↓
 Homelessness	3%	4%	4%	2% ↓

Subgroup Differences

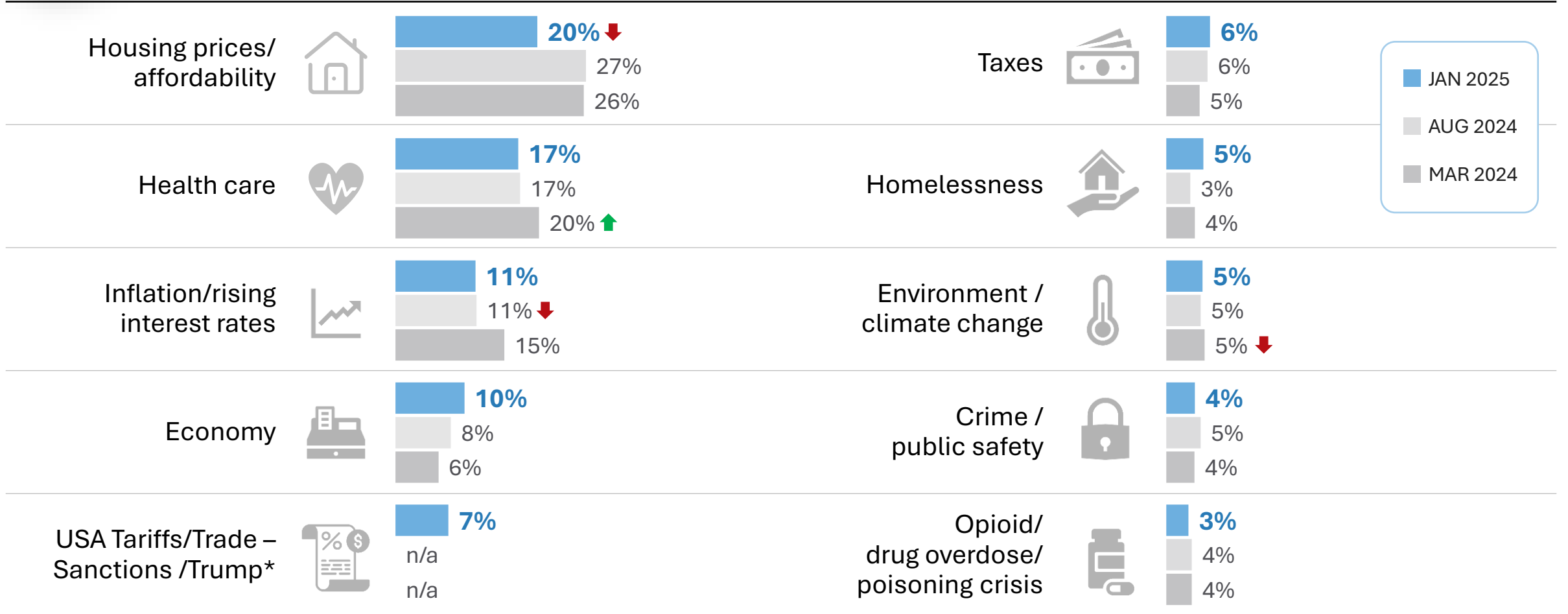
- Healthcare top priority for 55+
- Housing affordability #1 for 18-34
- Inflation #1 for 35-54
- Conservative voters care about taxes/debt/Economy
- Liberals care about tariffs housing, climate change





BC Issues – Most Important:

Aided – Tracker



*New option in Jan 2025. Base: All respondents (n=1,001).

Q. In your view, what is the most important issue facing British Columbia today?

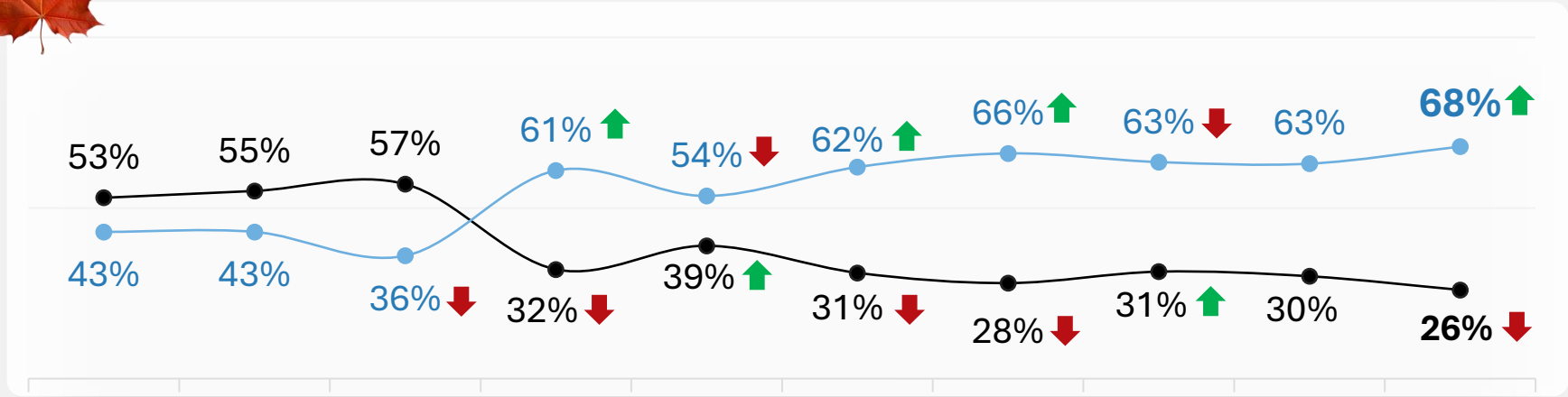
↑↓ Statistically significantly higher/lower than previous wave



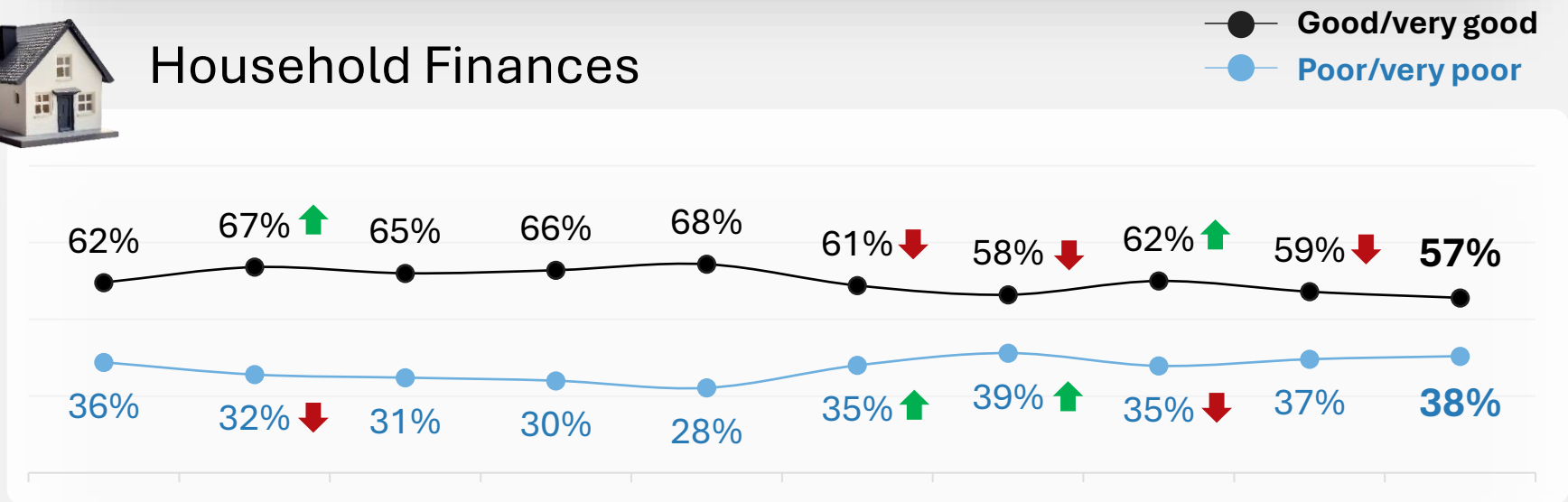
Canada Economy

Current Economic Perceptions

Economic confidence for the country and for households are at all-time lows.



Household Finances



Leger Economic Confidence Study.
 Base: 2,645 Canadian adults aged 18+
 Q. How would you describe the economic conditions in Canada today? How would you describe your own household's finances today?

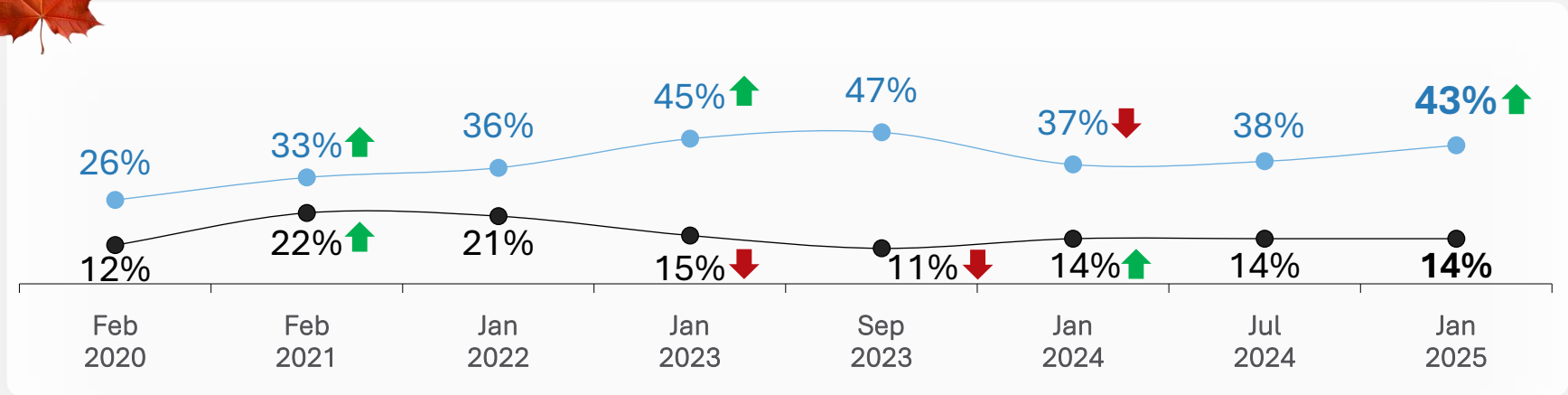
Future Economic Confidence

Future economic confidence shows a bleak outlook

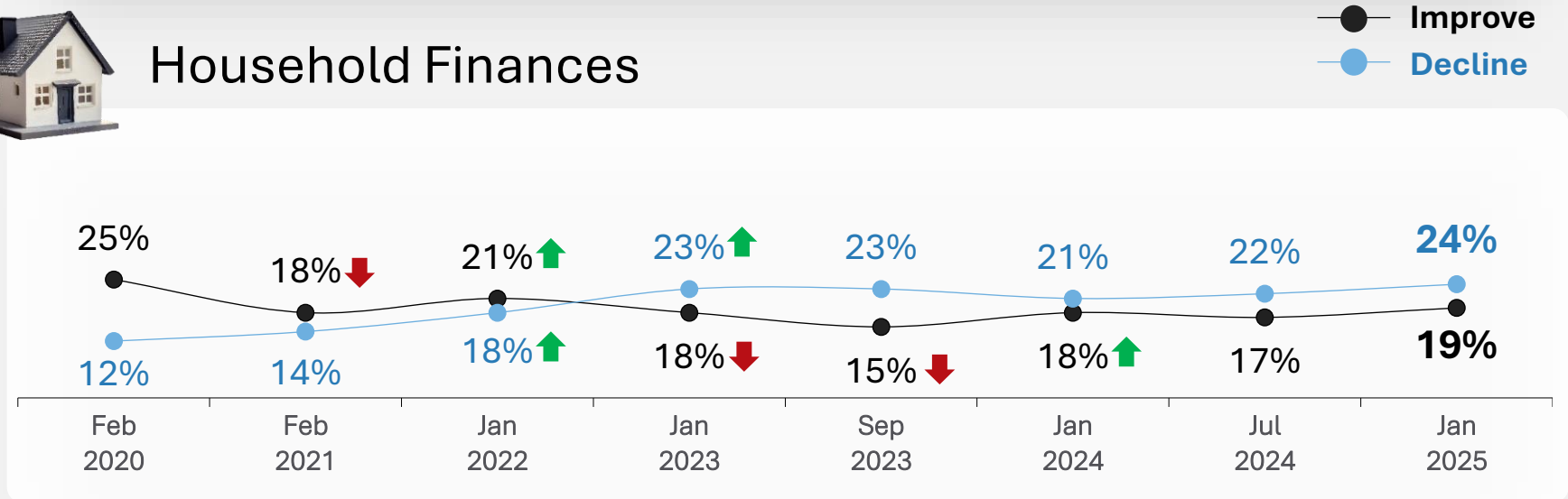
- 46% are living paycheque to paycheque
- 50% believe we are in a recession



Canada Economy



Household Finances



Economic Confidence Study. Base: 2,645 Canadian adults aged 18+.

Q. Over the next six months, do you expect the Canadian economy to improve, remain the same, or decline?

Q. Over the next six months, do you expect your own household's finances to improve, remain the same, or decline?

↑ ↓ Statistically significantly higher/lower than previous wave

Patriotism on the Rise



*“The announcement of **Trump/Tariffs** and insinuations of the **51st state** have **enraged** Canadians, changed our political landscape, and unleashed a deluge of consumer purchase patterns and choices that will have a **dramatic impact** on businesses on both sides.”*

Overall Impression of President Donald Trump



	Total CANADA	Total USA	GAP
<i>Weighted n=</i>	1,534	1,007	
<i>Unweighted n=</i>	1,534	1,007	
Favourable*	14%	42%	28
Unfavourable	77%	44%	33
Don't know enough about him	5%	6%	1
Unsure	4%	8%	4

*Our poll this week shows approval ratings dropped to 12%

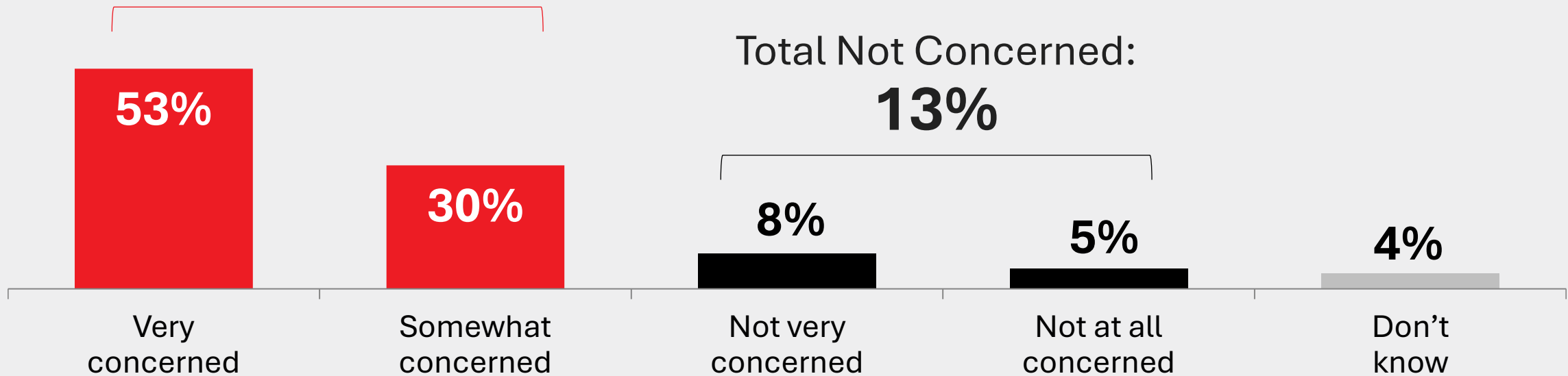
Base: All respondents

Q21Z. Overall, do you have a favourable or unfavourable impression of President Donald Trump? If you do not know enough about him to have an opinion indicate so.

Concerns About U.S. Trade Pressure for Closer Canada-U.S. Union



Total Concerned:
83%



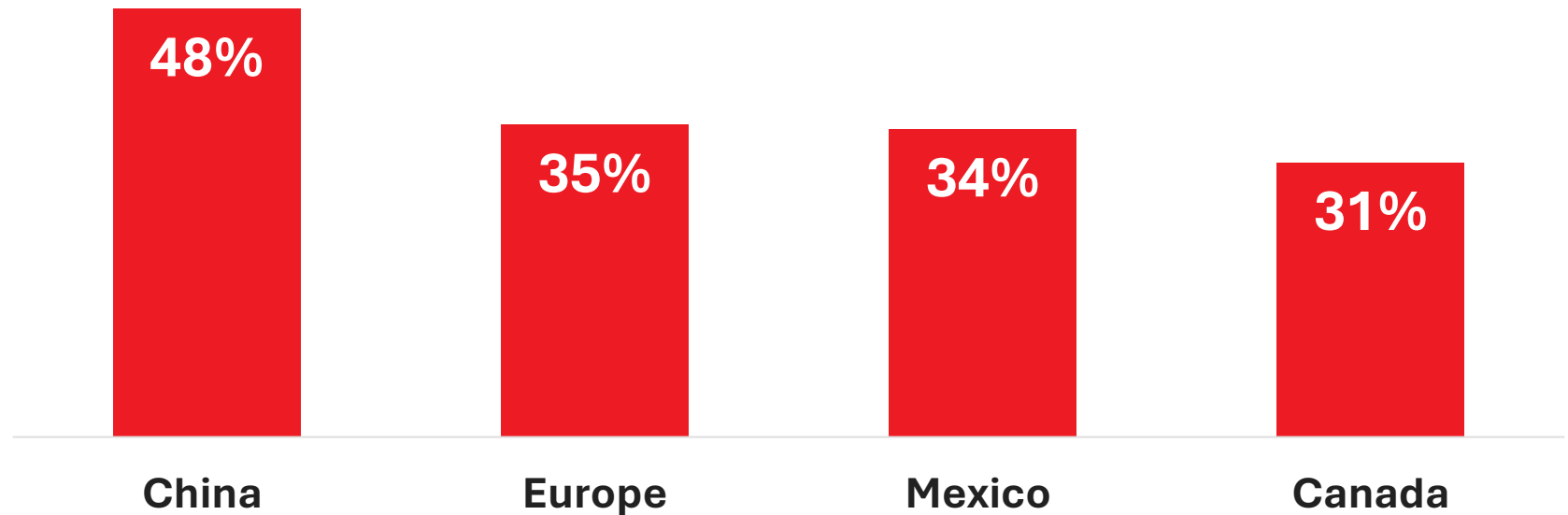
Base: All respondents (n=1,534)

Q3Z. How concerned are you that President Trump will use various means, such as tariffs and trade sanctions, to try and force Canada into a much closer and more formal union with the United States?

American Support for Tariffs on Imports from Specific Countries



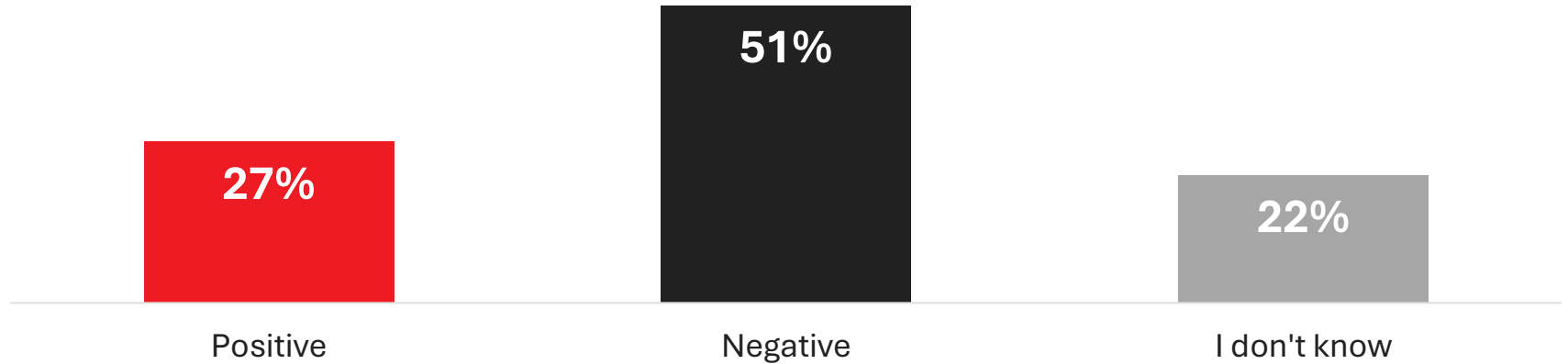
% In Favour



Base: US respondents (n=1,002)

Are you in favor or opposed to the Trump administration imposing tariffs on products imported from the following countries or regions?

Perceived Impact of Trump Administration's Tariffs on the U.S. Economy



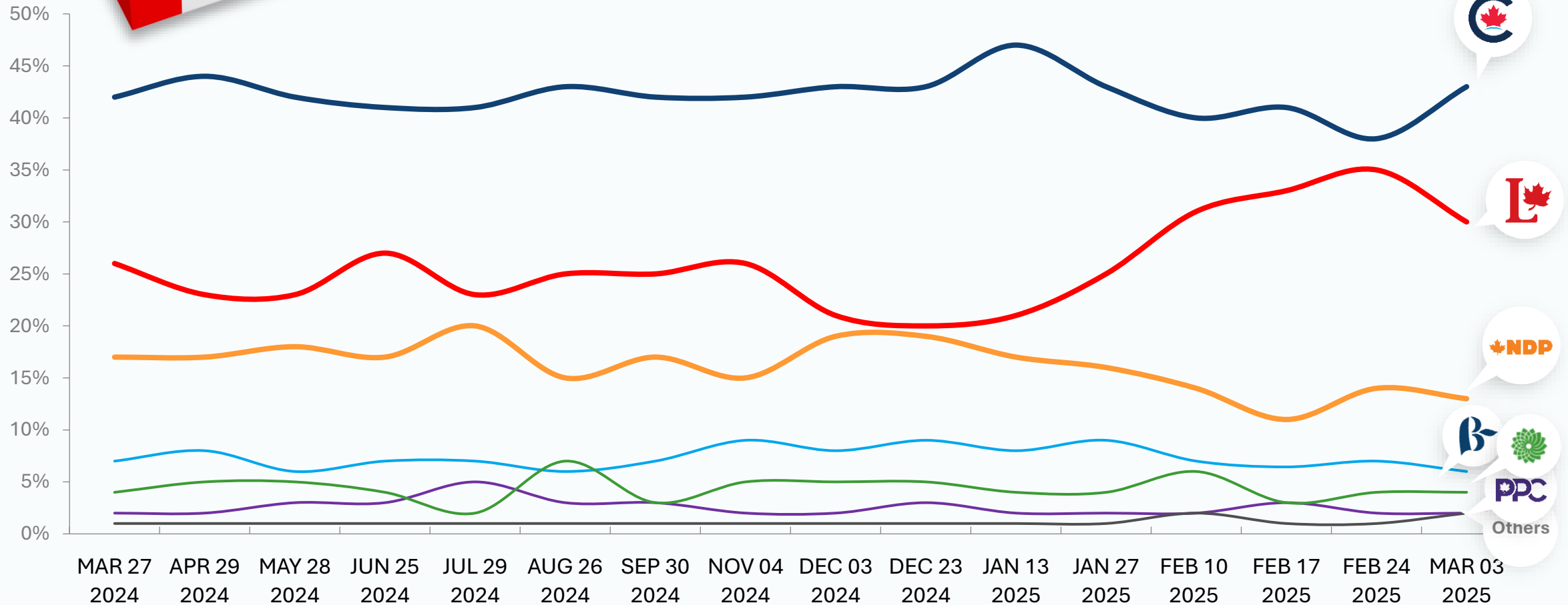
	Total U.S.	North East	Mid West	South	West	18-34	35-54	55+	Male	Female	Republican	Democrat	Total Feb.24 th 2025	Gap
<i>Weighted n=</i>	1,002	178	209	384	231	287	340	374	489	513	275	308	1,007	
<i>Unweighted n=</i>	1,002	184	206	394	218	177	386	439	490	512	292	313	1,007	
Positive	27%	26%	29%	30%	23%	23%	30%	29%	35%	20%	53%	10%	29%	-2
Negative	51%	50%	50%	50%	52%	54%	47%	52%	47%	54%	24%	77%	49%	+2
I don't know	22%	23%	21%	20%	25%	24%	23%	19%	18%	26%	23%	13%	22%	-

Base: American respondents (n=1,002)

Q. Do you believe that tariffs on imports from other countries imposed by the Trump administration will have a positive or a negative effect on the US economy?



Evolution of Voting Intentions in Canada



*Official results from Elections Canada

Voting Intentions with Different Canadian Liberal Party Leaders



Justin TRUDEAU
(n=1,293)



VOTING INTENTIONS



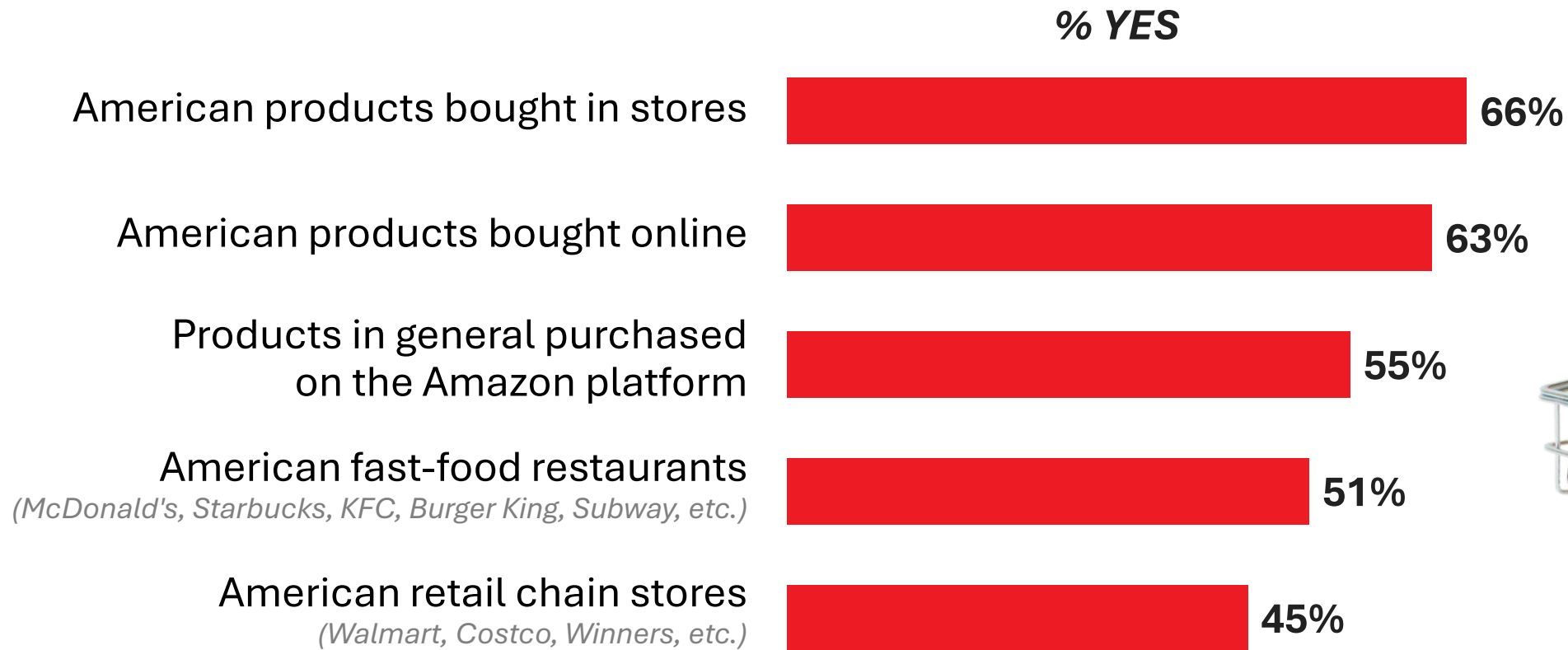
Mark CARNEY
(n=1,251)



+3



Recent Changes in Canadian Consumer Purchasing Behaviour



Base: All respondents (n=1,534)

Q5Z. In the past few weeks, have you decreased your purchases of...?

Recent Changes in Consumer Purchasing Behaviour



Total
CANADA



Total
USA

% YES

GAP

	Weighted n= Unweighted n=	1,534 1,534	1,007 1,007	
American/ Canadian products bought in stores		66%	12%	54
American/ Canadian products bought online		63%	12%	51
Products in general purchased on the Amazon platform*		-	-	-
American/ Canadian fast-food restaurants		51%	12%	39
American/ Canadian retail chain stores		45%	11%	34

*This item was asked only to Canadians respondents.

Base: All respondents

Q5Z. In the past few weeks, have you decreased your purchases of...?

Perception of the United States/Canada as an Ally, Neutral, or Enemy



Total
CANADA

Total
USA

GAP

	<i>Weighted n=</i> <i>Unweighted n=</i>	1,534 1,534	1,007 1,007	
An ally		31%	56%	25
A neutral country		25%	29%	4
An enemy country		27%	1%	26
DK / Refusal		16%	14%	2

Base: All respondents

Q8Z. Do you consider the United States/Canada to be an ally, a neutral country, or an enemy country?

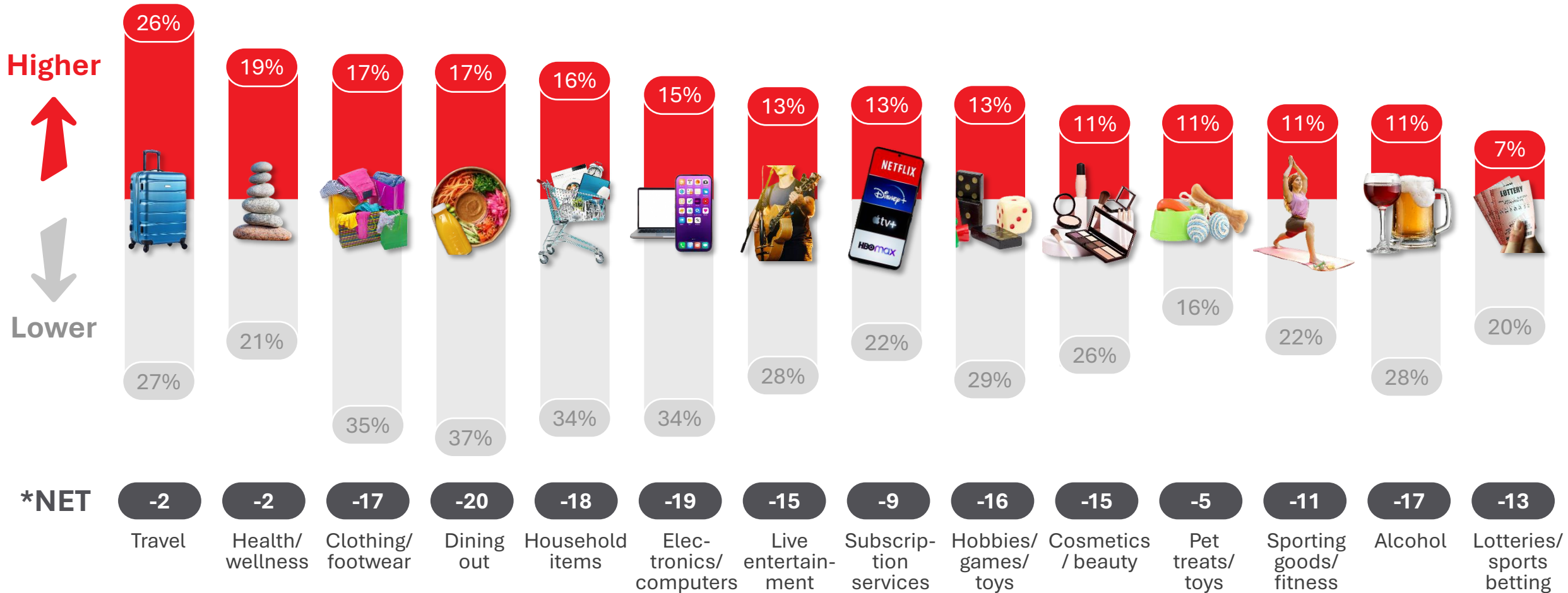
Travel Perceptions & Behaviours



*“The **good news** is that despite declining economic confidence, travel remains a top priority.*

*But Trump/Tariffs have **RADICALLY** changed travel intentions & behaviours.”*

Canadians' Discretionary Spending Expectations



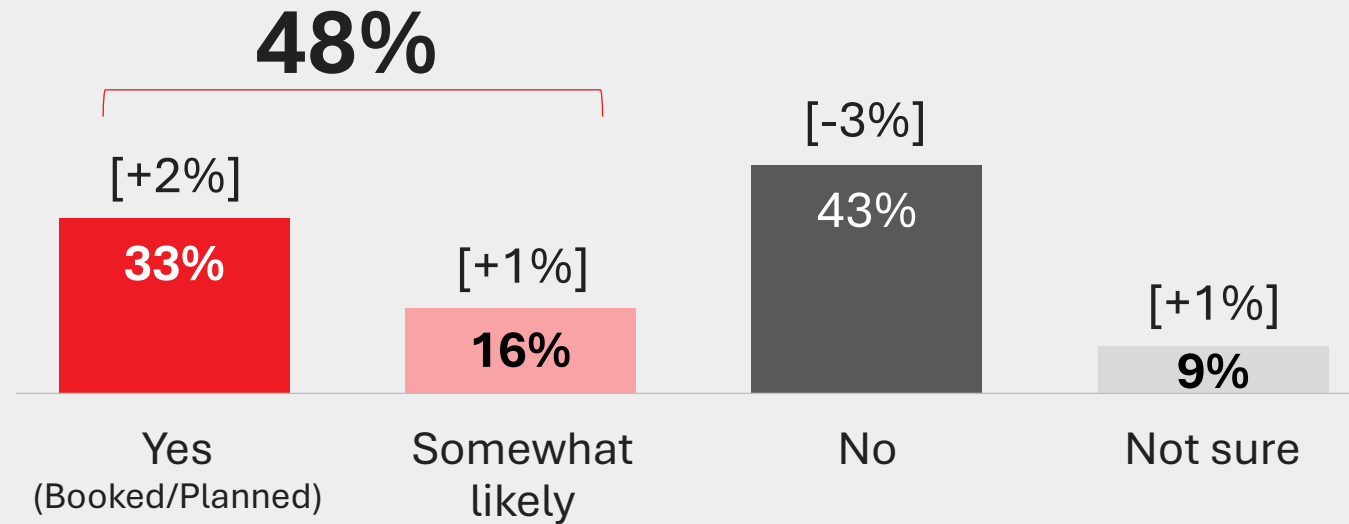
*% higher spending minus % lower spending.

Q. In the next 6 months do you expect your discretionary spending to be higher, about the same or lower on each of the following compared to the past 6 months? If you don't buy in any of these categories, please choose the last option.

Canadians' Spring Travel Plans (BEFORE TARIFFS)



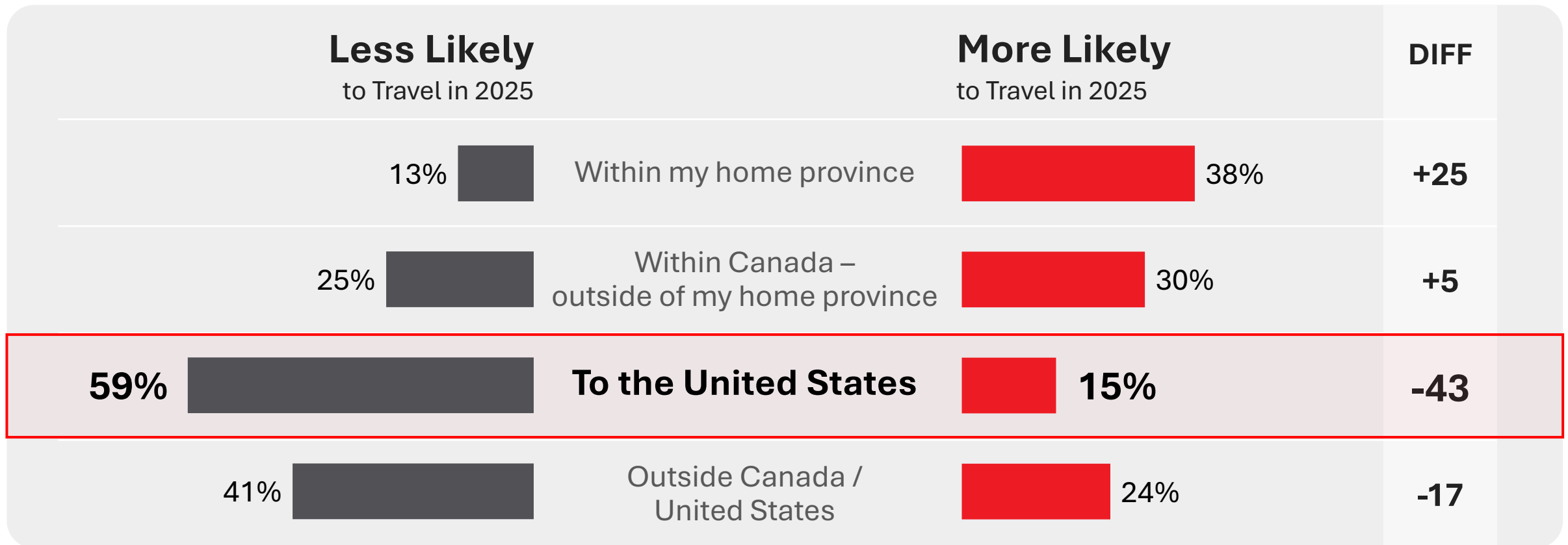
Plan to take leisure trip during the spring 2025



Base: Canadian adults 18 years of age and older. 2025 (n= 1,533), 2024 (n=1,527) – 2025 Omni conducted February 1-2, 2025 and 2024 Omni conducted March 8-10, 2024.

Q. Are you planning to take a leisure trip during the spring (March to June 2025/2024)?

Canadians' Change in Leisure Travel Destinations: 2025 vs. 2024

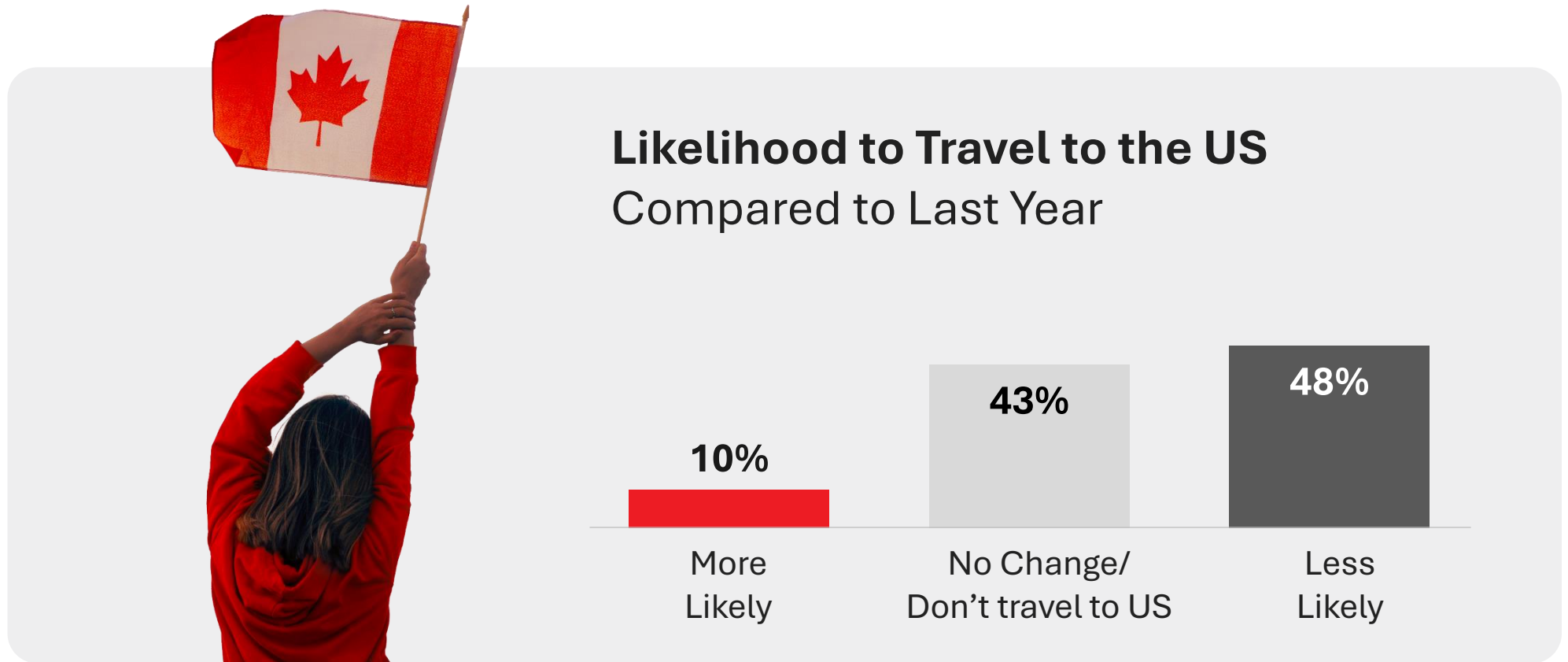


Base: Canadian adults 18 years of age and older. 2025 (n= 1,533)

Q. How is your likelihood of travelling for leisure to the following destinations in 2025 compared to last year?

Impact of Political Tension

Between Canada and the U.S. on Canadians' Likelihood to Travel to the U.S.



Base: Canadian adults 18 years of age and older. 2025 (n= 1,533)

Q. How, if at all, has the recent political climate, and the tensions between Canada and the United States, affected your likelihood to travel to the United States compared to last year?

Cancellation of Travel Plans to the United States



Total CANADA



Total USA

GAP

	Weighted n= Unweighted n=	1,534 1,534	1,007 1,007	
Yes		15%	4%	11
No		35%	47%	12
Does not apply <i>(I didn't have a trip planned)</i>		50%	49%	1

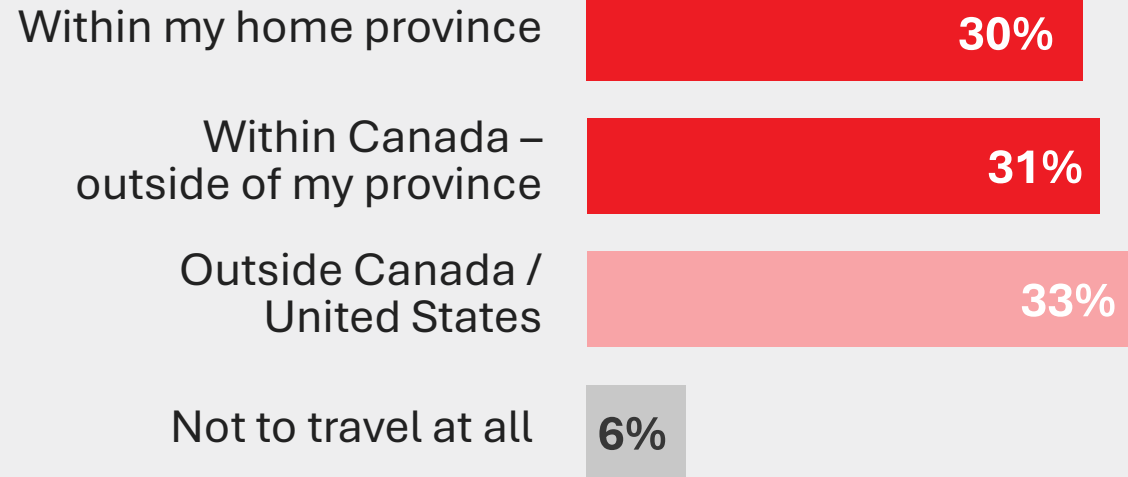
Base: All respondents

Q7Z. Have you cancelled a trip to the United States/Canada?

Travel Destinations

for Canadians Less Likely to Travel to the U.S. in 2025

Where Travellers are Going Instead of the U.S.?



61%
WITHIN CANADA



Base: Canadian adults 18 years of age and older who are less likely to travel to the US this year compared to last year. (n=747)

Q. Where, if at all, are you more likely to travel instead?

Use of AI in Travel



*“While AI has taken the business world by storm, a **fairly small percentage** of Canadians have incorporated AI into their travel planning behaviours.”*

Familiarity with AI Tools is High

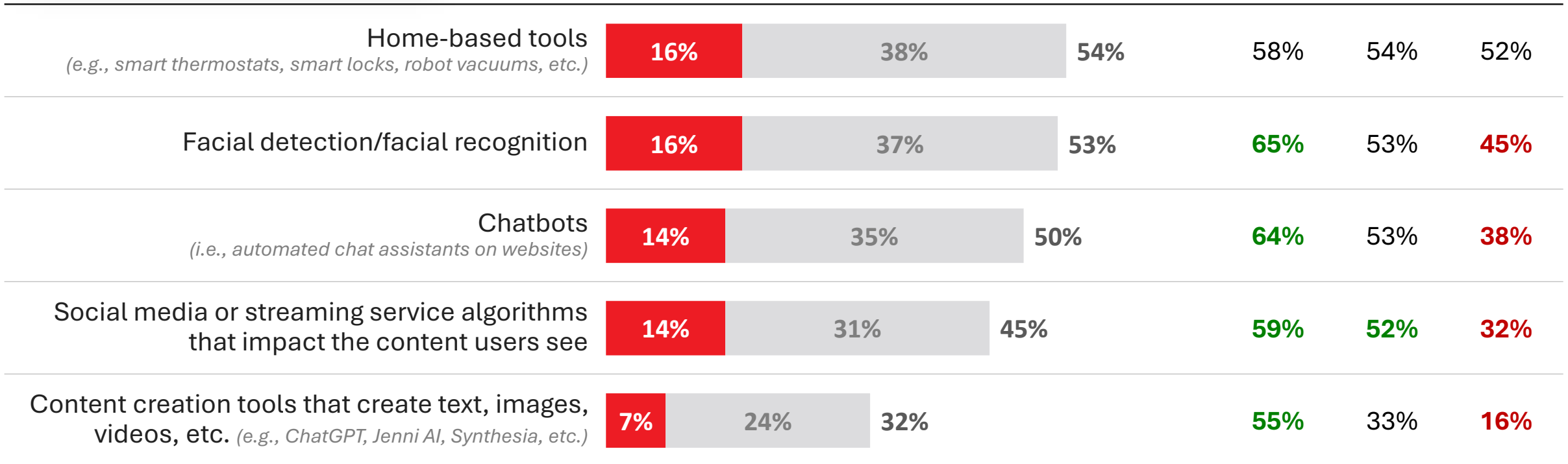


USA results are 5 to 8 points higher

■ Very familiar ■ Somewhat familiar

AGE
(Total Familiar)

18-34 (n=405)	35-54 (n=570)	55+ (n=639)
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Base: All respondents (May 2024 n=1,614)

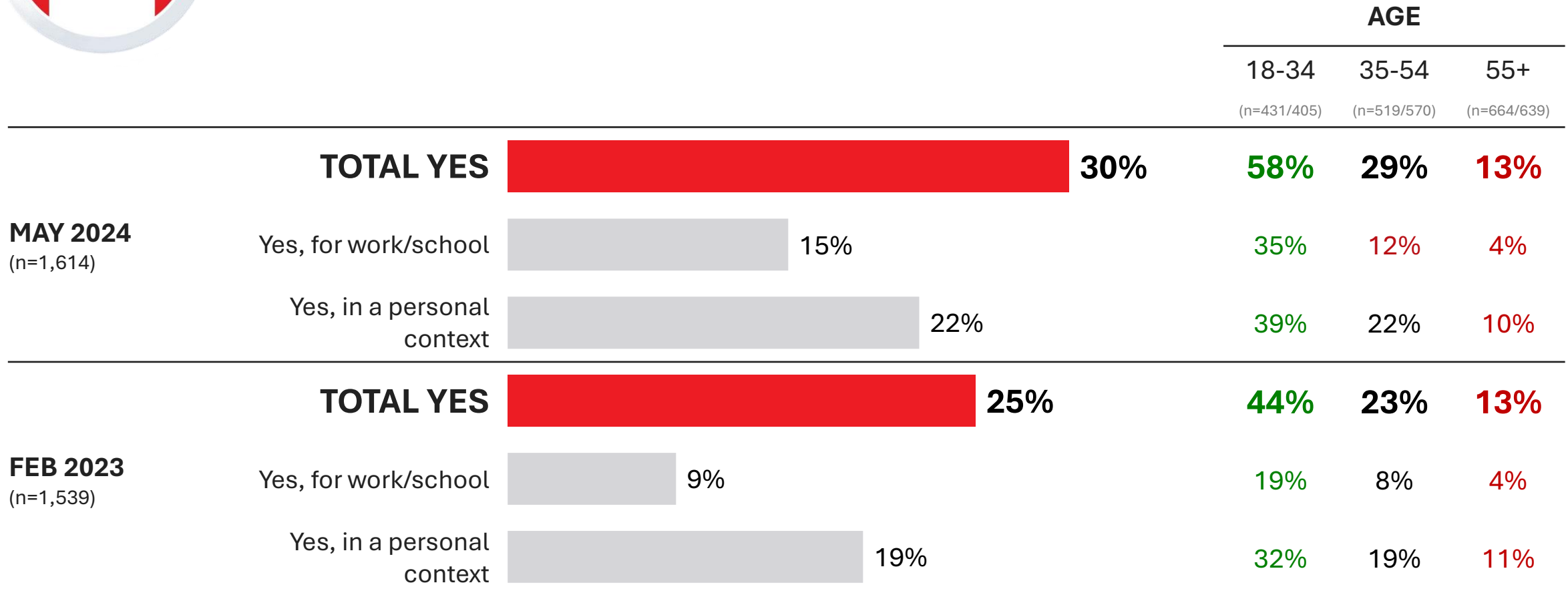
Q. How familiar are you with each of the following types of AI tools?

Statistically significantly **higher** than comparison group(s).

Statistically significantly **lower** than comparison group(s).



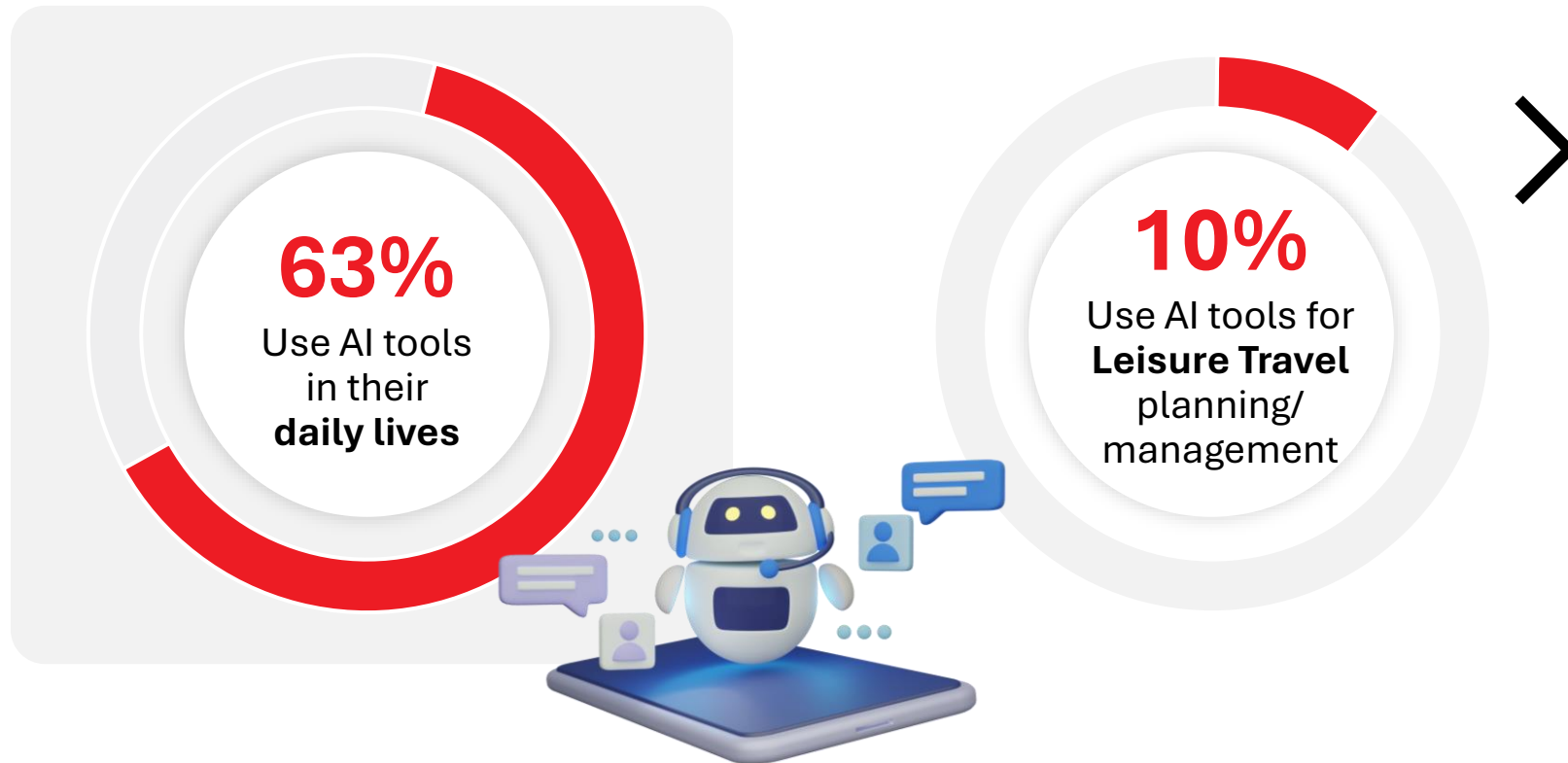
Use of AI Tools In Canada



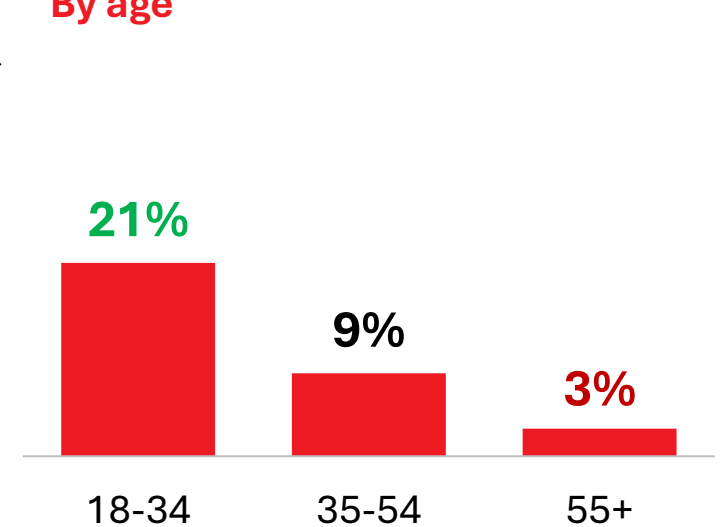
Base: All respondents
Q. Have you ever used an AI tool?

Statistically significantly **higher** than comparison group(s).
Statistically significantly **lower** than comparison group(s).

Use of AI for Booking or Managing Leisure Vacation



Use AI Tools for Leisure Travel
By age

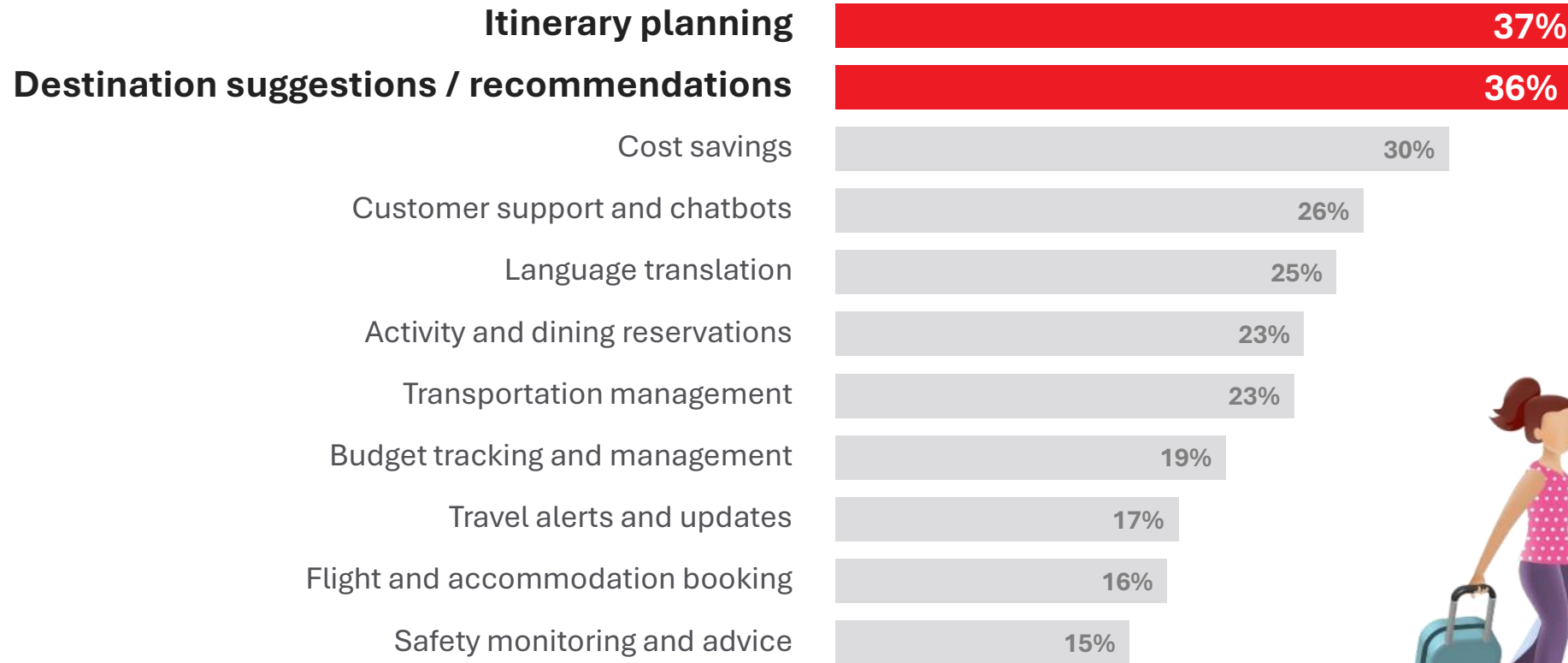


Base: All respondents (n=1,553 Canadian adults)

Q. Have you ever used AI (artificial intelligence)-driven tools for planning, booking or managing your leisure vacations?

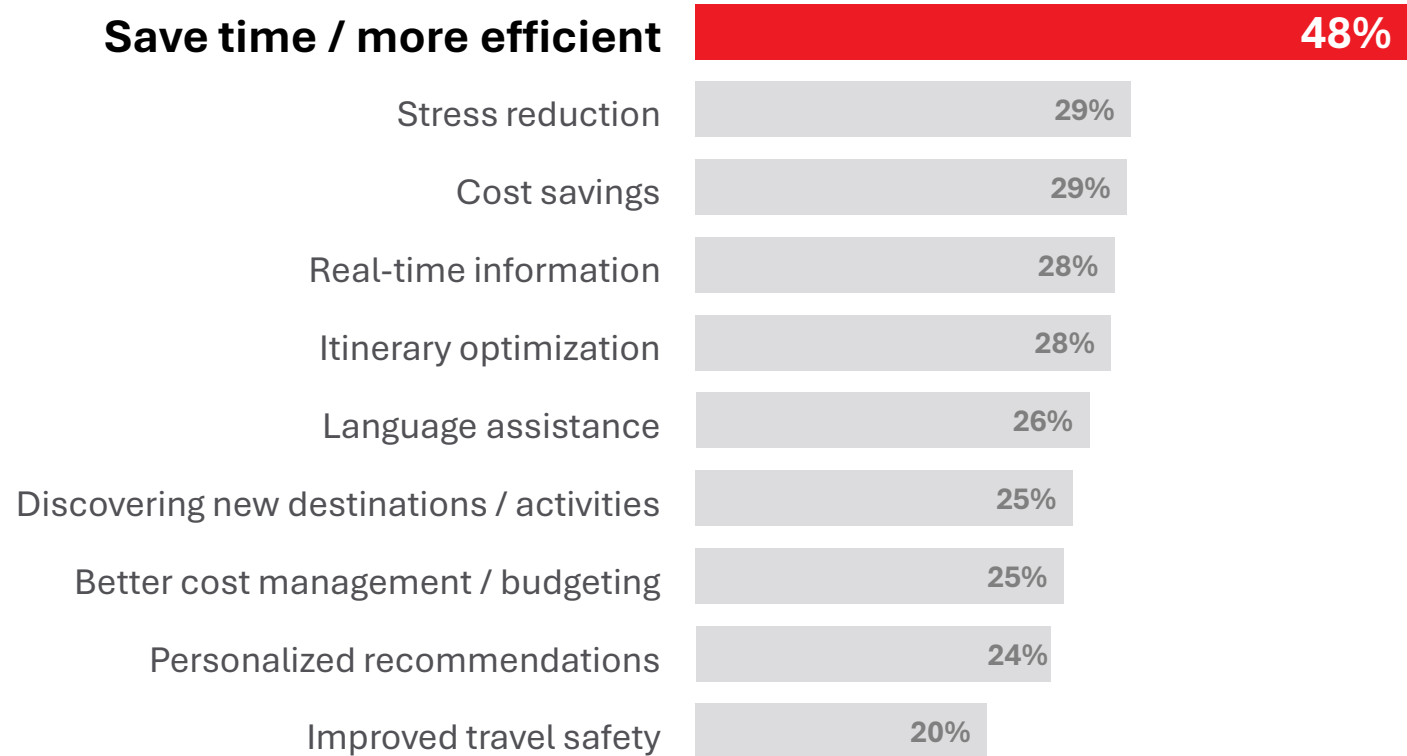
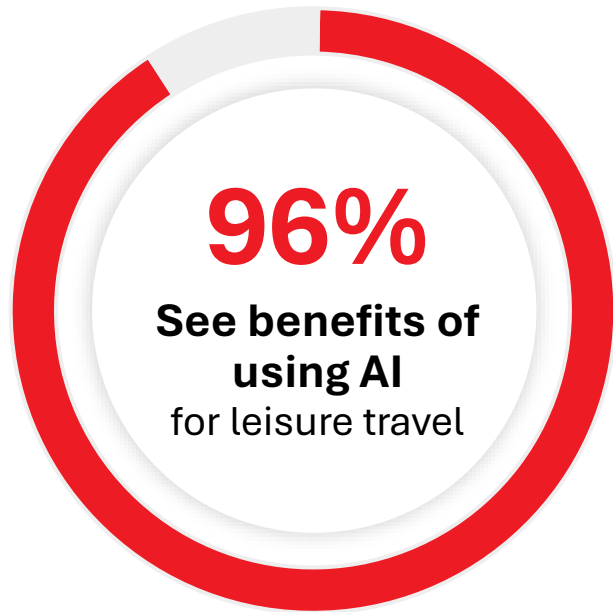
Statistically significantly **higher** than comparison group(s).
Statistically significantly **lower** than comparison group(s).

Main Uses of AI for Leisure Vacation Planning and Management



Base: Canadians who have ever used AI-driven tools for planning, booking or managing your leisure vacations (n=180)
 Q. For what activities have you used AI-driven tools during your vacation planning / management?

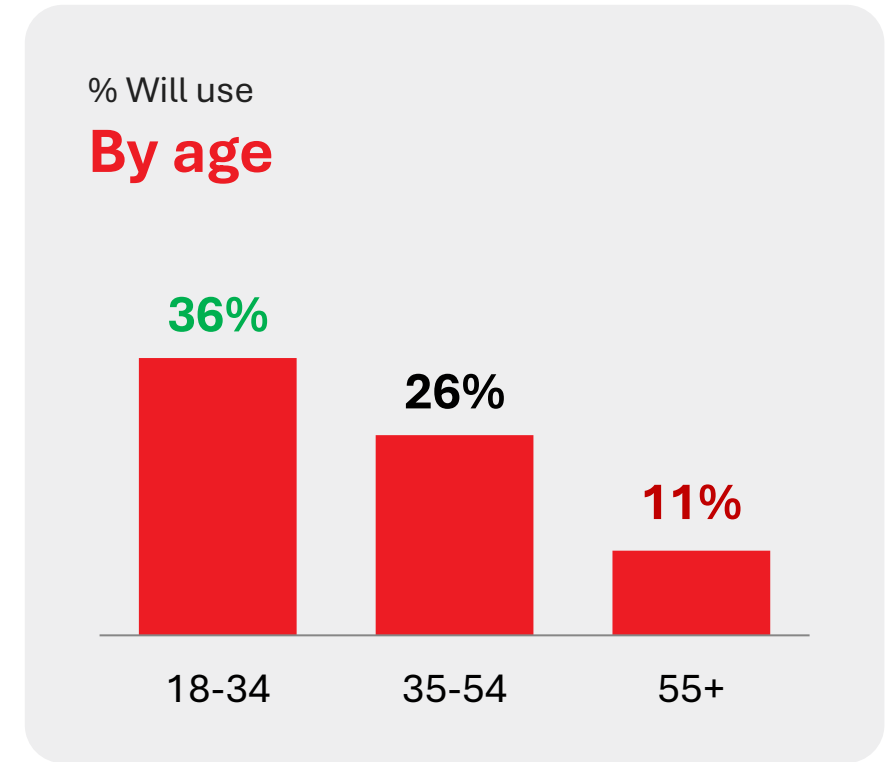
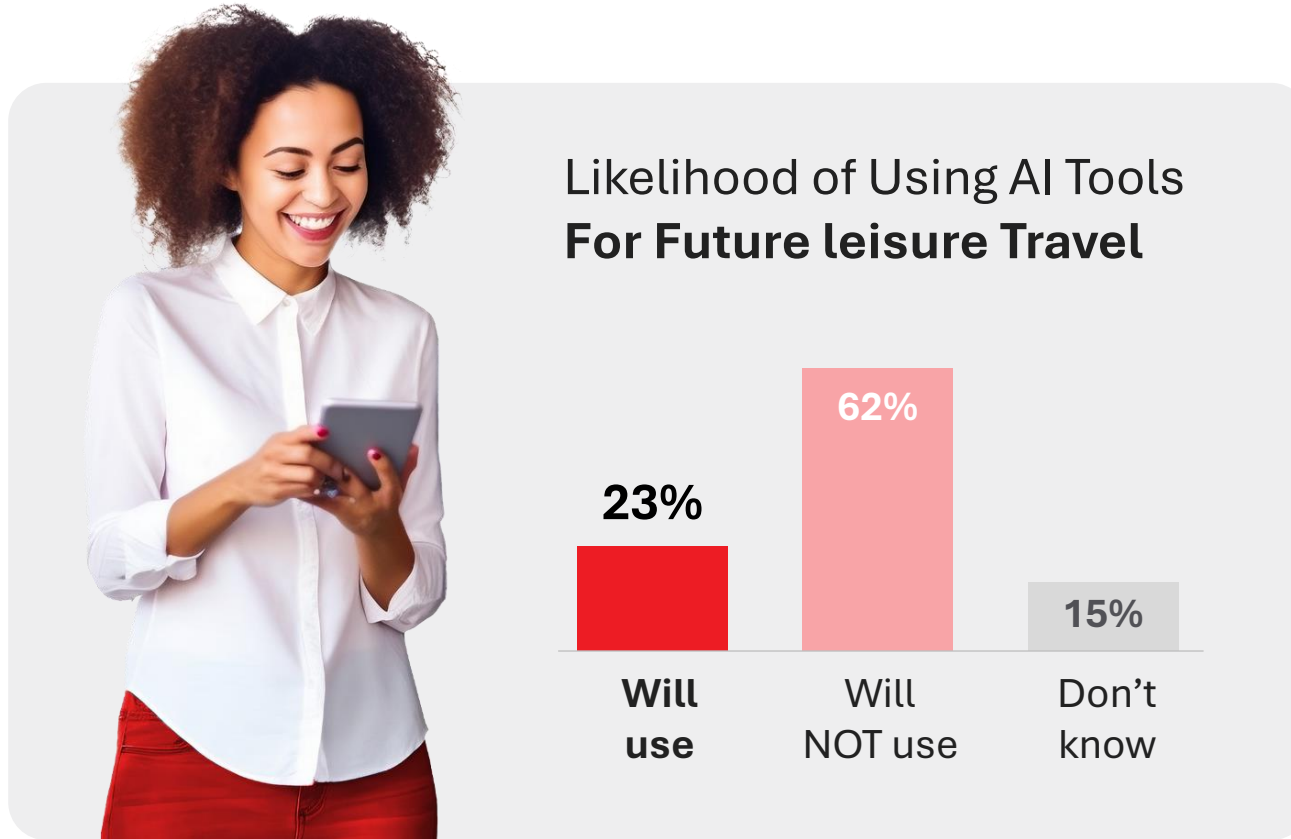
Key Benefits of Using AI for Leisure Vacation Planning and Management



Base: Canadians who have ever used AI-driven tools for planning, booking or managing your leisure vacations (n=180)

Q. What benefits or advantages have you gained from using AI-driven tools to plan or manage your leisure vacations?

Likelihood of Using AI for Planning Next Leisure Vacation

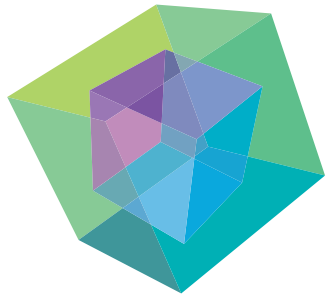


Base: Canadian adults 18 years of age and older (n=1,553)

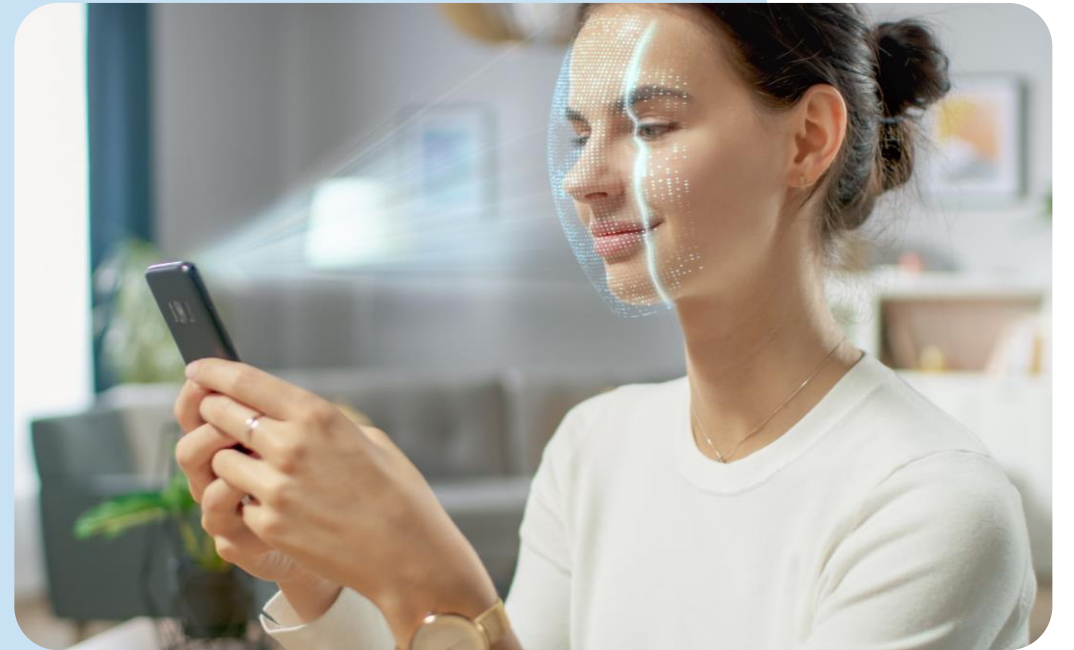
Q. How likely are you to use AI-driven tools to plan your next leisure vacation?

Statistically significantly **higher** than comparison group(s).

Statistically significantly **lower** than comparison group(s).



CUBE AI
Powered by **Leger**

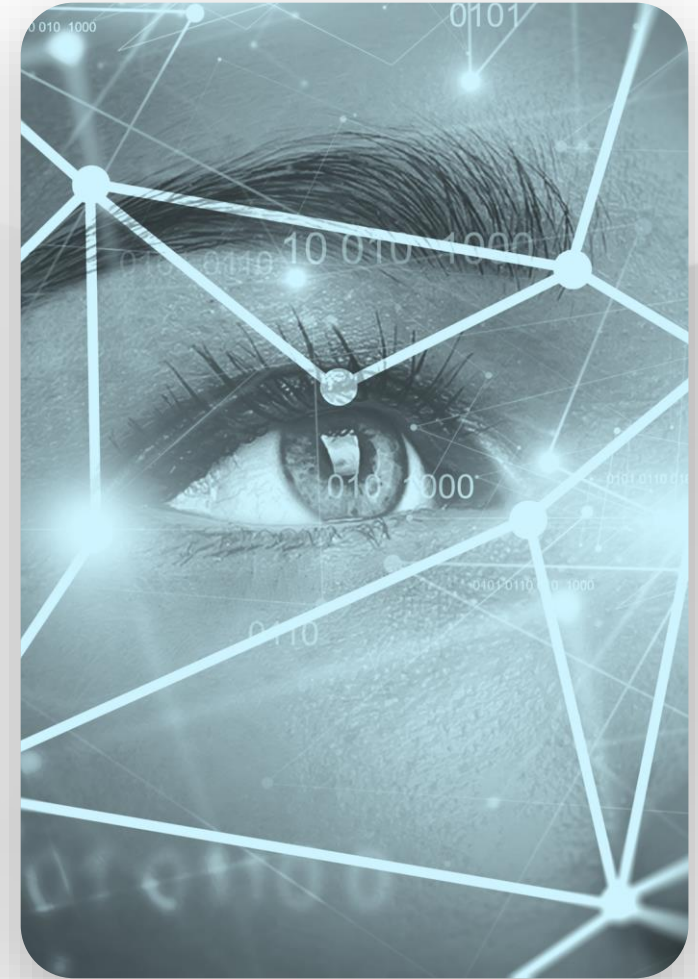


Leger use of **Cube AI** in Travel/Tourism

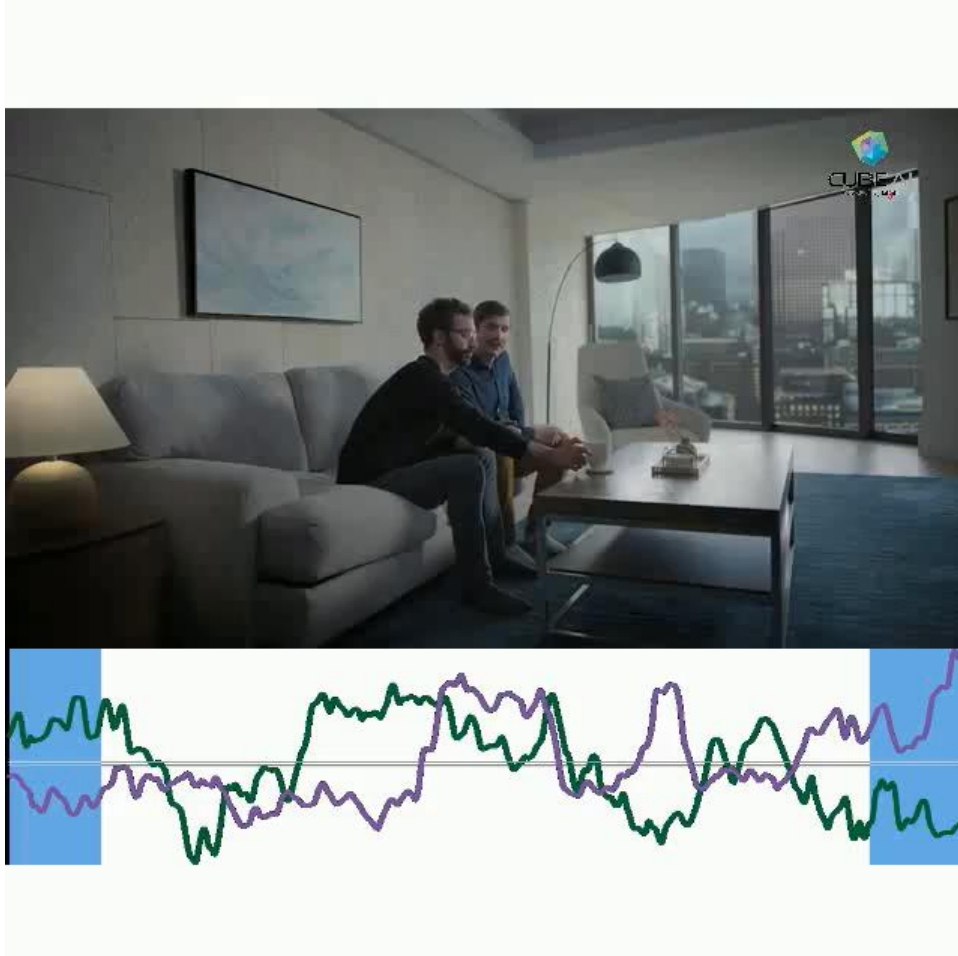
- Enhances **ad optimization** with AI-driven advertising test platform.

- Uses **biometric data** from viewers' eye and facial movements and pairs these results with traditional **survey data** and Leger's research **norms**.

- The result? **Faster** and **more accurate advertising decisions**, powered by AI.



Second by Second Analysis of Attention and Positive Emotion



1) Emotional Engagement

The WestJet ad starts with low emotional engagement but gains momentum, generating strong positive emotions in the middle and finishing on a high note of positive emotion, especially after the brand is shown, which is crucial for enhancing long-term memory recall.

2) Attention

Attention levels are low at the beginning of the ad but increase once we start to see the sand. However, there is a significant drop at the end, when the man gets up from the sofa. This indicates an area for improvement in capturing the audience's attention and leaving them with a lasting message.

3) Recency Optimization

The final moment of the viewing corresponds to a drop in viewer attention but leaves viewers with a positive emotion. These final moments are crucial to overall brand opinion and recall. We suggest reviewing the ending to maintain a higher level of attention, which will enhance ad performance.

Ad Diagnostics: Normative Comparisons

(Among Those Not Seen Ad Previously)

- The West Jet ad has a higher brand link, message articulation and lower wear out than Leger’s norm.
- Conversely, the ad performs lower than those in our database on brand impact, call to action, relevance, and social medial shareability.
- Brand impact and call to action score the lowest compared to Leger’s norms, highlighting areas where the ad could be improved. The ad may benefit from a creative revamp to strengthen brand appeal and improve action.

	WESTJET		CUBE AI <small>Powered by Leger</small>	Differential
Brand link	50%	↑	40%	+11
Message articulation	38%	↑	31%	+7
Enjoyment	26%		23%	+3
Attention	23%		25%	-2
Brand Impact	14%	↓	17%	-3
Relevance	14%	↓	13%	+1
Choose over competitors	10%		11%	-1
Call to action	9%	↓	10%	-1
Social media shareability	9%	↓	9%	0
AVERAGE	21%		19%	+2
Wear-out*	17%	↑	16%	+1

Thinking about this ad, how much do you agree or disagree with each of the following?

Base: Those haven't seen the ad previously (n= 234)

*Strongly disagree is shown for wear-out

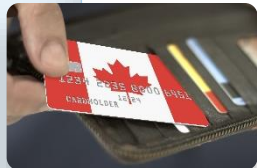
↑ Higher than norm

↓ Lower than norm

Overall Conclusions



Economic confidence in Canada is at an all-time low, and economic uncertainty with the tariffs will only add to that. This is bound to affect discretionary spending, including travel.



Canadian patriotism is at an all-time high, bound by the dislike of Trump, fear of tariffs, and the motivation to 'fight back' with their wallets with American boycotts.



Despite economic headwinds and consumer economic pessimism, consumer sentiment towards travel is still riding the post-Covid wave and is seemingly an untouchable category for consumers to cut back on.



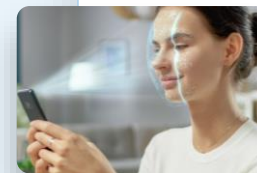
Since the tariffs went through as planned and Trump continues to escalate his anti-Canadian rhetoric, consumers will make massive changes to their spending patterns by switching U.S. travel for domestic travel.



While AI is well-established in many facets of our lives in Canada—the travel category has lagged, and it is still in the early adoption phase.



Travel organizations that incorporate or encourage AI in their guest experience/travel planning behaviour will win.



Organizations that can utilize AI tools like Cube AI can gain distinct advantages in creating consumer-facing materials that tug on human emotions.

Contact Us

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Leger

Data-driven intelligence for a changing world.

leger360.com