

LGBTQ2 Travel Study

Prepared for:
Tourism HR Canada
Canada's LGBT+ Chamber of Commerce

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Section 1

Overview

Objectives and
methodology



Objectives

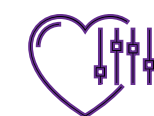
The CGLCC – Canada’s LGBT+ Chamber of Commerce, in partnership with Travel Gay Canada conducted three surveys in 2007, 2010 and 2014 to examine travel behaviours and preferences of the LGBTQ2 population.

The Chamber, along with Tourism HR Canada are seeking to update this research, and specifically focus on unearthing trends, behaviours, preferences and motivators for **Canadian LGBTQ2 travellers.**



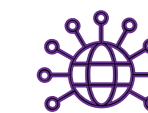
Focus on Canadian LGBTQ2 leisure travellers

Understand travel trends and preferences of the part of the Canadian population that identify as LGBT+ **and** traveled at least once for leisure over the past year.



Travel motivators

Examine Canadian LGBTQ2 community’s motivations underlying their travel choices.



Travel preferences

Highlight Canadian LGBTQ2 travellers’ preferences while making travel decisions.



Travel choices and behaviors

Understand Canadian LGBTQ2 travellers’ choices and behaviours while traveling to their preferred destinations.



Methodology

The **survey instrument** was designed in collaboration with the Chamber. To the extent possible, we retained questions from previous surveys to enable comparison over time.

Seeing as the objective of the survey was to query Canadian LGBTQ2 population that also travels for leisure, the survey had three qualifying criteria – respondents had to be over 18, had to self-identify as being a part of the LGBTQ2 community, and indicate that they had travelled at least once for leisure over the past year.

The survey was composed of 46 questions (including demographic indicators), and was available in both, English and French. Respondents were provided with a standard

definition of leisure travel, which preceded almost every question in the survey. The survey was fielded by Leger to their online panel between **March 5 and March 22, 2020**. We gathered a total of **1,455 complete and valid responses**.

Extrapolations of certain data points to the entire Canadian LGBTQ2 population is based on an assumption that 5.8% of the Canadian population identifies as being a part of the LGBTQ2 community. This assumption is based on an average of wide-ranging estimates currently available about the representation of the LGBTQ2 population in Canada.

The appendix provides additional methodological details.

Section 2

Highlights

Major themes and insights
from the Study



Canadian LGBTQ2 travellers potentially spend over \$12 billion in tourism activities annually

\$12.3B

Estimated LGBTQ2
leisure travel spend
potential

\$1,855

Average spend per
trip

A 43% increase since 2014

An average Canadian LGBTQ2 traveller went on three leisure trips over the past year and spent a little less than \$1,900 per trip, inclusive of travel, activities, and accommodation. The Canadian population in general, spent over \$83 billion on their leisure trips in 2018.**

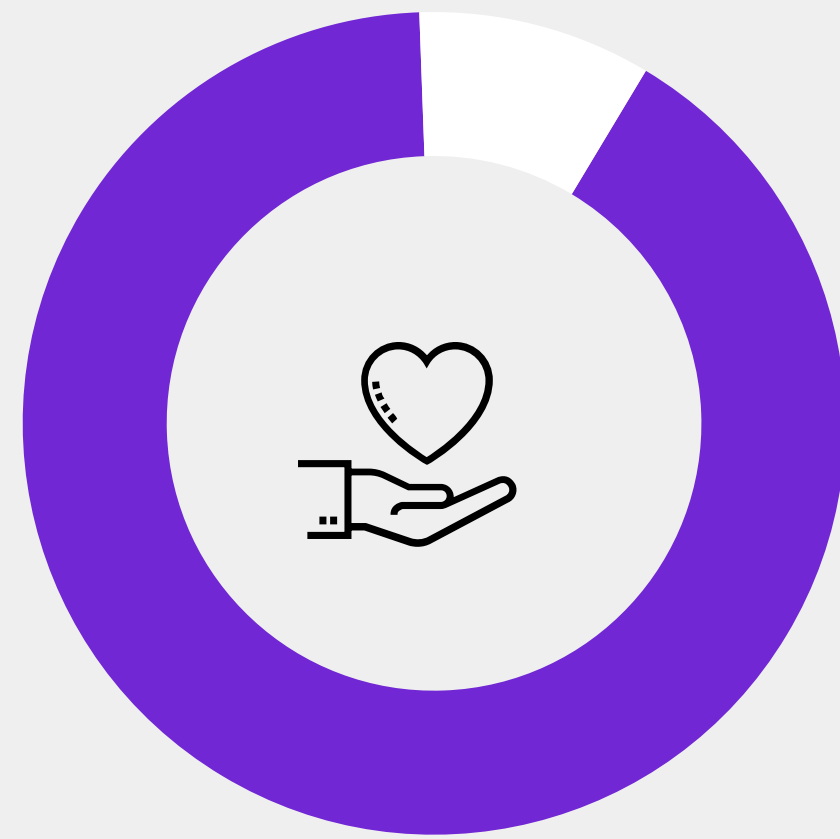
42% of high-income earners* spent over \$2,000 per leisure trip, with 7% spending over \$5,000

Individuals that travel outside of Canada spend on average \$3480 per trip

* High-income earners defined as those with a household income of over \$100,000.

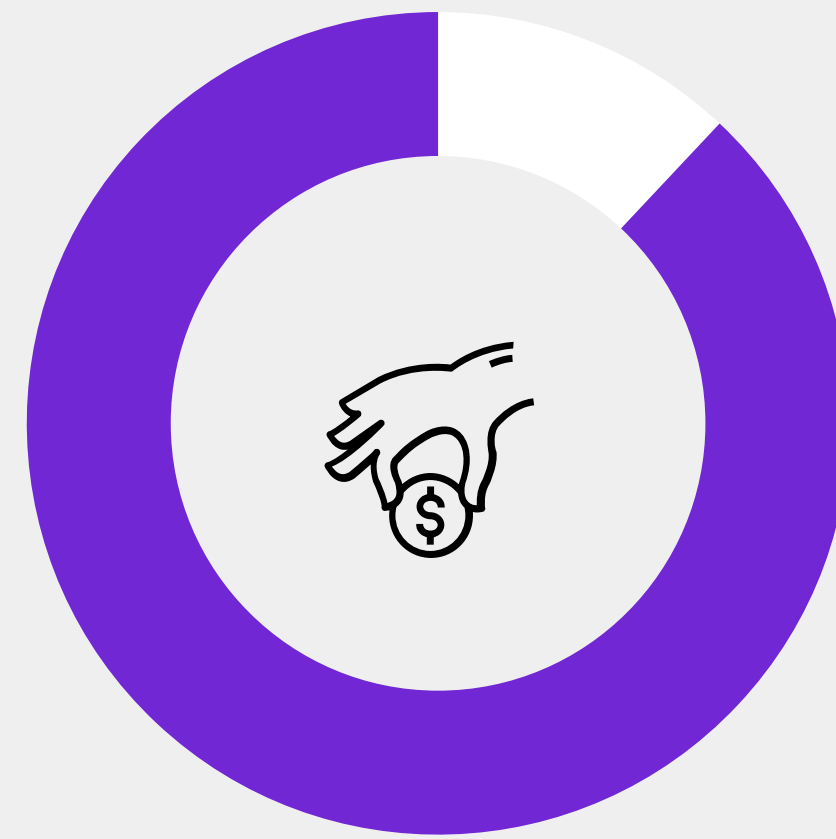
** Sourced from Statistics Canada's National Travel Survey, 2018.

Safety and cost are key factors for majority of the travellers when planning their leisure trips



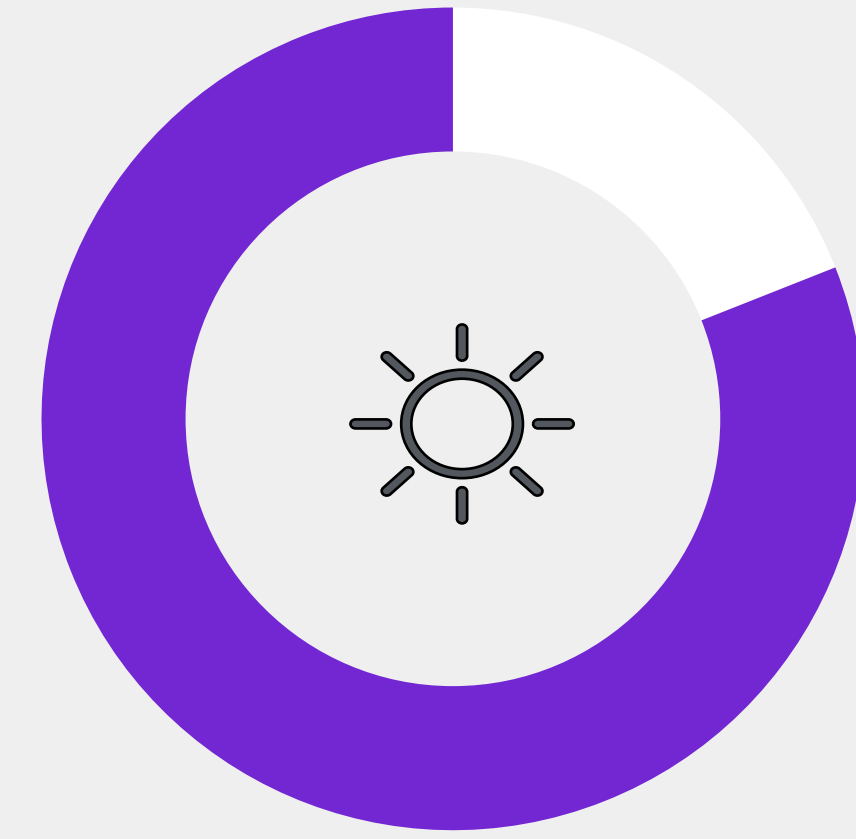
89%

value safety when choosing a travel destination.



88%

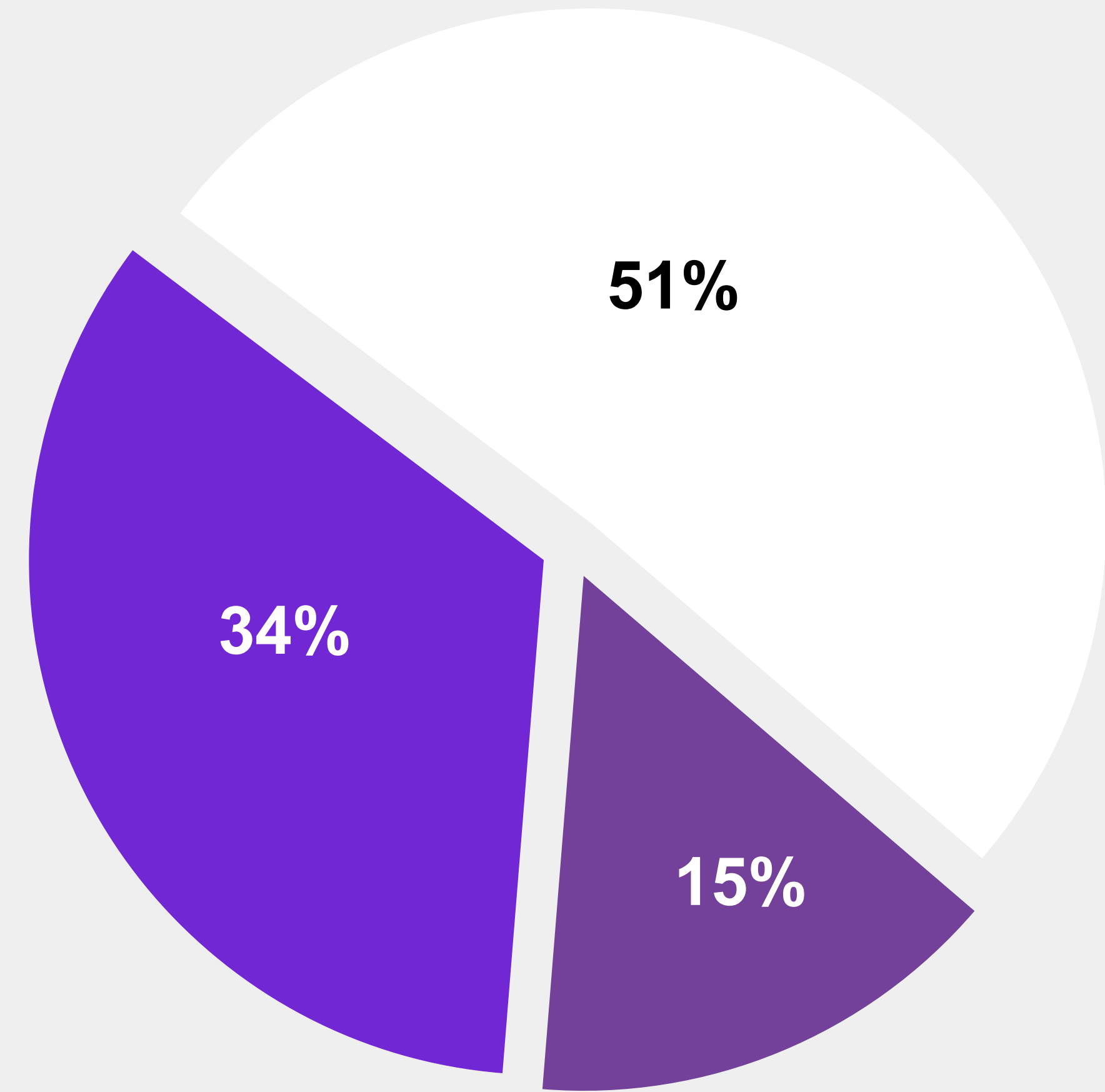
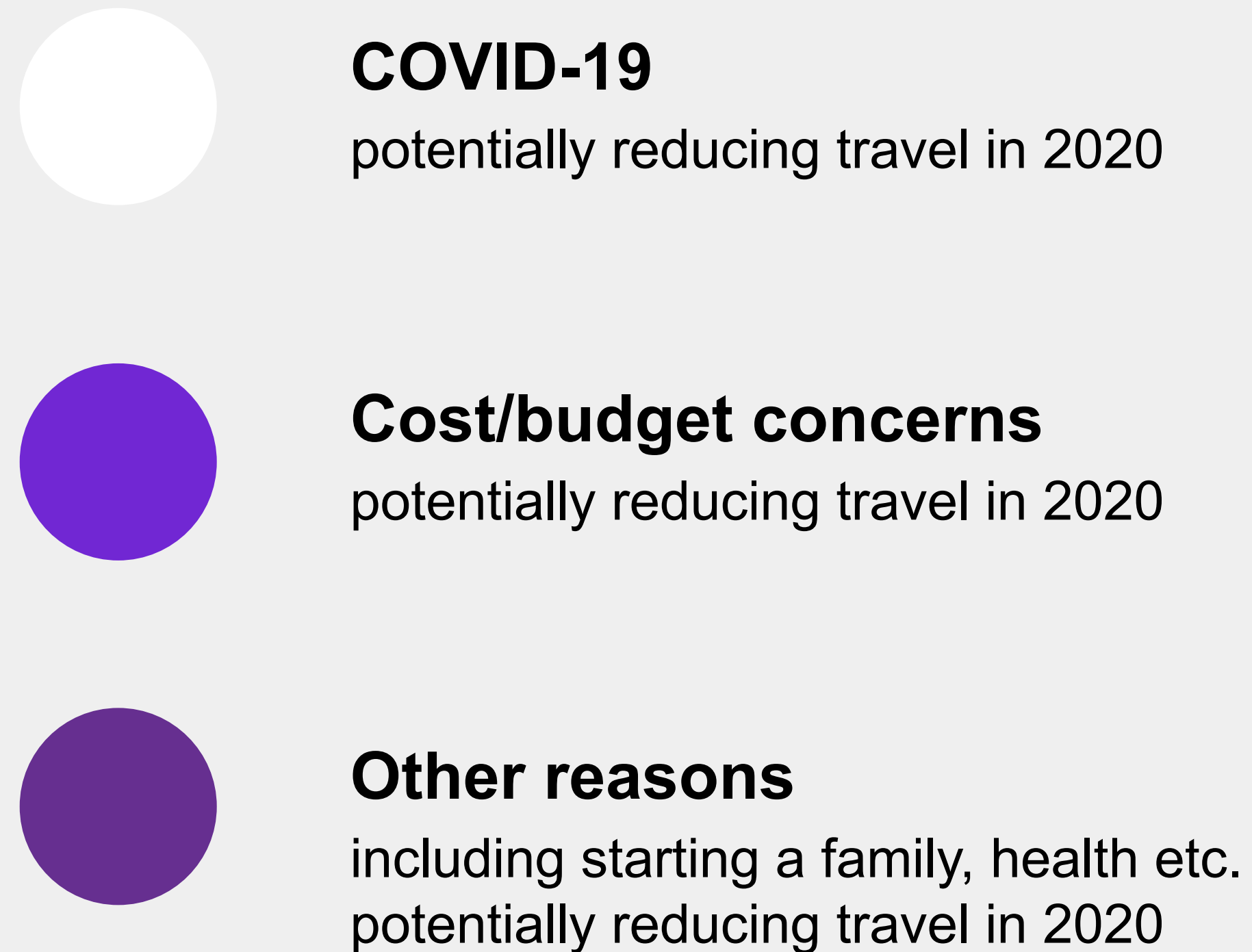
state that cost/value for money is an important factor when choosing a travel destination.



81%

consider climate to be an important factor when choosing a travel destination.

COVID-19 pandemic appears to be driving concerns around leisure travel intentions in 2020*



* Overall, 34% expect their leisure travel to decrease in 2020. This slide provides a breakdown of reasons for this segment of respondents.

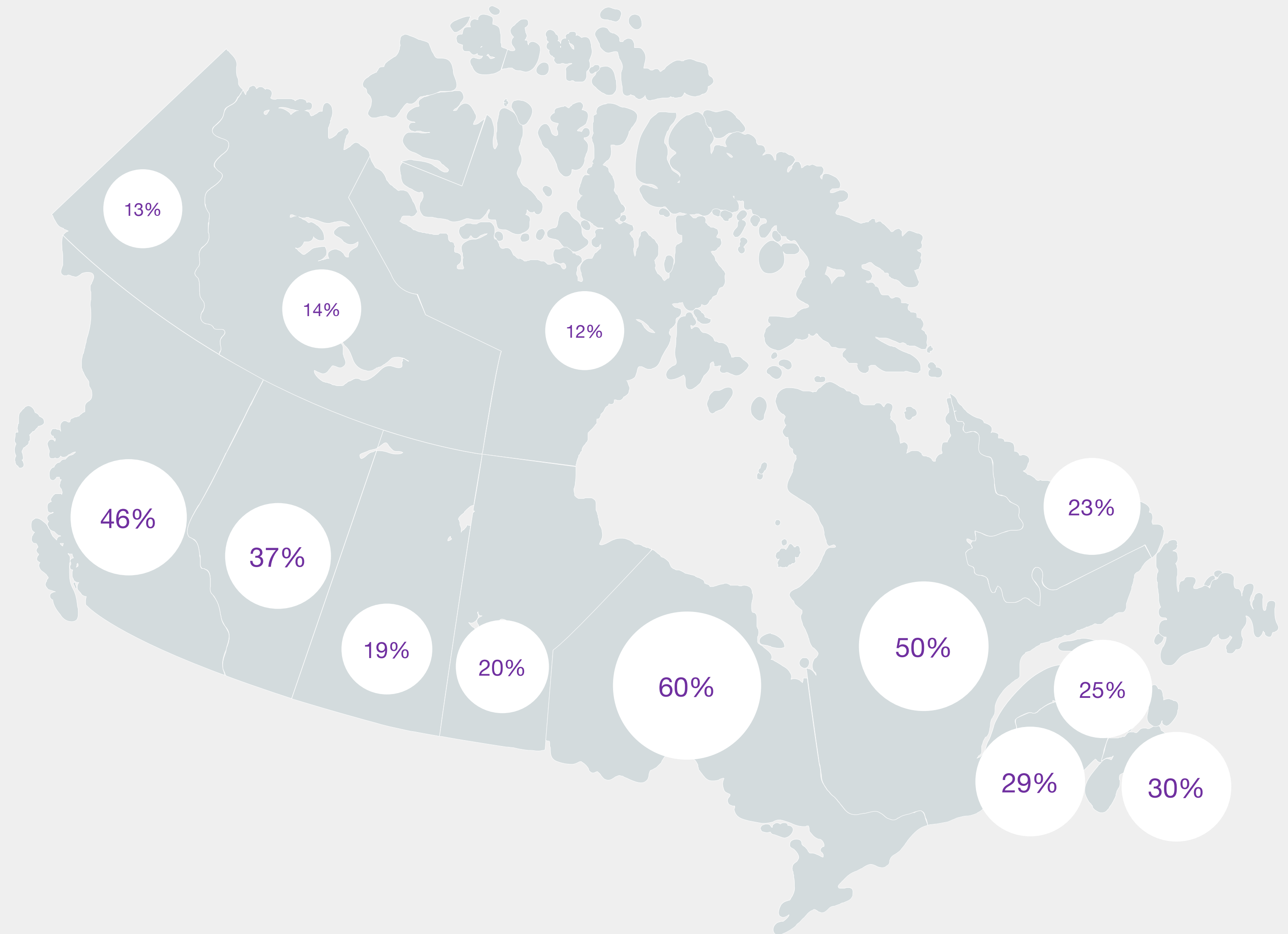
Over 90% intend to travel to Canadian destinations in 2020

Ontario

With over 33% stating that they will very likely travel to Ontario, it remains a popular choice. Ontarians and Quebecers are the most likely to travel to destinations within Ontario.

Quebec

Quebec is the second-most popular province for leisure travel in 2020, especially for Ontarians, Quebecers and those living in the Maritimes.



Section 3

Insights

- Archetypes
- General trends
- Location preferences
- Booking and activities

Metropolitan foodies

Food and dining related activities are the most engaged with during leisure trips.

Prefer to plan trips to major metropolitan cities, with 82% planning at least one trip to a city annually, and 19% planning three or more a year.

33% of this group spends more than \$2,000 per leisure trip, 5% higher than the average LGBTQ2 traveler.

42% of those that view and dining activities as very important are women, whereas 36% are men.

56% of travellers report engaging in food and dining related activities during leisure trips.



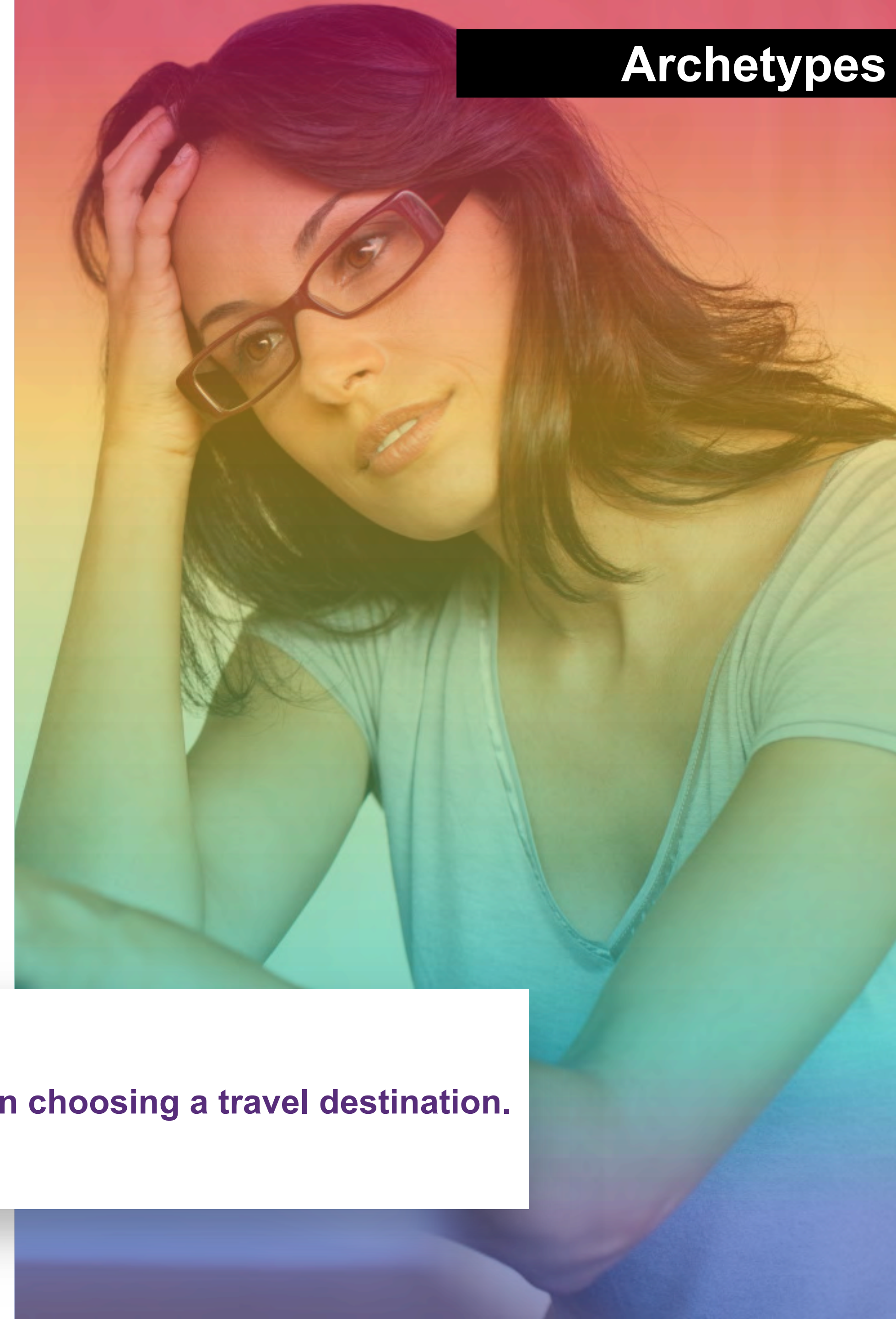
Safety conscious travellers

Safety is the most important factor when choosing a travel destination. **45% of this group that values safety are women**, whereas 38% are men.

An important factor in deciding travel for all sexual identities, with over 60% of bisexual, gay, and lesbian travelers identifying safety as a very important factor.

An important factor regardless of age, with at least 53% of each age bracket viewing safety as very important.

59% of the population view safety as a very important factor when choosing a travel destination.



Practical lodging travellers

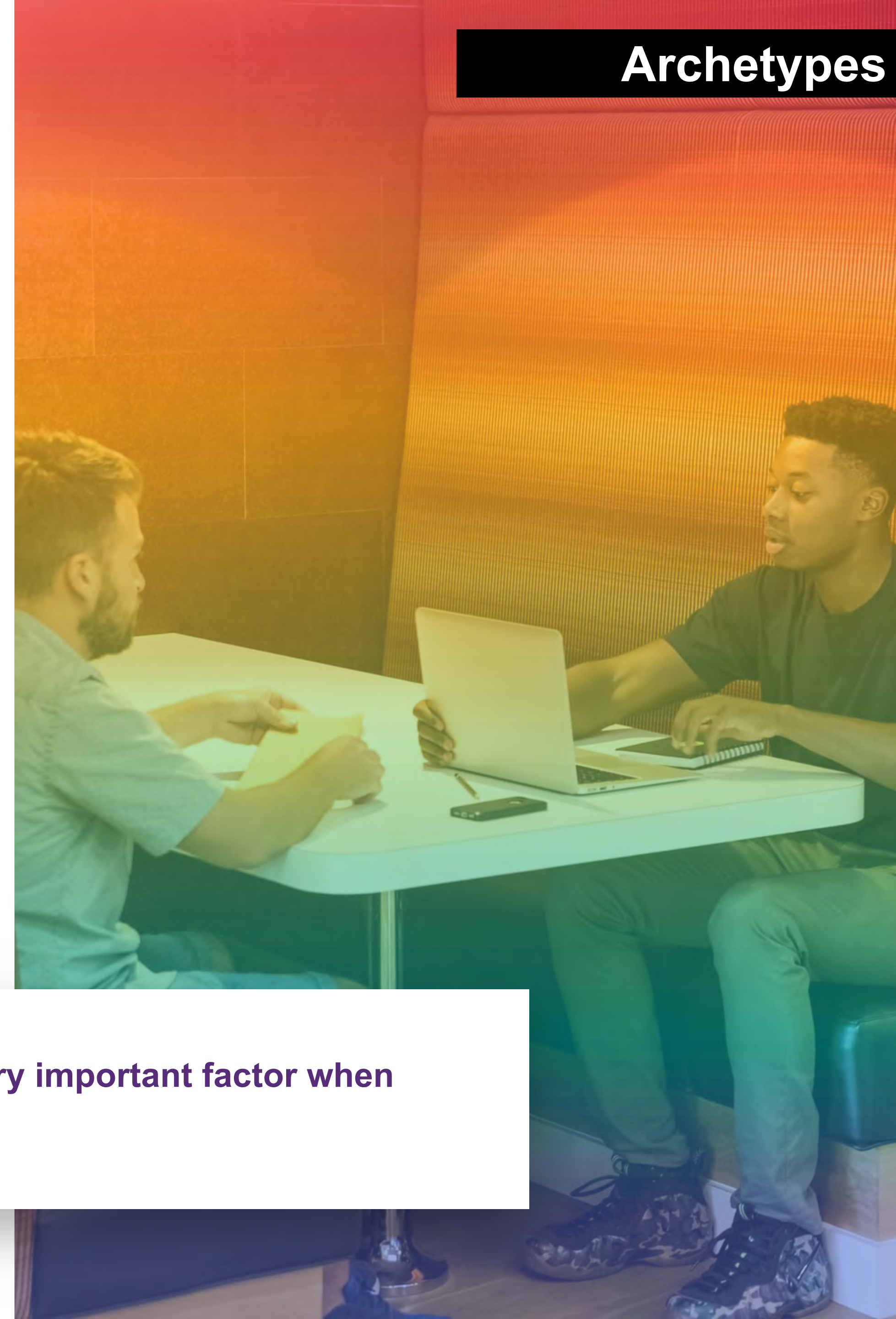
Cost and minimizing expenditure is the most important factor when planning leisure trip accommodations.

This group is more likely to be budget travelers, with 37% of this group spending less than \$1,000 per trip.

Women are more likely to view cost and minimizing expenditure as very important, with 46% of this group being women and 33% being men.

24% of this population will always stay at family or friend's homes during their leisure trips, and 20% always staying at hotel chains.

46% of individuals view cost and minimizing expenditure as a very important factor when choosing leisure travel accommodations.



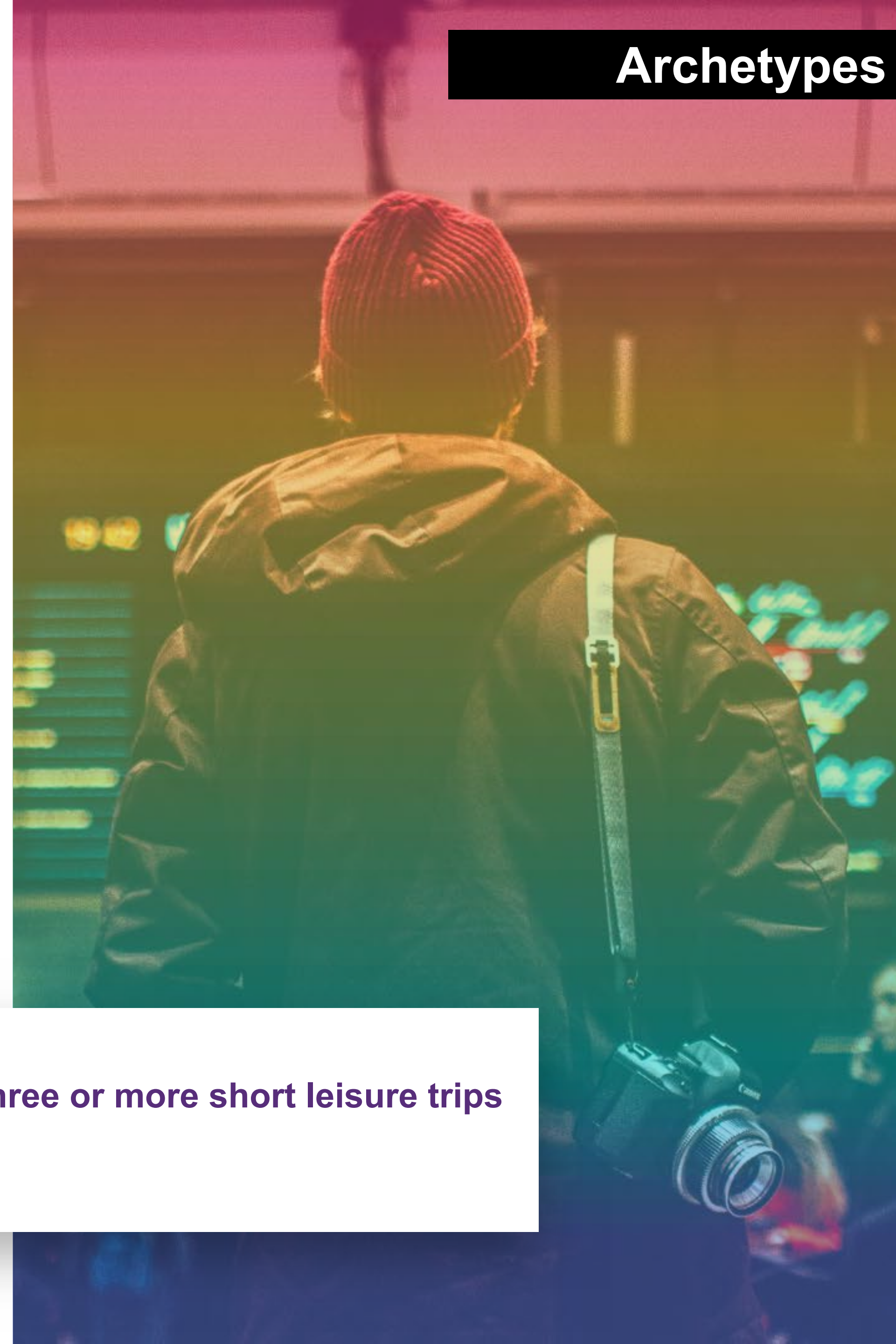
Frequent travellers

These individuals are Likely to travel within Canada - **33% of the population went on 3 or more trips in Canada** over the last year.

A third use their car for leisure trips.

42% of this population spends less than \$1,000 per trip, with 79% spending under \$2,000 per trip.

This archetype is driven by the **34% of the individuals that take three or more short leisure trips per year**



Value travellers

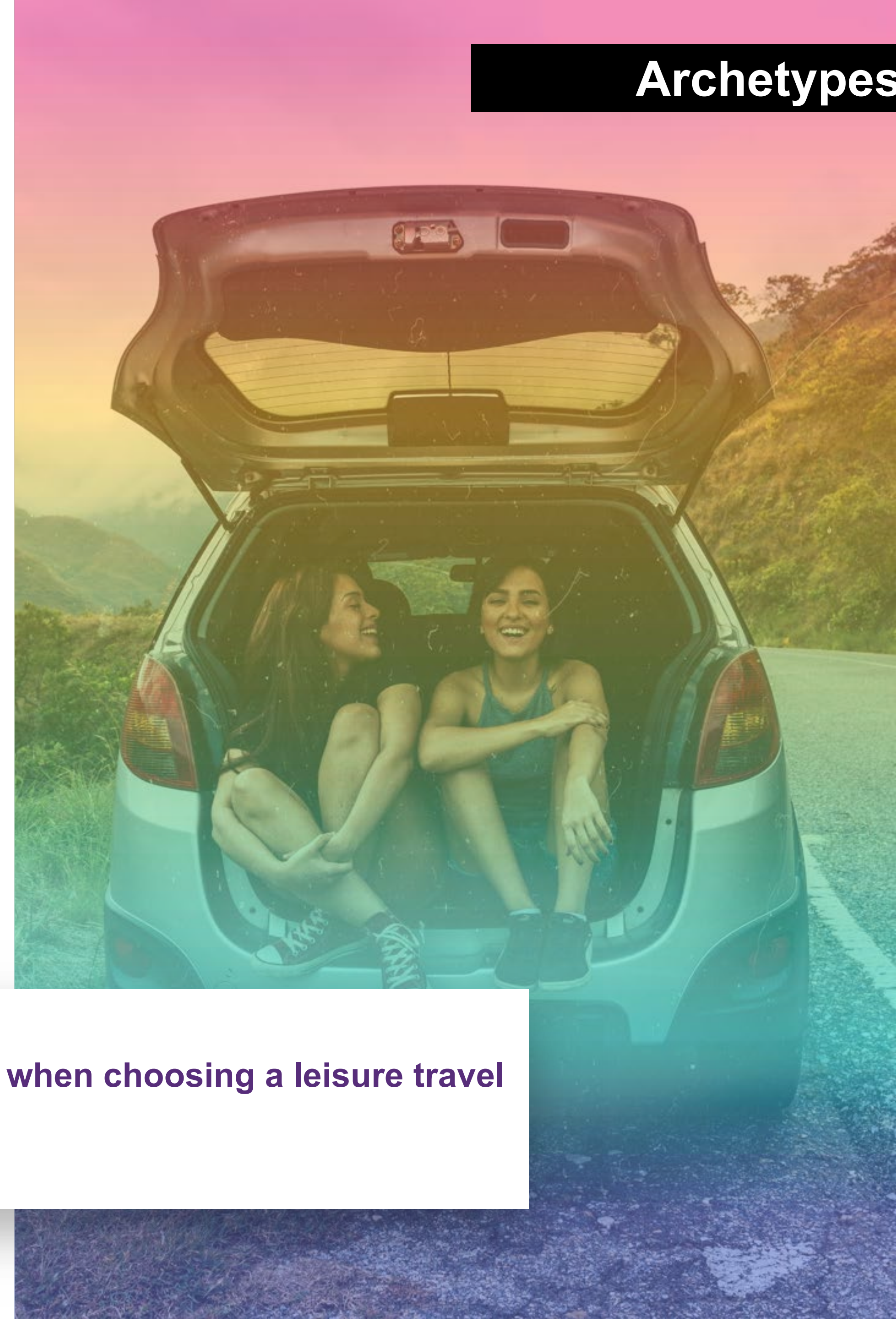
These individuals prefer booking leisure trips to destinations and choosing accommodations that offer good value for money rather than following recommendations from friends and family.

32% of millennial travellers (aged 26-35) value going on trips that do not require large budgets.

53% of the population maximizes long-term savings by staying at specific hotel chains for loyalty membership points rather than local accommodations or Airbnb

33% spend less than \$1,000 per trip.

46% of travellers view cost minimizing as a very important factor when choosing a leisure travel destination.



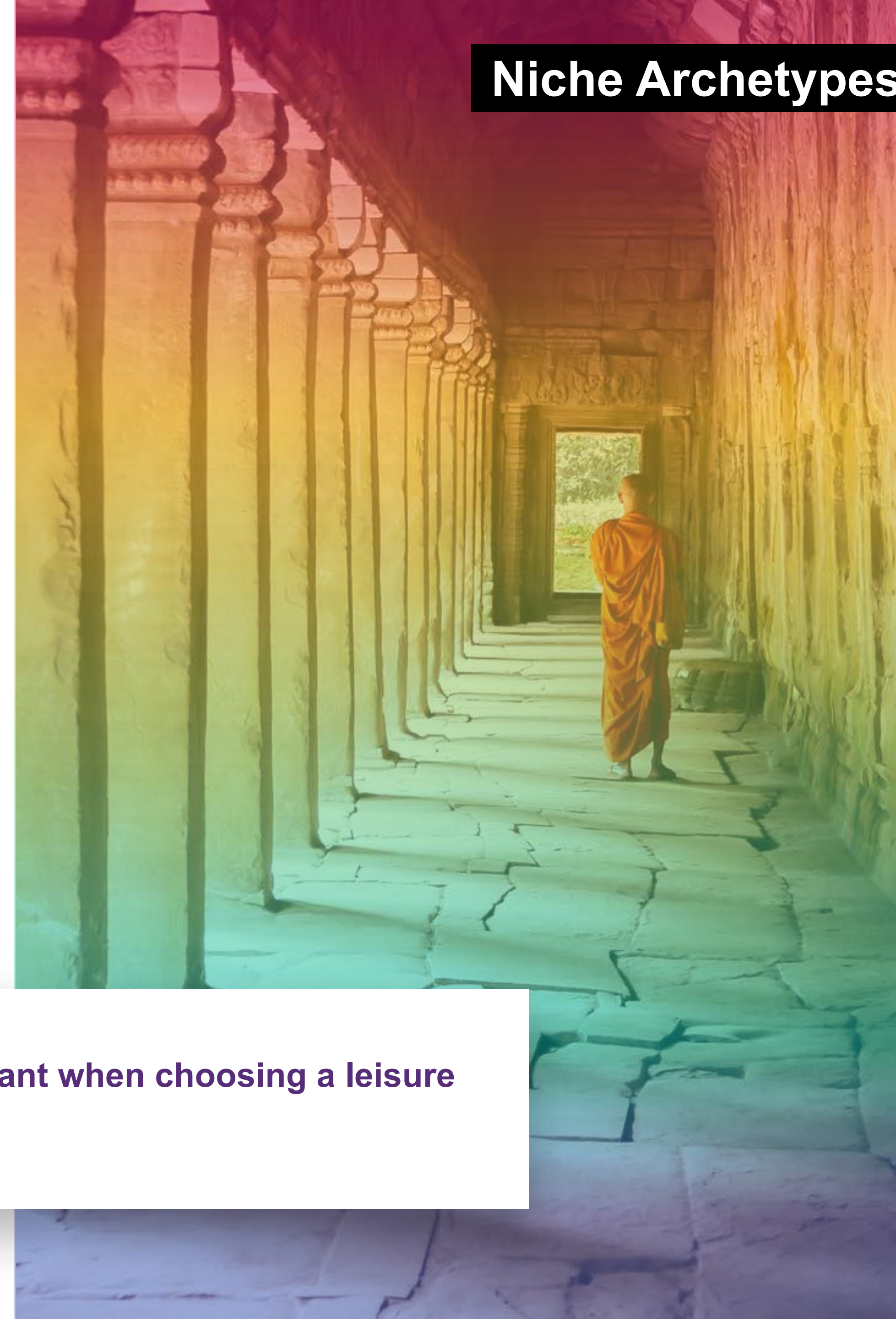
Cultural explorers

These individuals prefer planning trips to explore different locations and cultures rather than to destress and relax.

They have a strong preference **towards exploring destinations with LGBTQ2 history and culture.**

This archetype aligns with individuals that engage in arts & culture activities, attend festivals, or LGBTQ2 events at their travel destinations.

34% of these individuals find LGBTQ2 history and culture important when choosing a leisure travel destination.



Influencer-driven travellers

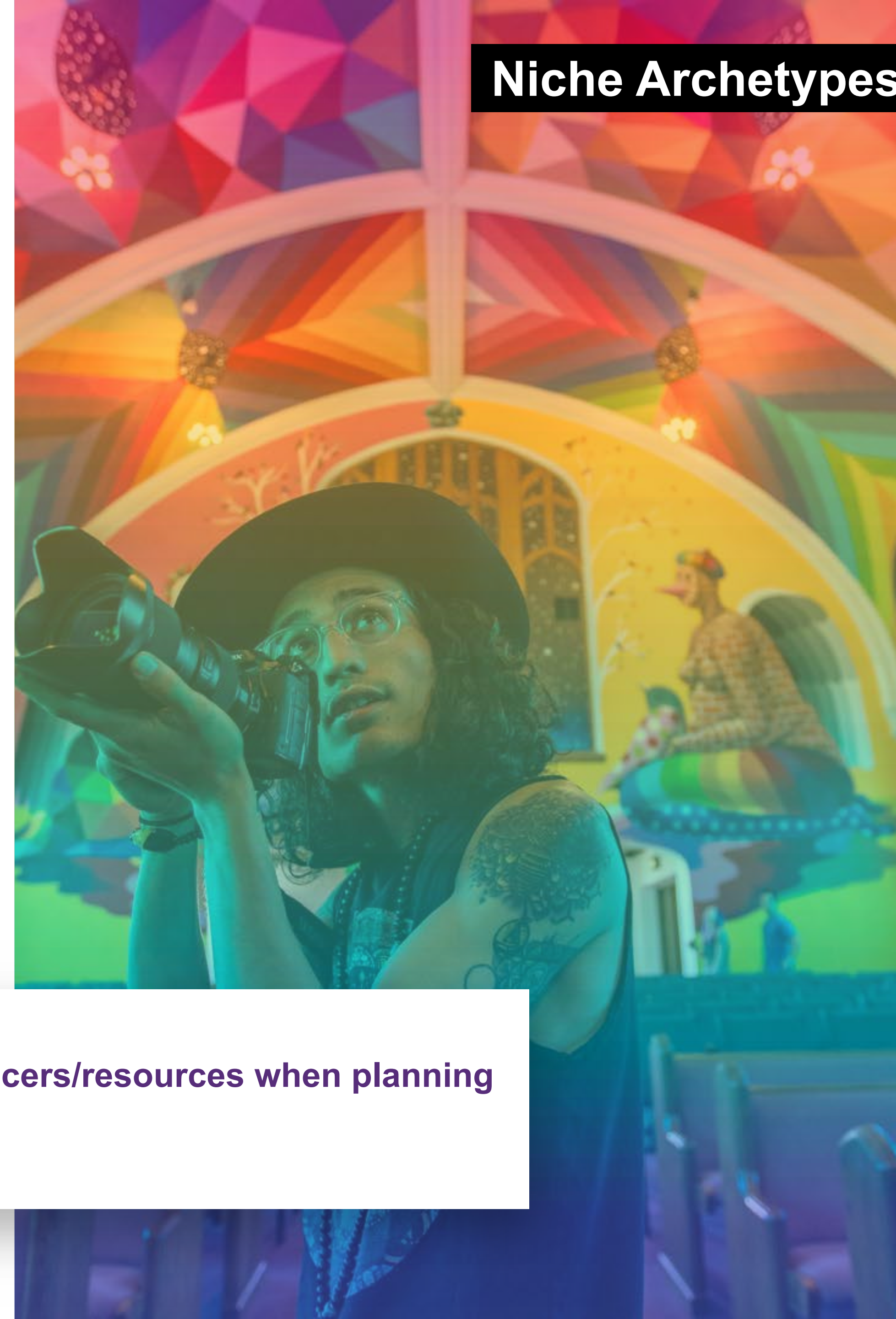
These individuals refer to travel forums, blogs, or Instagram influencers when planning a leisure trip.

Prefer to plan a trip six months in advance rather than starting to plan a trip two weeks prior.

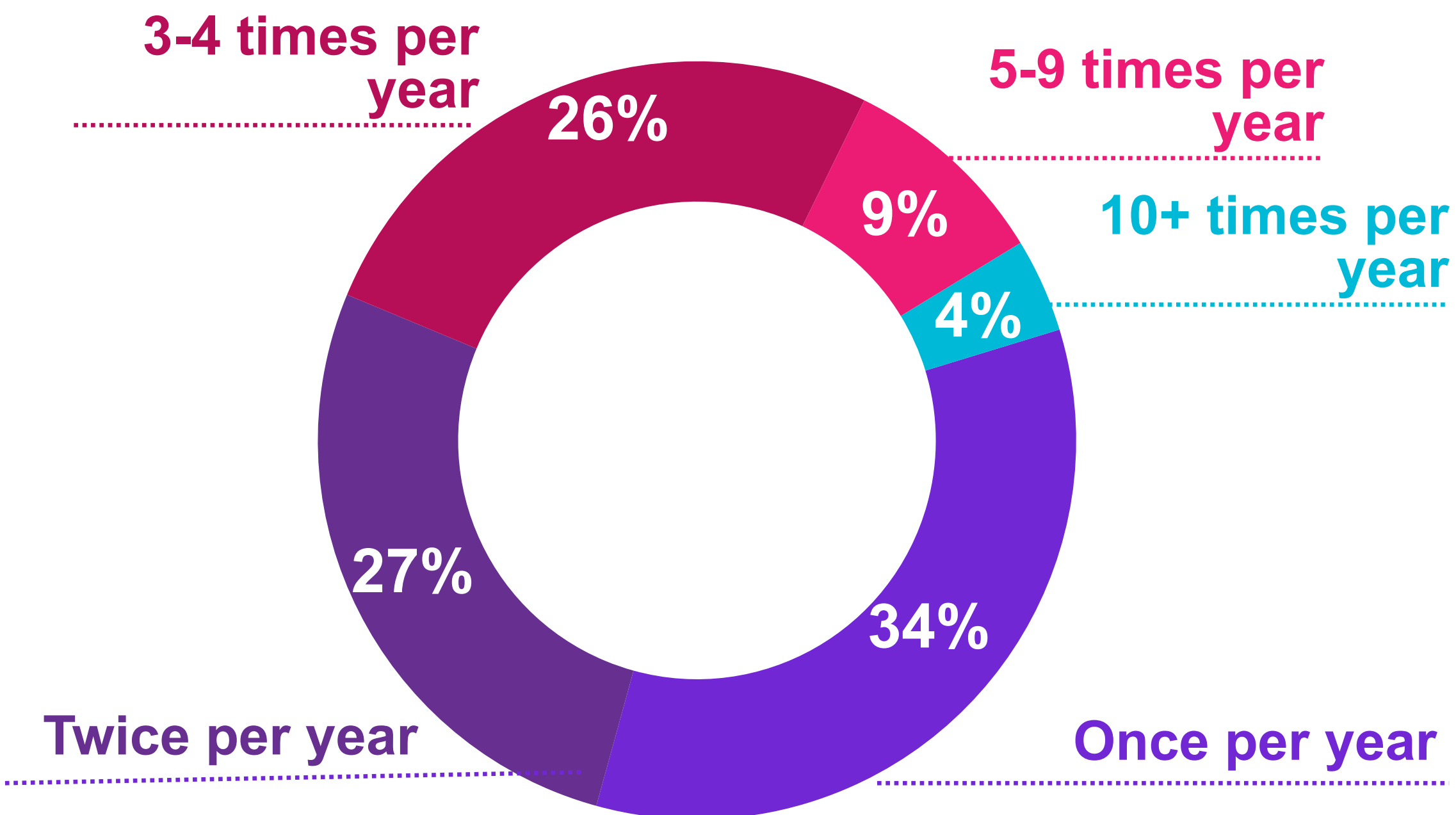
37% of the population view reviews and ratings as very important when booking leisure accommodations.

11% consider reviews on LGBTQ2 travel sites as very important when planning.

26% of these individuals take cues from LGBTQ2 specific influencers/resources when planning a trip .



Over half take at least two leisure trips per year



Survey question: On average, how often do you travel for leisure every year?

1

Geographical trend

British Columbians and Albertans are most likely to travel for leisure at least two times per year (**over 30%**).

2

Income trend

32% of high-income earners travel at least three to four times a year.

3

Generational trend

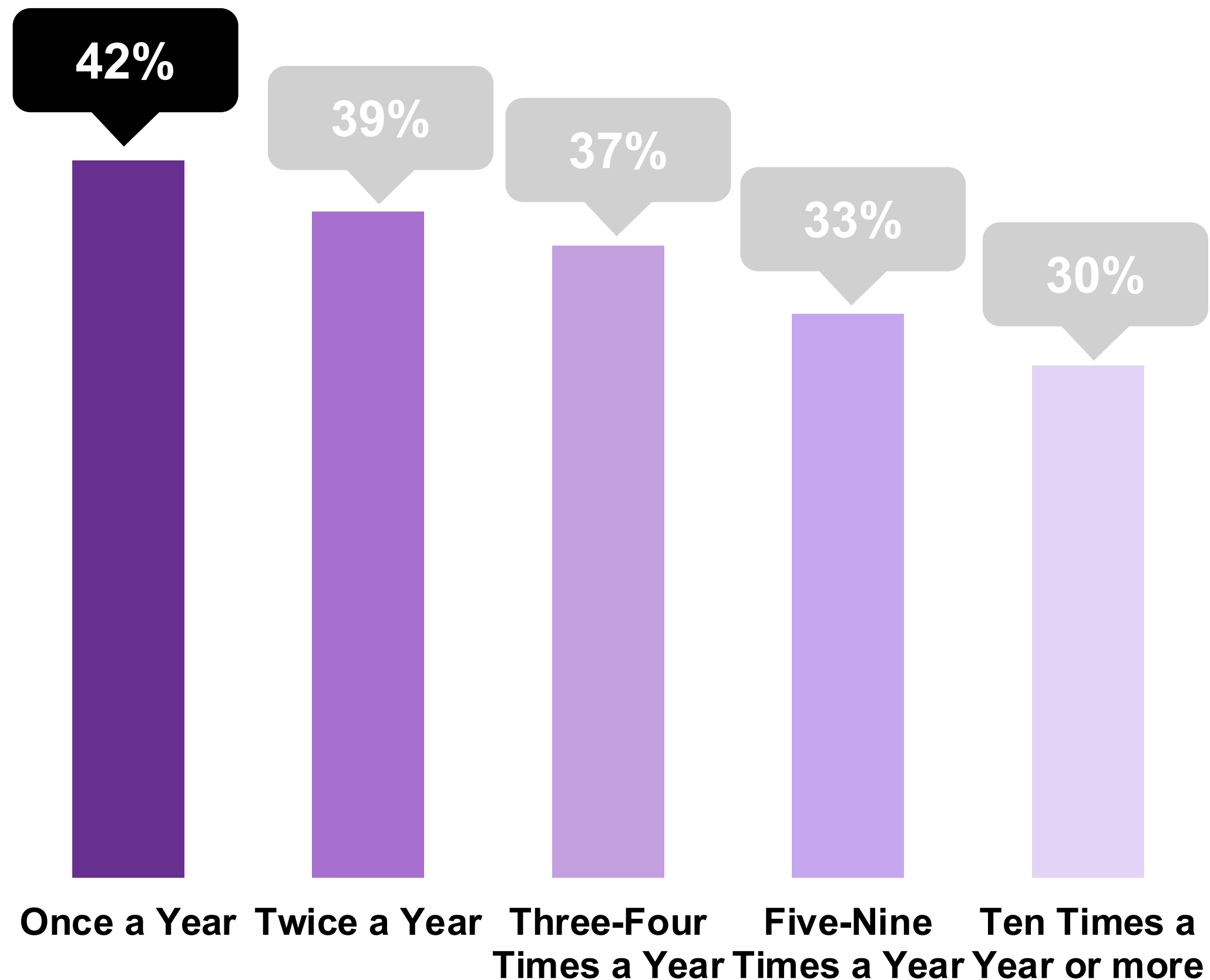
Gen X and baby boomers are more likely than other age groups to make more than **three leisure trips per year (50%)**.

4

Sexuality trend

46% of the respondents that sexually identified themselves as being gay indicated that they travel more than three times a year

There appears to be a correlation between trip frequency and mode of travel



Survey question: On average, how often do you travel for leisure every year? | On average, how often do you use these different modes of transport for leisure trips?

1

Commercial airlines

As displayed in this bar chart, individuals that make fewer leisure trips tend to prefer flying to and from their destinations via commercial airlines. One potential hypothesis around this correlation could center around the need to save time while getting to and from travel destinations – especially when individuals take fewer leisure trips on average.

2

Generational trend

Nearly half of those between 26 and 35 always prefer getting to and from their travel destinations via commercial plane.

3

Sexuality trend

49% of respondents that sexually identified themselves as being gay stated that they always take commercial airlines. 22% of respondents that identified themselves as being lesbian stated that they never take commercial airlines.

A majority of LGBTQ2 travellers take at least one week-long to 10-day trip

Number of Trips	Short Trips (5 Days or Less)	Medium Trips (6 to 10 Days)	Long Trips (11 Days or more)
None*	12%	24%	42%
Once or Twice	55%	67%	51%
Three Times or More	34%	9%	7%
	100%	100%	100%

* Respondents had to indicate how many of each type of trip (short, medium, long) they take on average annually. For instance, individuals that may have chosen none for short trips have chosen options other than none for medium and long trips.

Survey question: On average, how often do you take the following types of leisure trips every year?

1

Geographical trend

British Columbians are most likely to take at least one short trip per year, while Albertans are most likely to take one medium-length trip per year. Those living in the Maritime provinces are least likely to take medium-sized trips every year.

2

Income trend

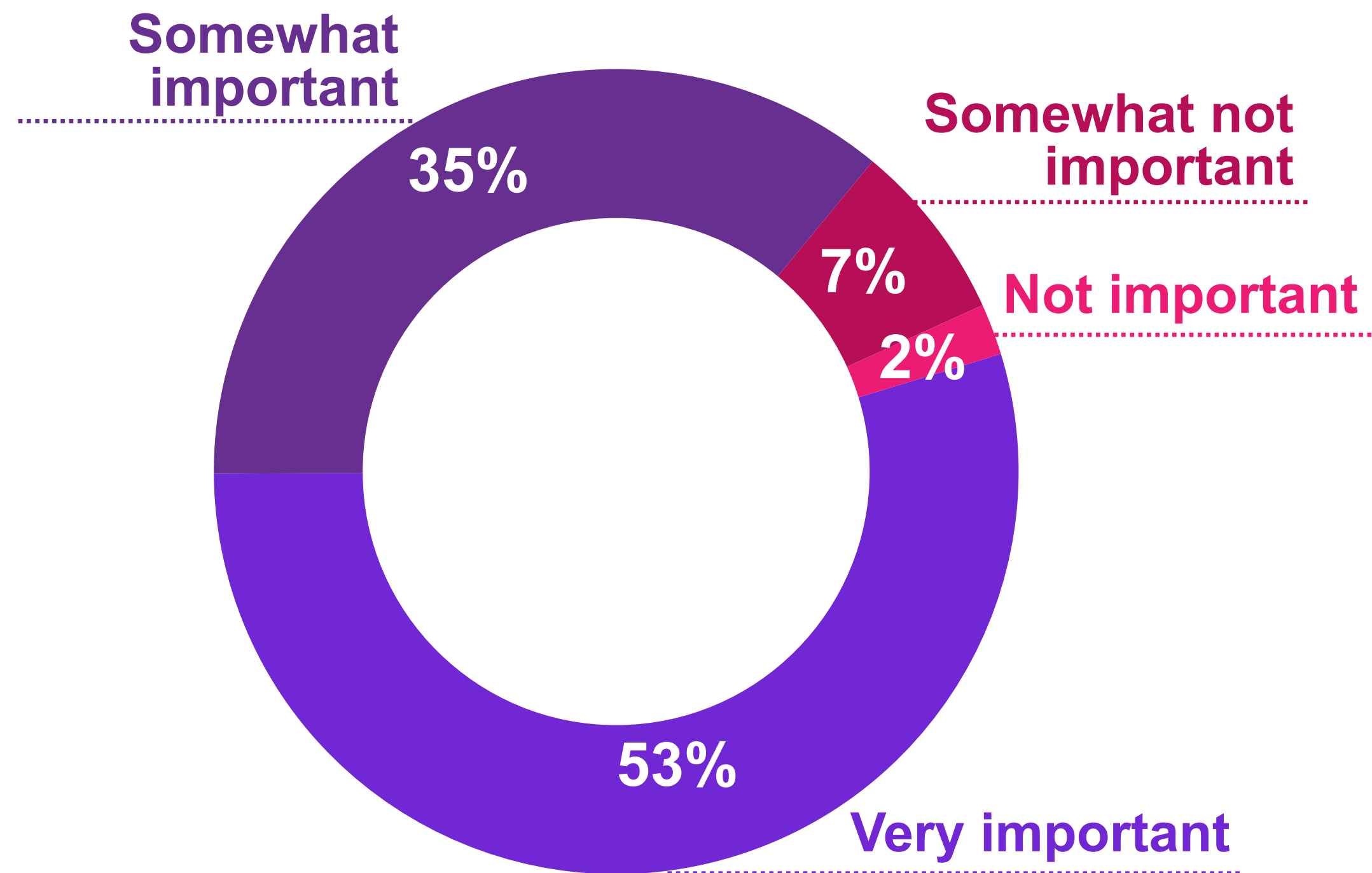
High-income earners are most likely to take at least one long trip per year. Whereas those with annual household incomes of less than \$100,000 are most likely to take one or two short trips per year.

3

Sexuality trend

45% of respondents sexually identifying as lesbian indicated that they take 3-4 short trips per year. 23% of respondents sexually identifying as gay indicated that they go on two medium-length leisure trips every year.

Value for money is one of the most important considerations when choosing a destination



Survey question: When choosing a travel destination, how important are the following factors? (Cost/Value for Money)

1

Cost is a very important consideration for:

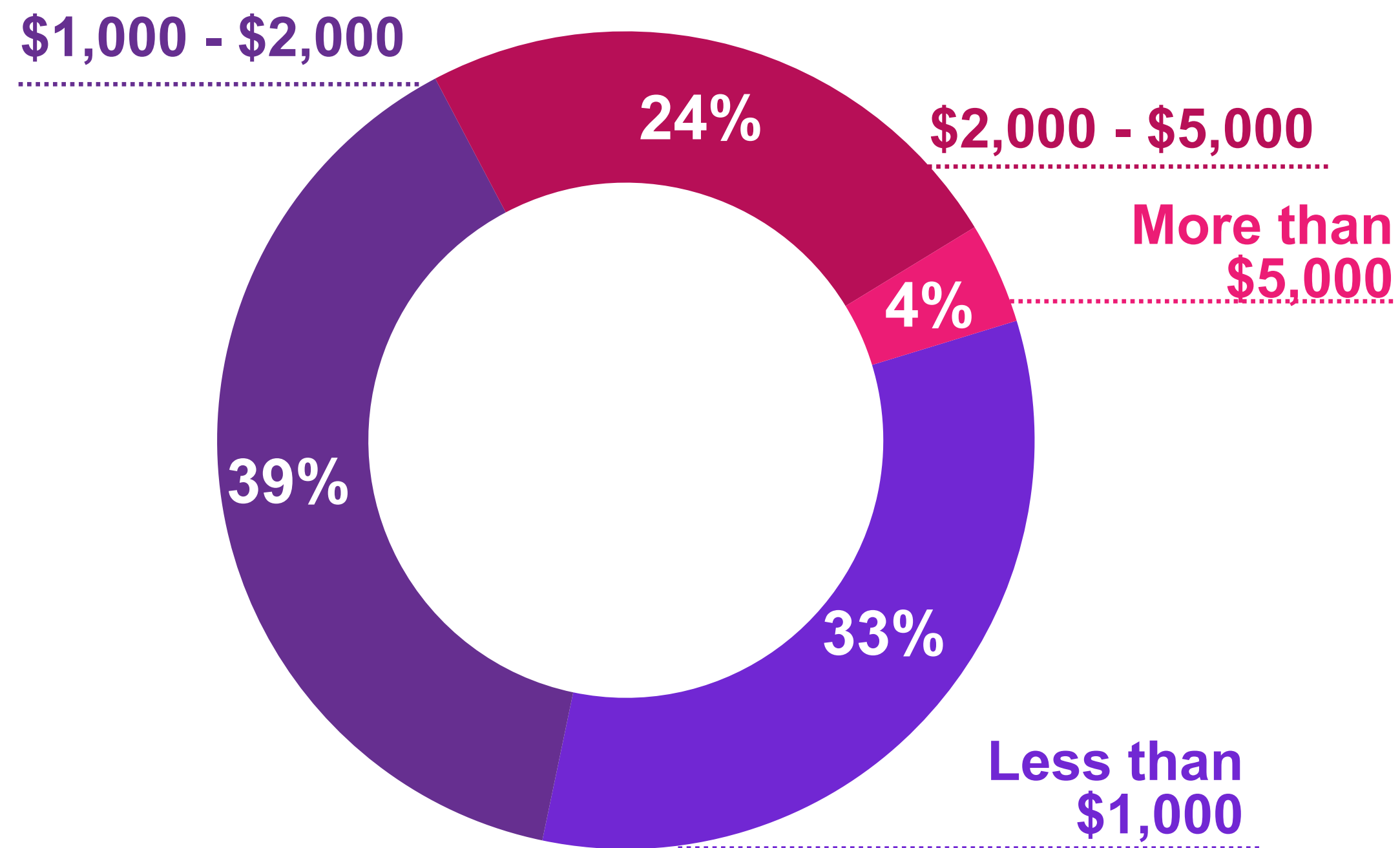
- 62% of those in Maritimes provinces
- 60% of those earning lower than \$50,000 per year
- 58% of Gen Z and younger millennials (18 to 25)
- 55% of those earning between \$50,000 and \$100,000 per year

2

Cost is not an important consideration for:

- 16% of baby boomers (65+)
- 15% of those with a post-graduate degree
- 14% of high-income earners
- 13% of Gen Xers (36-45 years)
- 12% of individuals married

Over 70% of individuals spend on average, less than \$2,000 per trip



Survey question: On average, how much do you spend on individual leisure travel trip?

1

Individuals likely to spend less than \$2,000 per leisure trip:

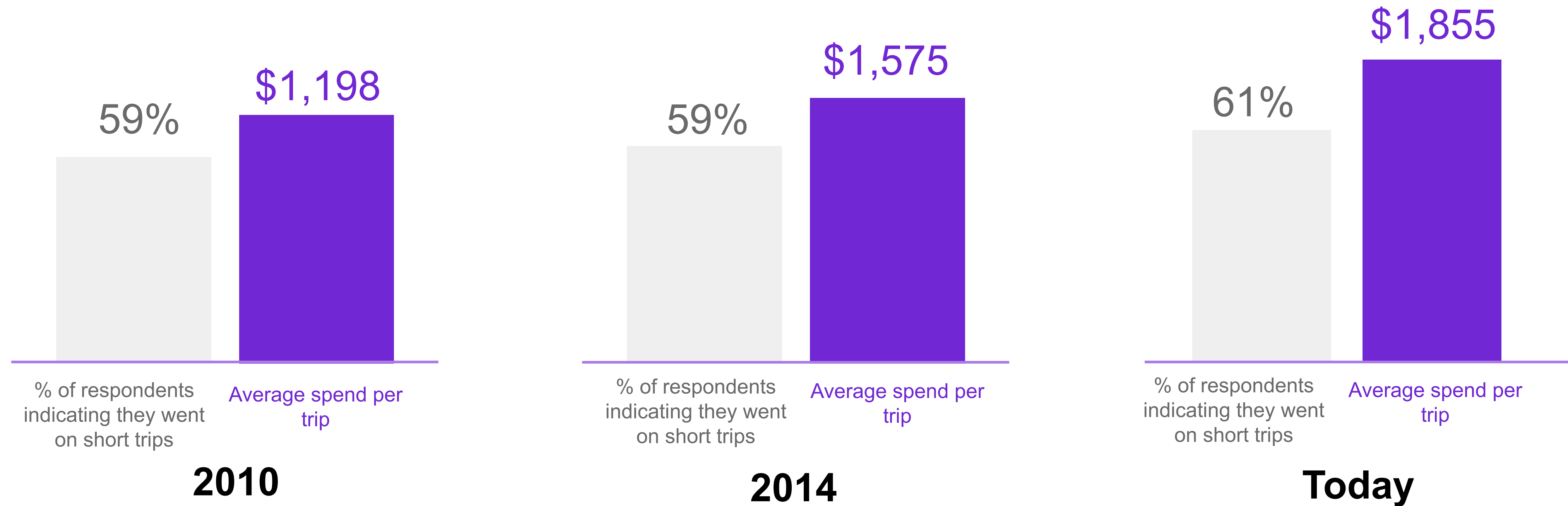
- 81% of Gen Z and millennials (18 to 25 years of age)
- 77% of Quebecers
- 75% of Ontarians
- 46% of respondents sexually identifying as being lesbian

2

Individuals likely to spend over \$2,000 per leisure trip:

- 42% of high-income earners
- 40% of baby boomers (56+ years)
- 39% of British Columbians
- 36% of Albertans
- 33% of respondents sexually identifying as being gay
- 24% of those earning between \$50,000 to \$100,000 per year

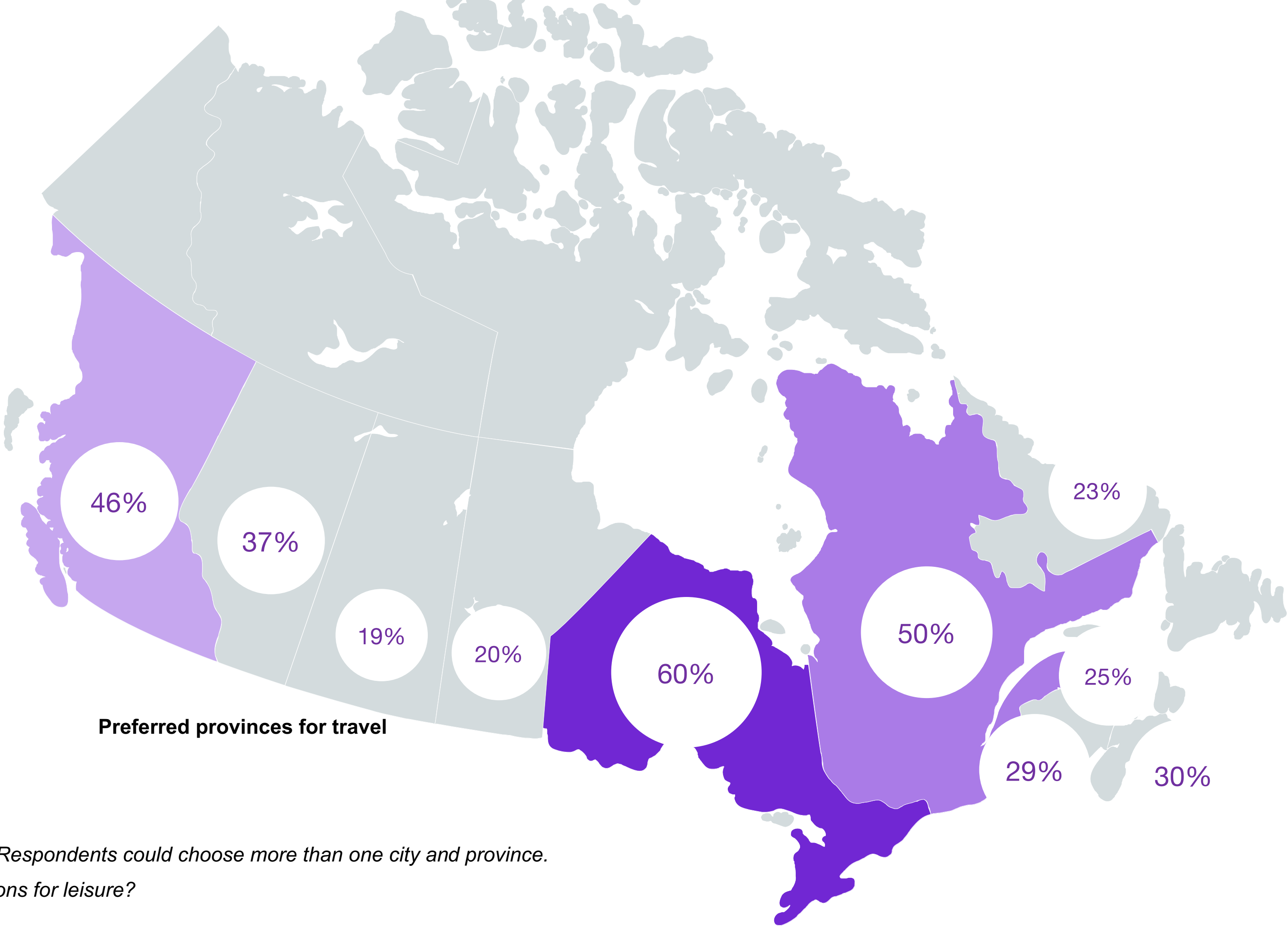
While the preference for short-trips has stayed fairly static, the average trip expenditure has increased by 54% since 2010



Montreal, Calgary, Vancouver and Halifax rank high in preferred travel destinations in 2020

Most preferred cities for travel destinations*:

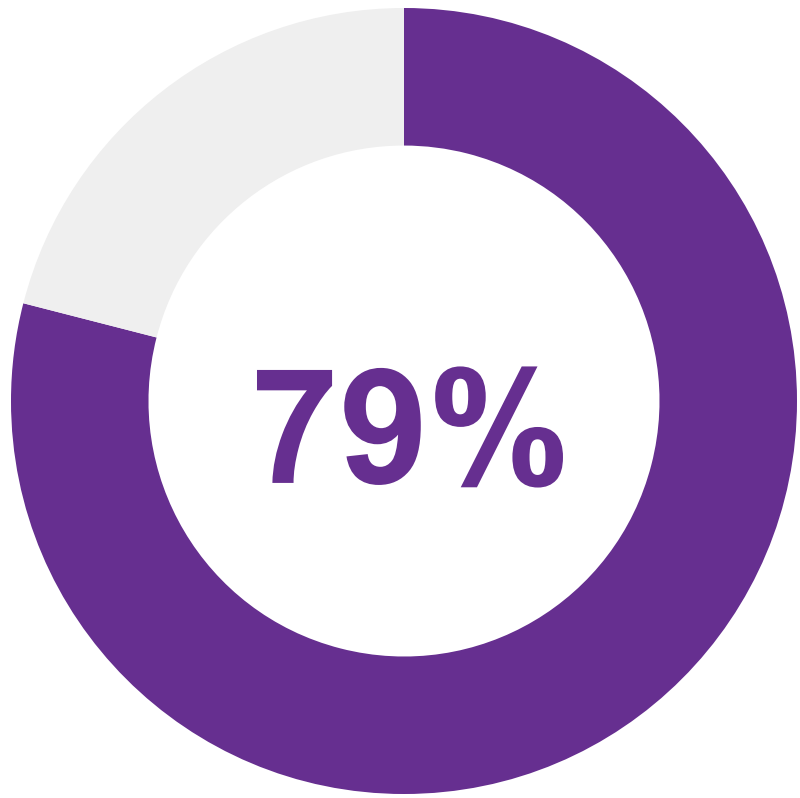
- Montreal (49%)
- Halifax (48%)
- Vancouver (47%)
- Calgary (46%)
- Toronto (42%)
- Winnipeg (41%)
- Saskatoon (38%)
- New Brunswick (29%)
- PEI (25%)
- Newfoundland and Labrador (23%)



* Percentage of respondents that chose specific cities within these provinces. Respondents could choose more than one city and province.
Survey question: In 2020, how likely are you to travel to the following destinations for leisure?

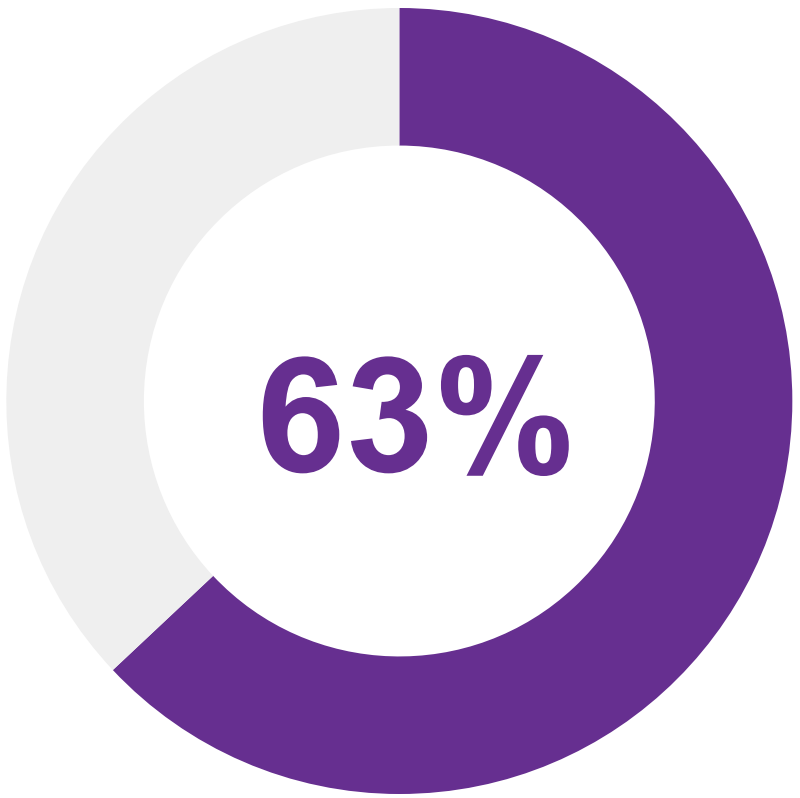
Major metropolitan cities were most preferred as travel destinations in 2019, followed by Tier 2 cities

Destinations in Canada that individuals travelled to at least once:



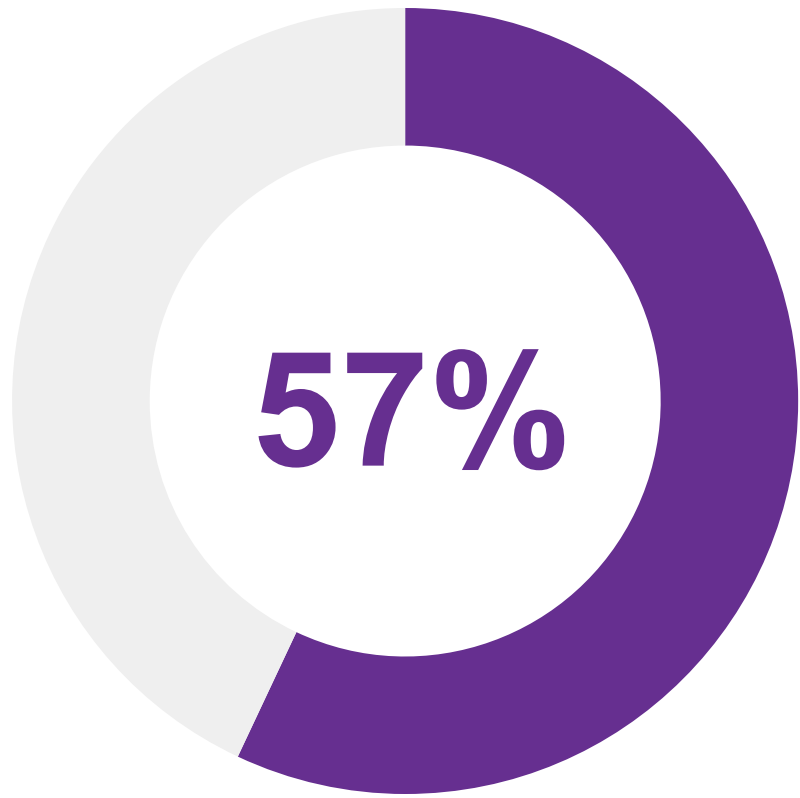
Major Metropolitan Cities

79% of respondents sexually identifying as lesbian travelled to major metropolitan cities at least once



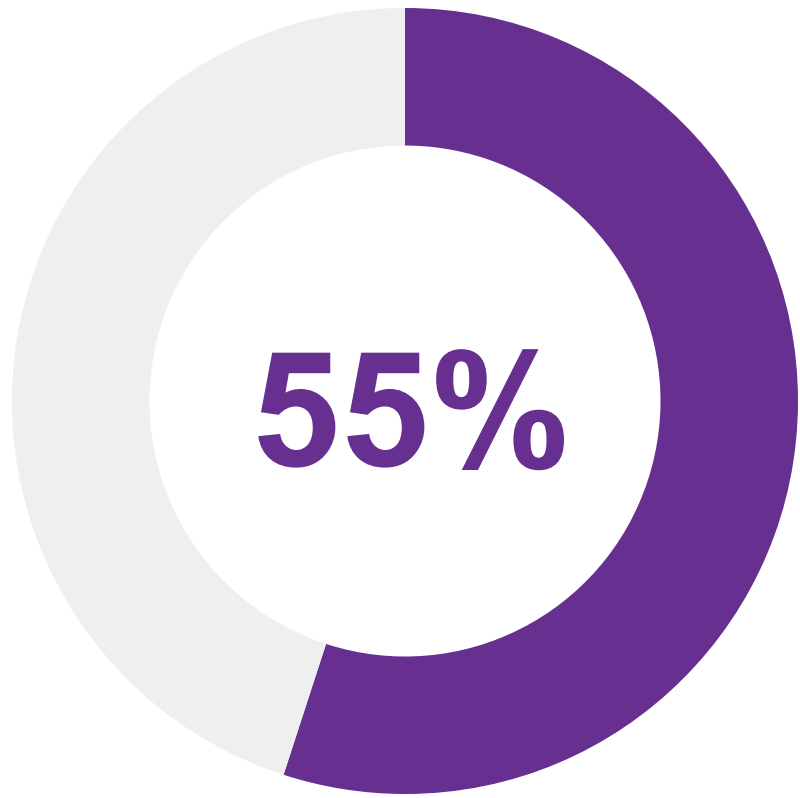
Tier 2 City

58% of those aged 26 to 35 travelled to Tier 2 cities at least once



Countryside

55% of the respondents sexually identifying themselves as gay travelled to countryside at least once

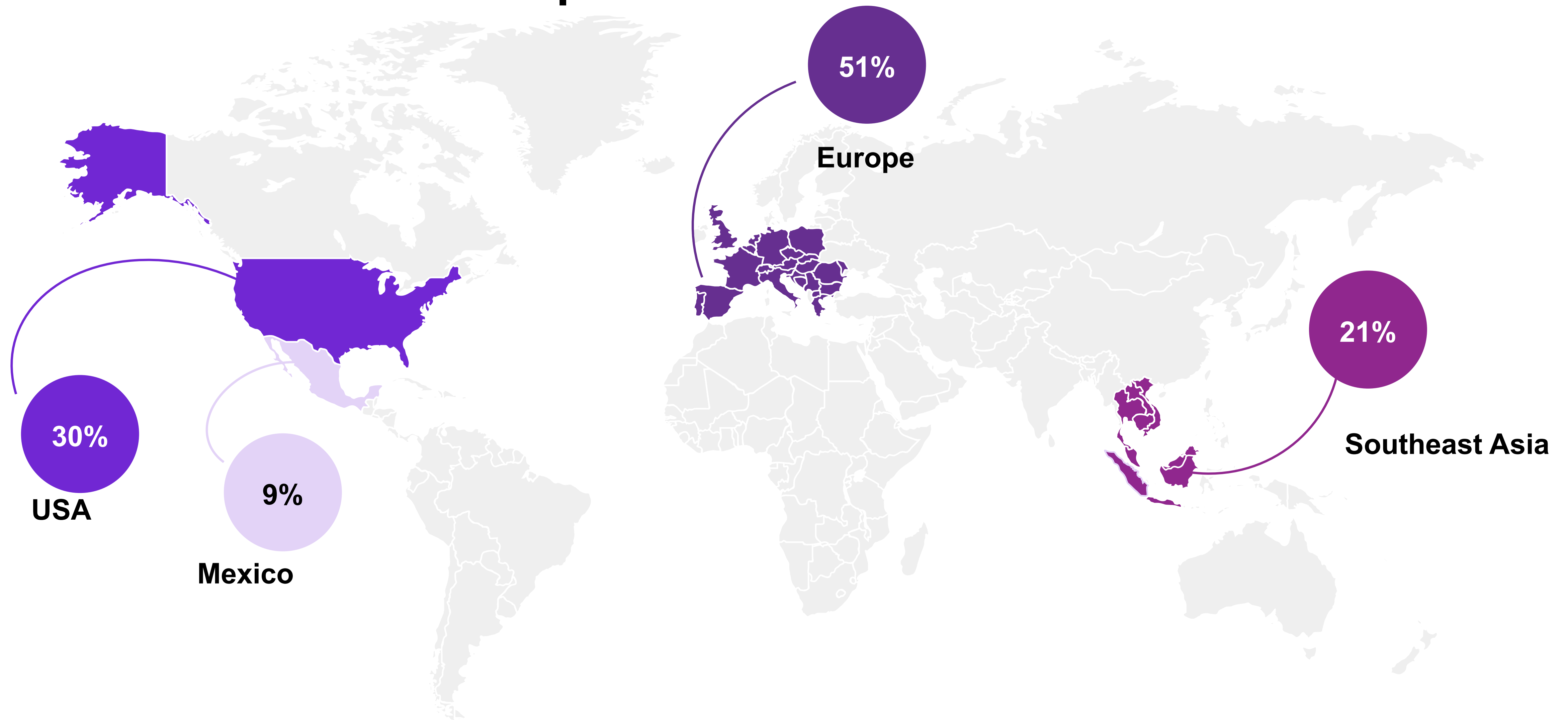


National Parks

62% of those under the age of 35 travelled to national parks at least once

Survey question: Thinking about leisure travel trips to Canadian destinations in 2019, how many trips would you say were primarily in the following types of destinations?

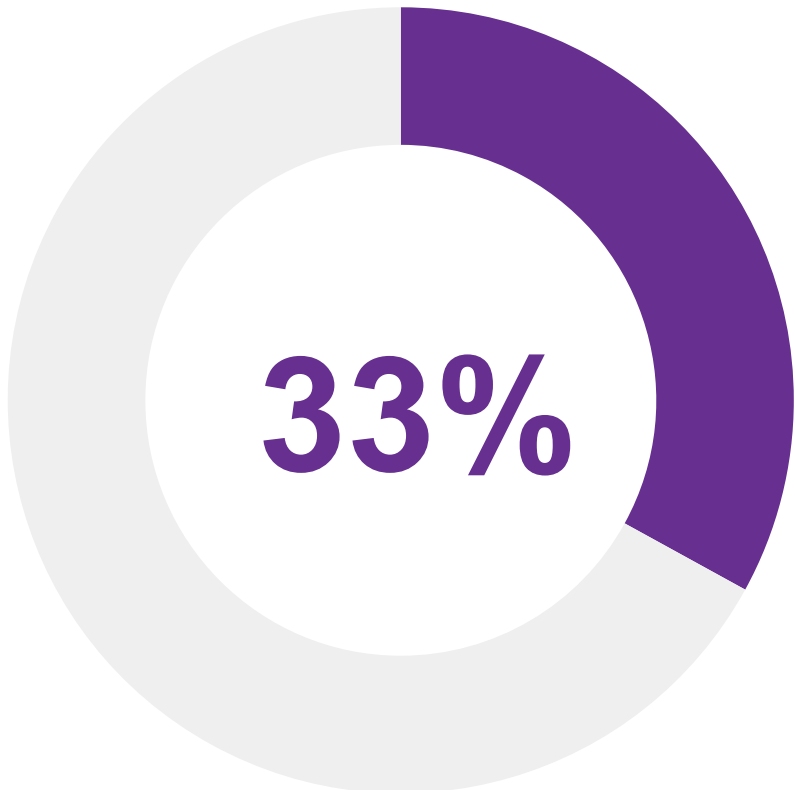
For those traveling only outside of Canada in 2020, Europe is a preferred destination



Note: This survey was fielded just in early March – it is likely that as the pandemic situation evolved, preferences for 2020 might have changed. This is also applicable only to a small subset of the sample – about 10% that indicated they would travel only outside of Canada

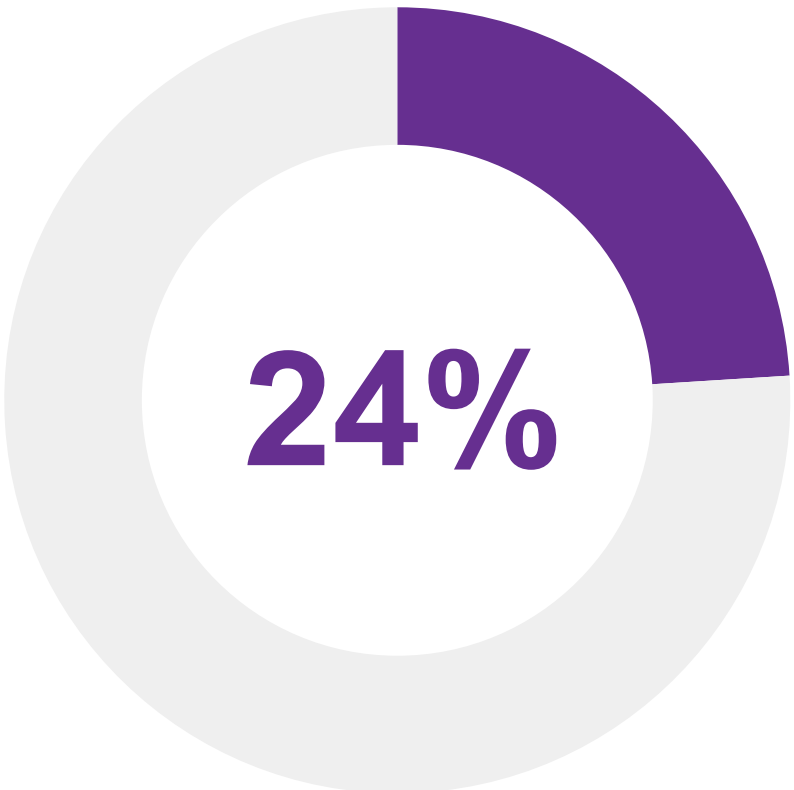
Survey question: You indicated that your leisure travel in 2020 is likely not within Canada. Please list all non-Canadian destinations you have travelled to, and plan to travel to in 2020

Cost is a key factor hindering travellers that intend to not travel within Canada in 2020



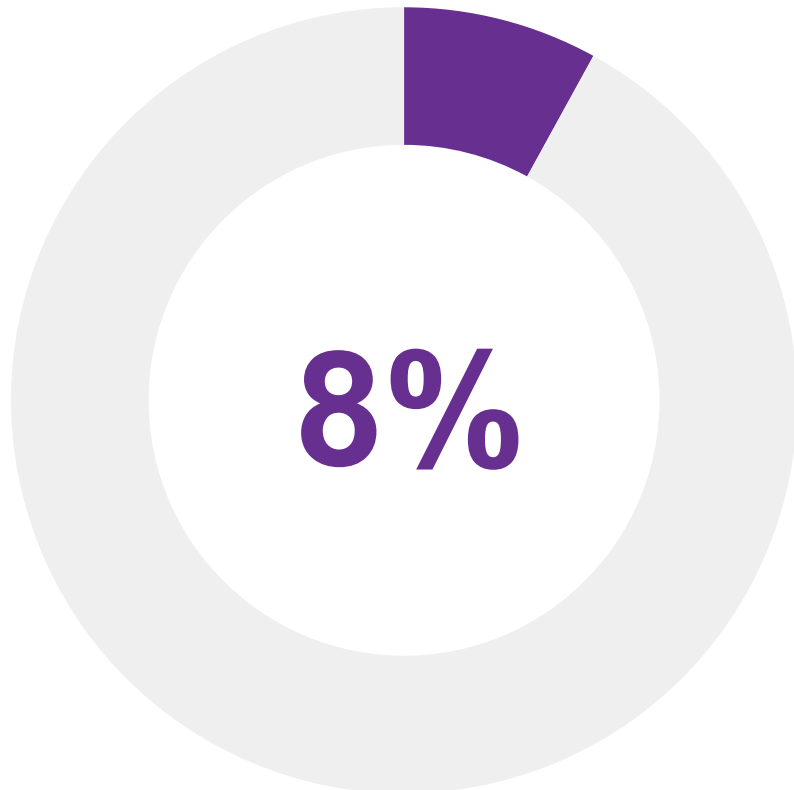
Cost

30% of this group had less than a \$100,000 household income



No interest in Canada

25% of this group had a household income greater than \$100,000



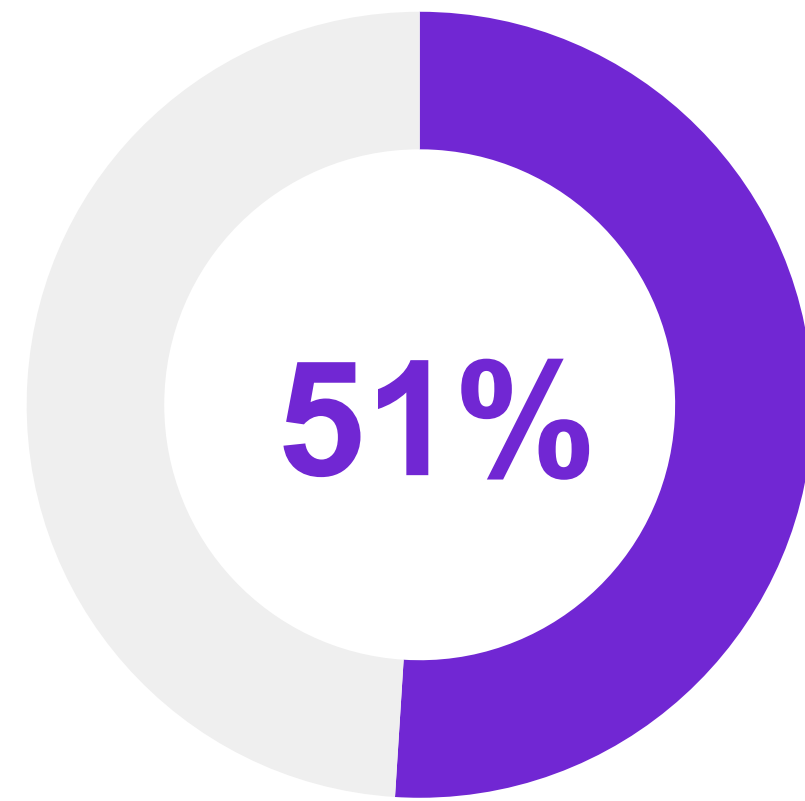
Been everywhere in Canada

25% of this group had a household income of \$100,000-\$150,000

Note: This only applies to respondents that indicated that they have no plans of travelling within Canada – less than 10% of the sample

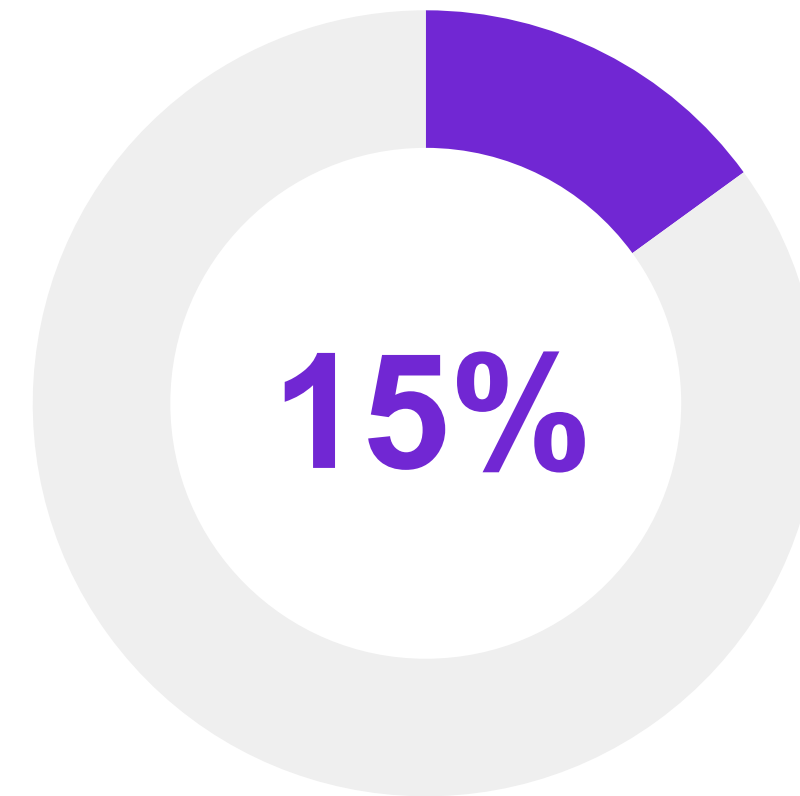
Survey question: You indicated that you are not at all likely to take a leisure travel trip within Canada in 2020. From the list below, please rank the most to least important reason you are not likely to take a leisure trip within Canada in 2020

Overall travel intentions in 2020 appear to have been impacted by concerns around COVID-19



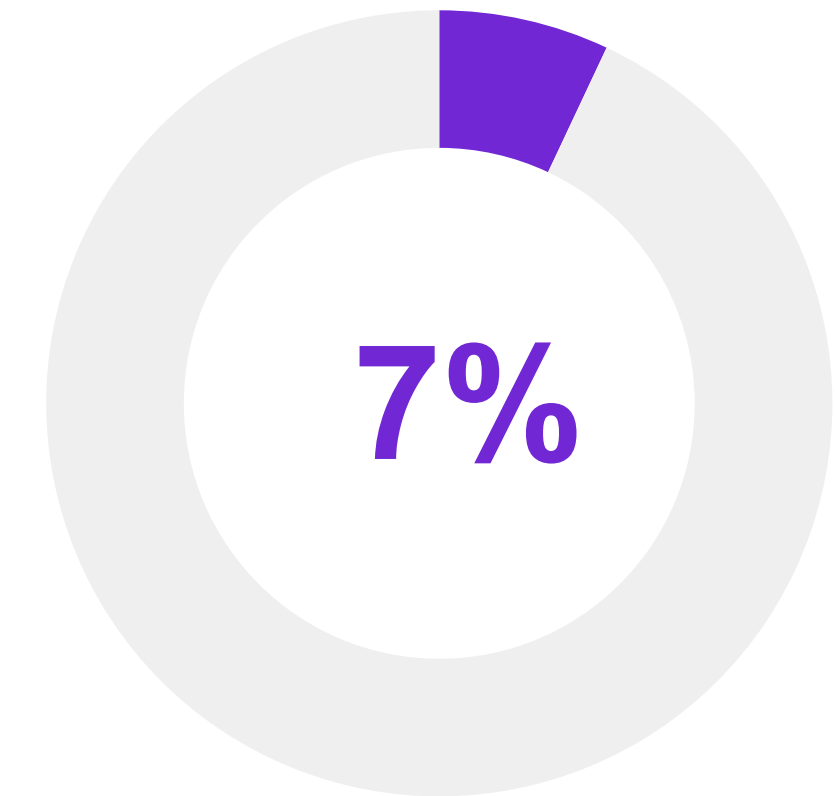
**COVID-19
Concerns**

This is a concern across all demographic groups.



**Budget/Cost of
Travel**

A key concern for younger age groups.

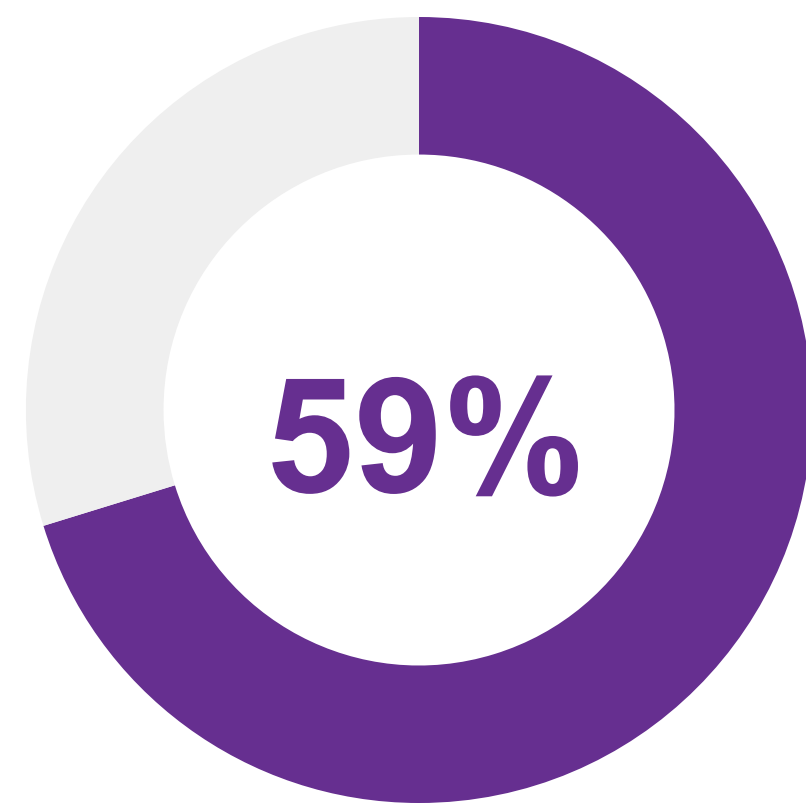


**Less Income/To
Save Money**

Predominantly a concern for Gen X working professionals (36 – 45 years).

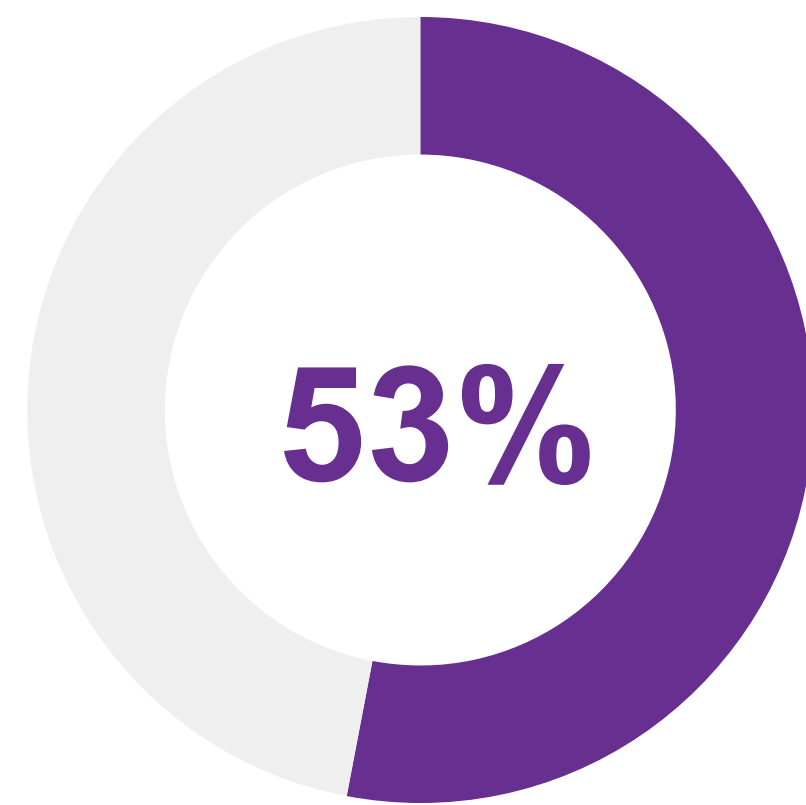
*Note: This only applies to respondents that indicated that they expect their travel to decrease in 2020, roughly 30% of the sample
Survey question: You indicated that you expect your leisure travel trips to decrease in 2020 compared to 2019. Can you briefly tell us why?*

Over half of the individuals consider safety to be a very important factor when choosing travel destinations



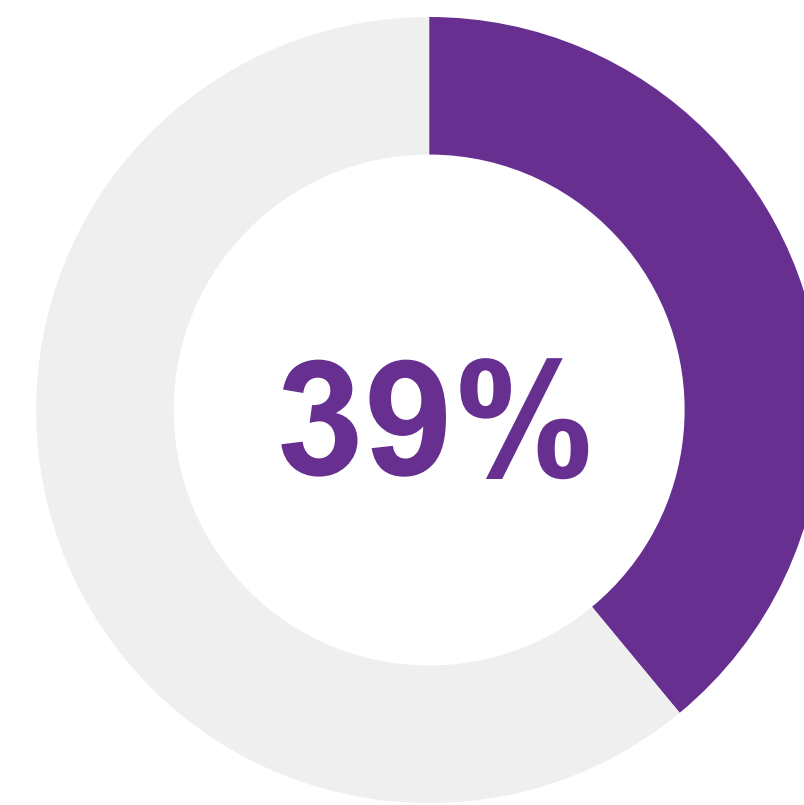
Safety

67% of respondents identifying as lesbian indicated that safety is a very important factor.



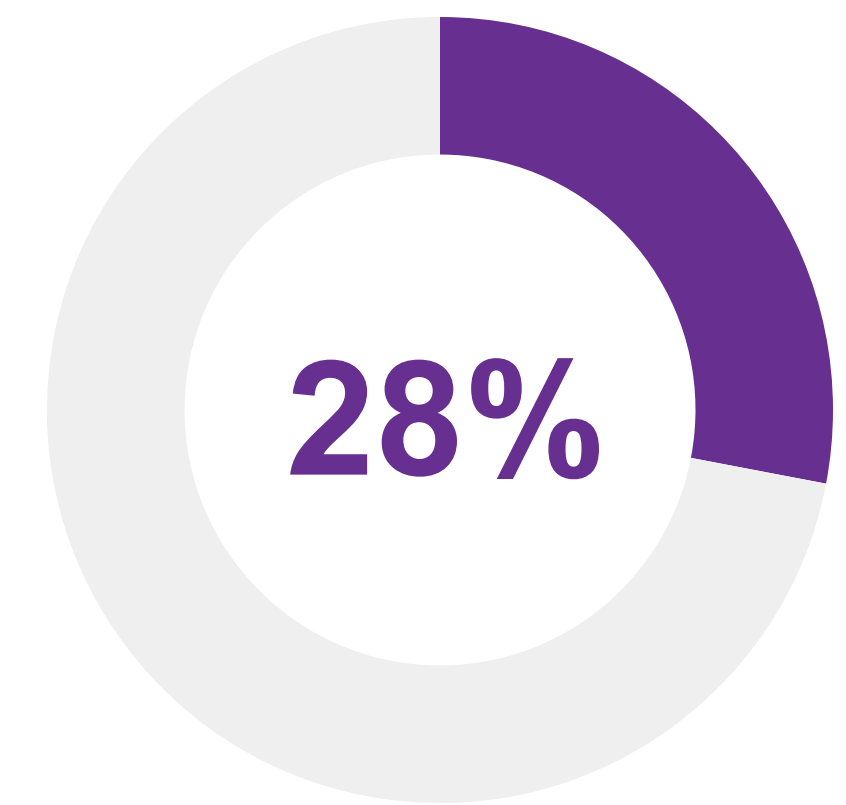
Cost/Value of Money

58% of millennials and Gen Z individuals consider costs to be a very important factor in their decision making.



Climate

Nearly half of the baby boomers (56 years and over) consider climate to be a very important factor.



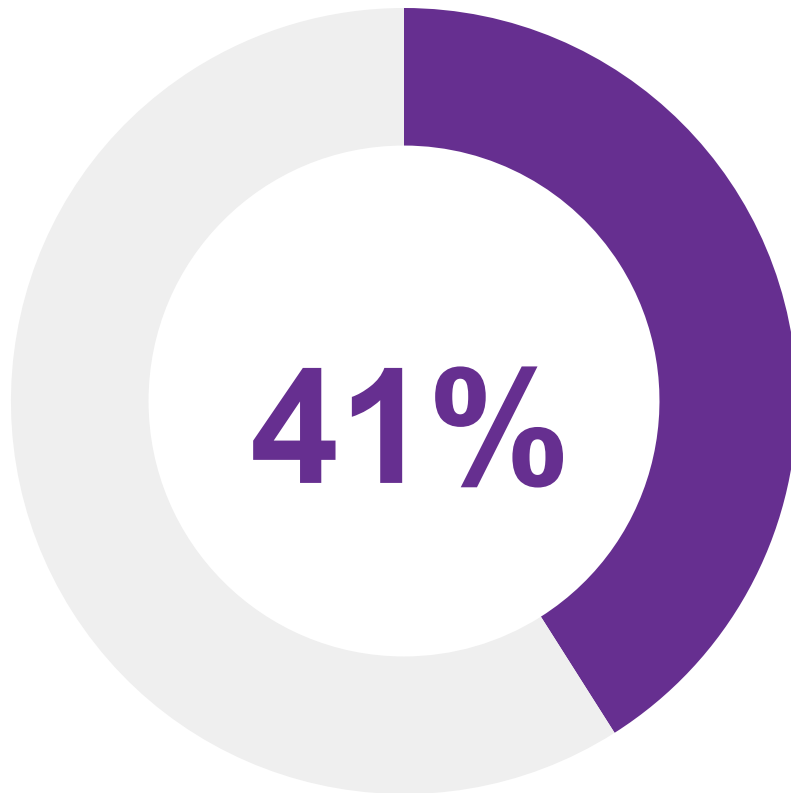
Political Climate

35% of respondents sexually identifying as gay indicated that political climate is a very important factor.

Note: Donut charts indicate percentage of respondents that stated that these factors are “very important” when making their decisions about travel destinations

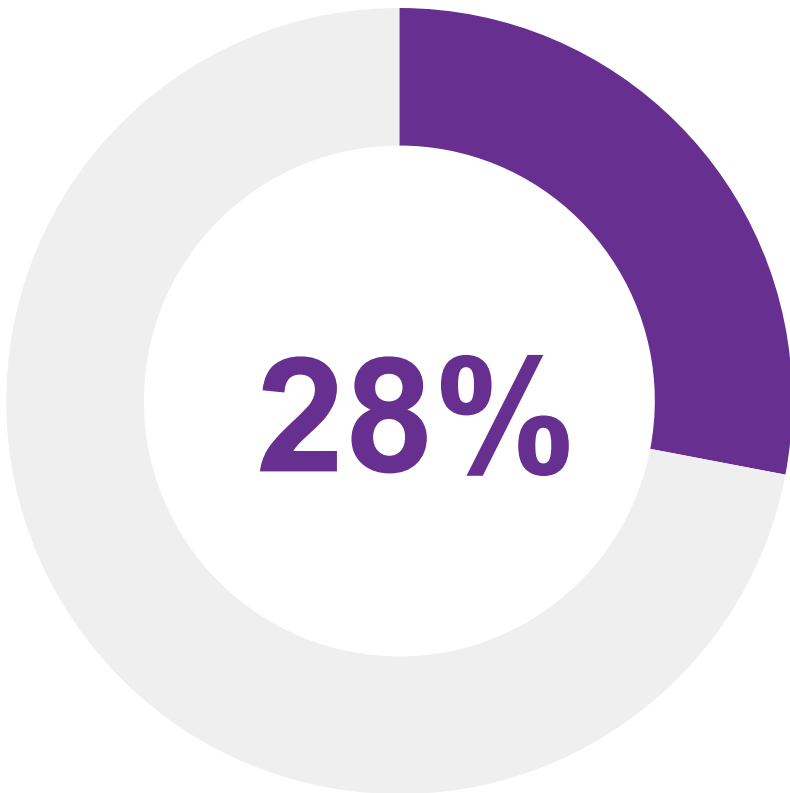
Survey question: When choosing a travel destination, how important are the following factors?

Over 80% engage in food and dining activities when travelling for leisure – and half of them consider this activity to be very important



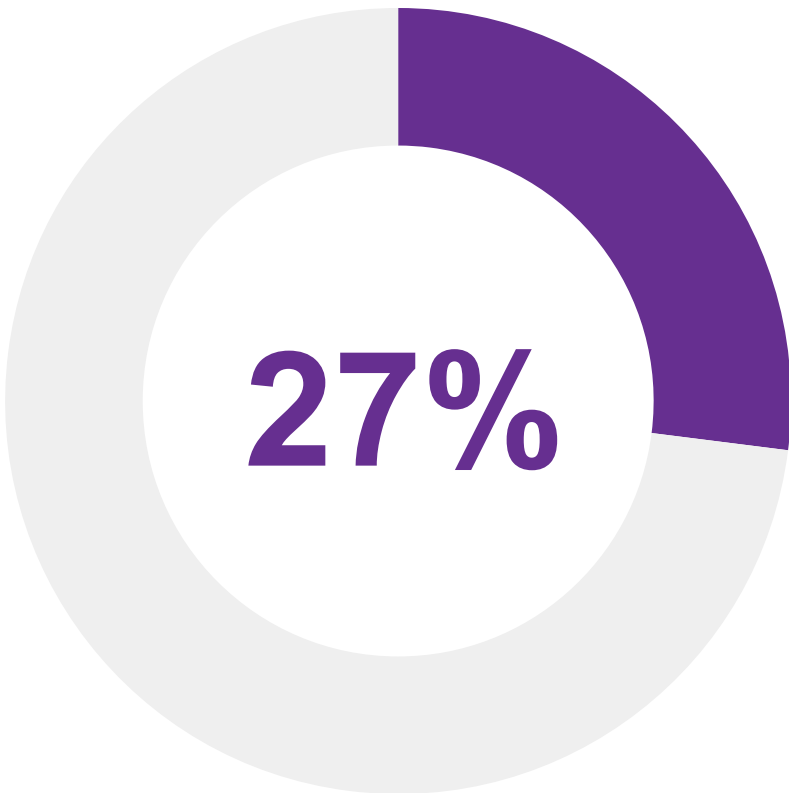
Food & Dining

Over 40% of those with an annual household income exceeding \$50,000 tend to view this activity as the most important.



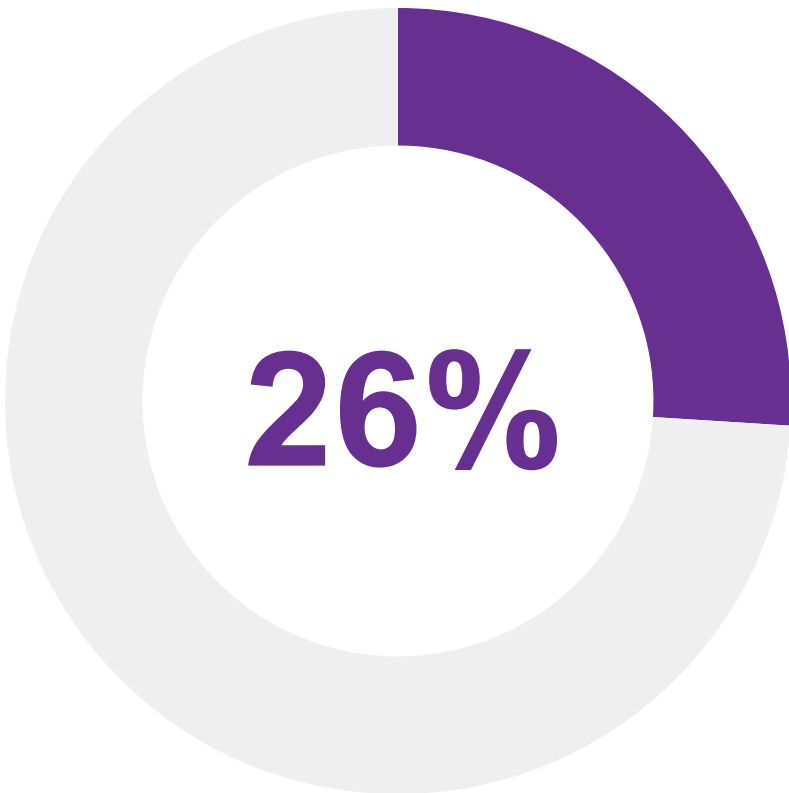
Popular Tourist Attractions

Nearly a third of Ontarians, Quebecers and British Columbians tend to view this activity as the most important.



Nature-related Activities

33% of respondents sexually identifying as bisexual consider nature-related activities to be very important.

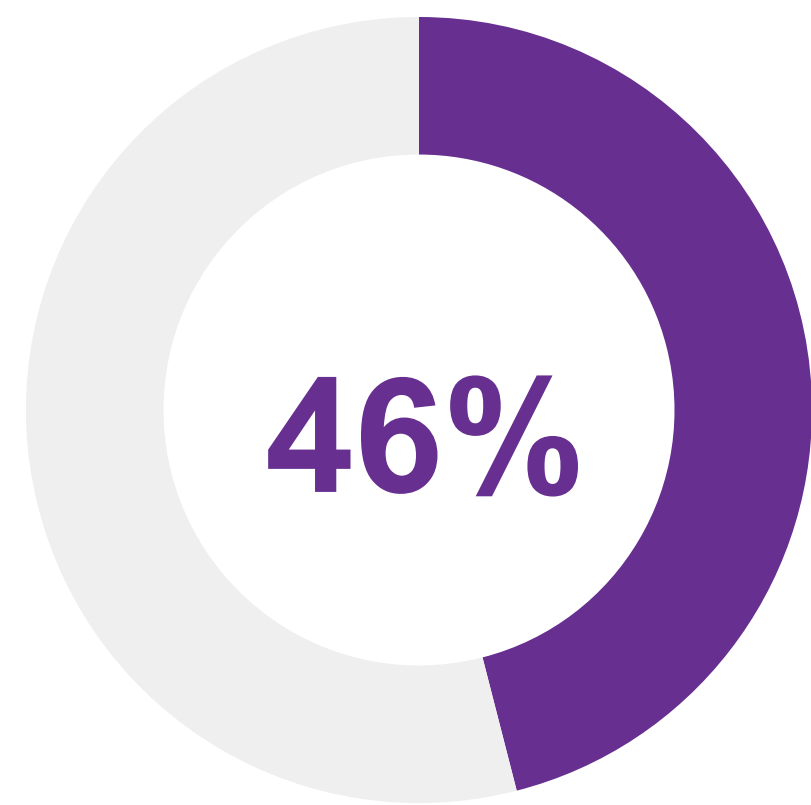


Arts & Culture

32% of respondents sexually identifying as gay consider arts and culture activities to be very important.

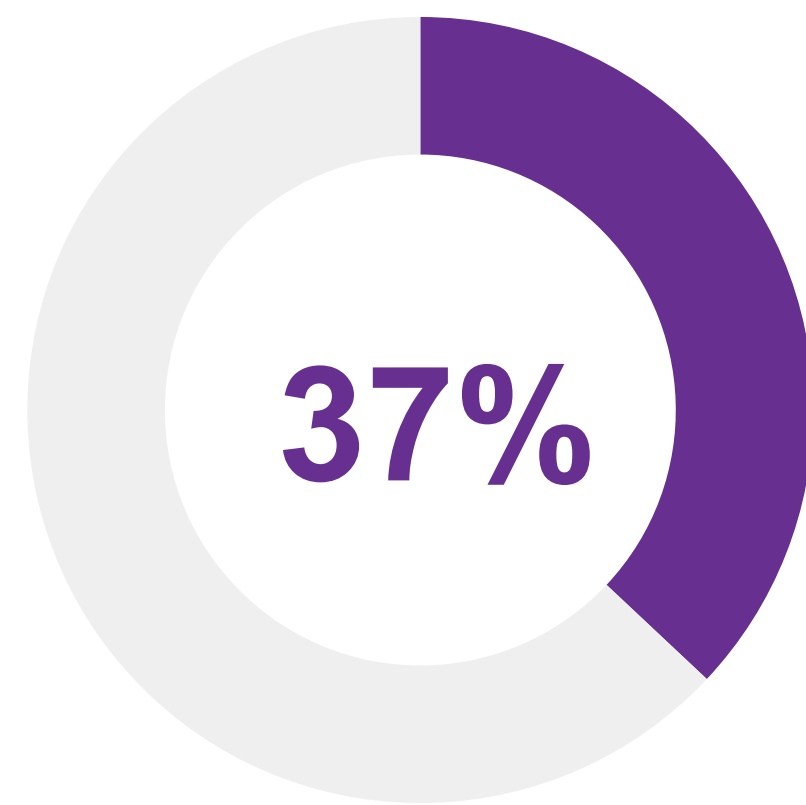
*Note: Donut charts indicate percentage of respondents that stated that these activities are “very important” when thinking about the activities they tend to engage in
Survey question: When thinking about leisure activities, which of the following factors are most important to you?*

Cost minimization is the single biggest consideration when choosing an accommodation



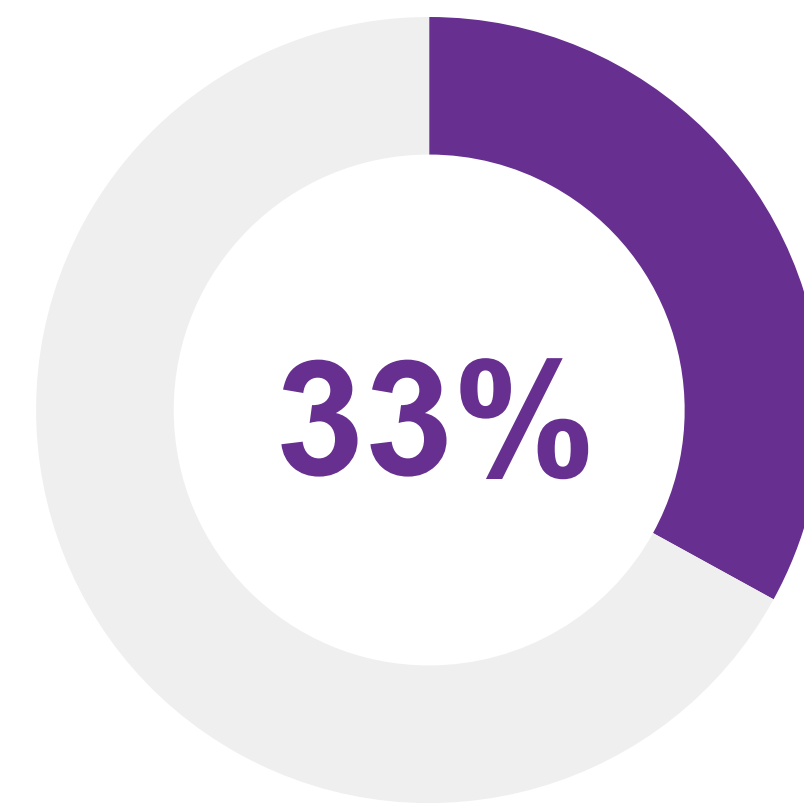
Cost/Minimizing Expenditure

Nearly half of those earning less than \$100,000 per year consider this to be a very important factor when choosing travel accommodation.



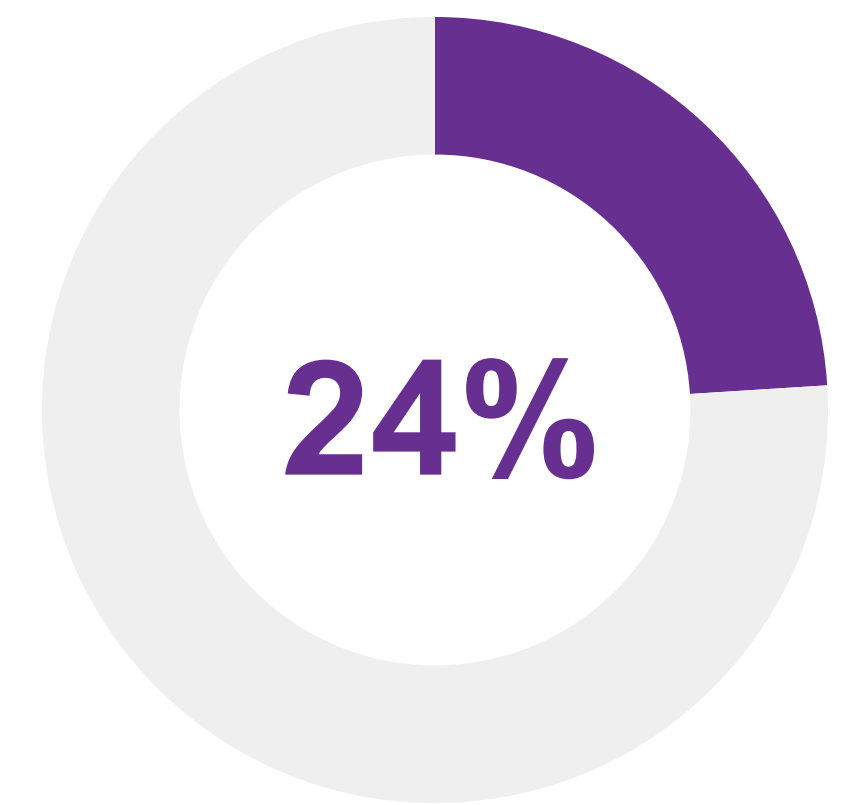
Reviews and Ratings

Nearly 40% of those with a college degree consider this to be a very important factor.



Amenities of Accommodation

Nearly 40% of millennials (26 to 35 years) consider this to be a very important factor when making their decision.



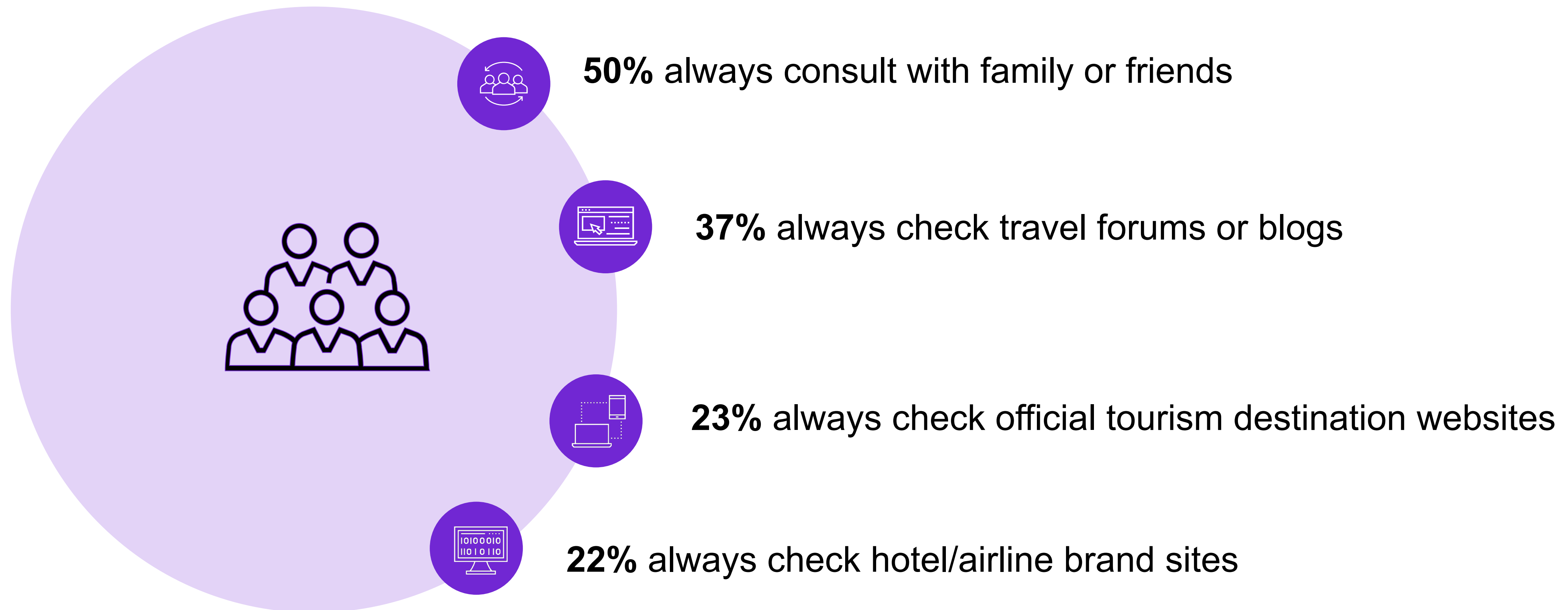
Proximity to Tourist Attractions

Nearly a third of those younger than 45 years of age considered this to be a very important factor.

Note: Donut charts indicate percentage of respondents that stated that these considerations are “very important” when choosing their accommodations

Survey question: When thinking about leisure accommodations, which of the following factors are most important to you?

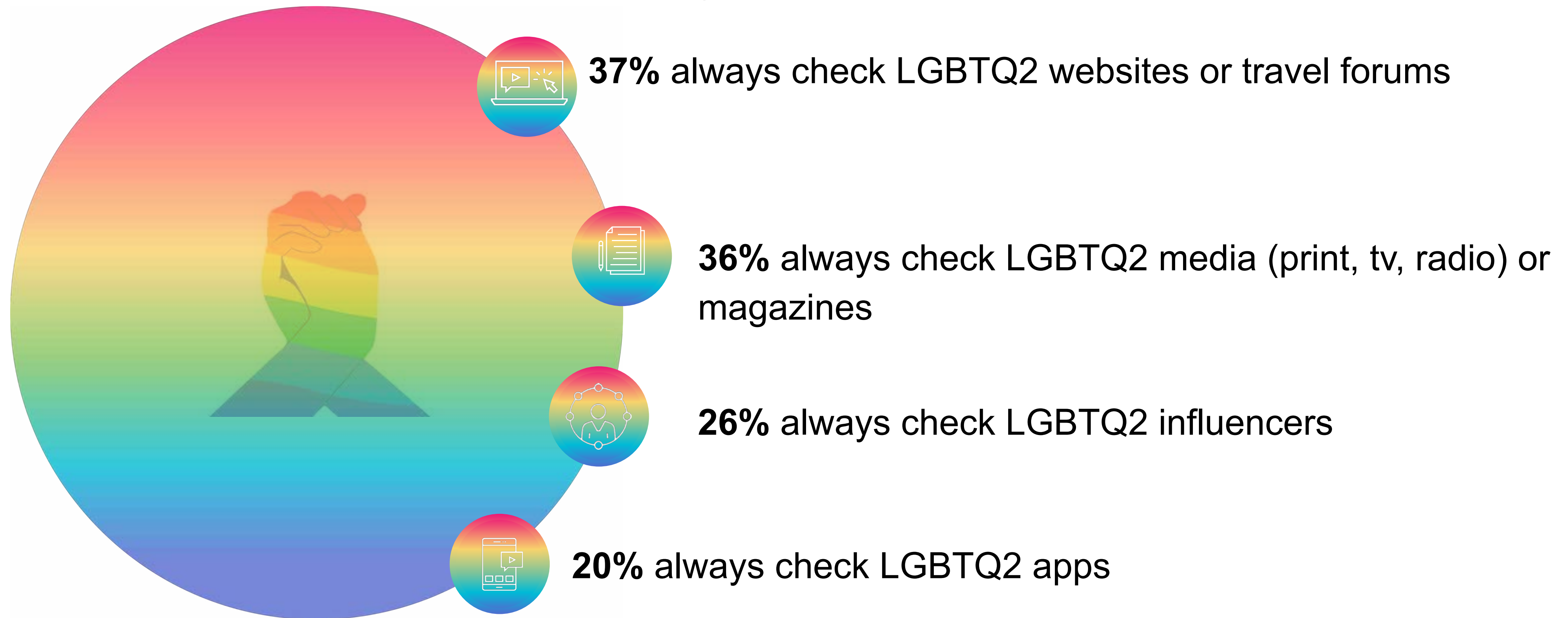
Most travellers consult family and friends when making travel decisions



Survey question: When typically planning a leisure travel trip, how often do you refer to the following sources?

LGBTQ2 websites and magazines are the most used sources for individuals that refer to LGBTQ2-specific information

Amongst those that use LGBTQ2 resources (45%), the resources that are always used are:



Survey question: You indicated that you use a LGBTQ2 specific resource when planning leisure travel trips. Please indicate how often you use the following sources?

Summing up



The LGBTQ2 community contributes significantly to the leisure travel market

The community as a whole, spends an estimated \$12.3 billion on travel annually.



Individuals' average travel expenditure has increased by over 50% over the past decade

Each traveller on average, spends about \$1,855 per trip.



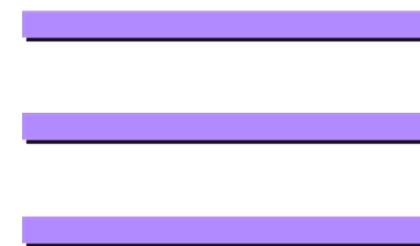
Cost and safety are two major decision drivers when choosing leisure travel destinations

89% think about safety and 88% about costs when choosing their next vacation destination.



Canadian destinations remain popular amongst LGBTQ2 travellers

Over 90% report intending to travel within Canada in 2020 – however, most popular destinations continue to be metropolitan and Tier 2 cities.



LGBTQ2 resources are useful when planning

45% report referring to some form of LGBTQ2 resource when planning. However, when it comes to activities at the destination, an overwhelming majority report food and dining as their top activity choices.



COVID-19 concerns loom large for LGBTQ2 travellers

Over half of the individuals who reported that they won't likely travel within Canada over the next twelve months, cited COVID-19 concerns as a key reason.

Section 4

Appendix

- Methodological notes
- Detailed topline results



Additional Methodological Notes

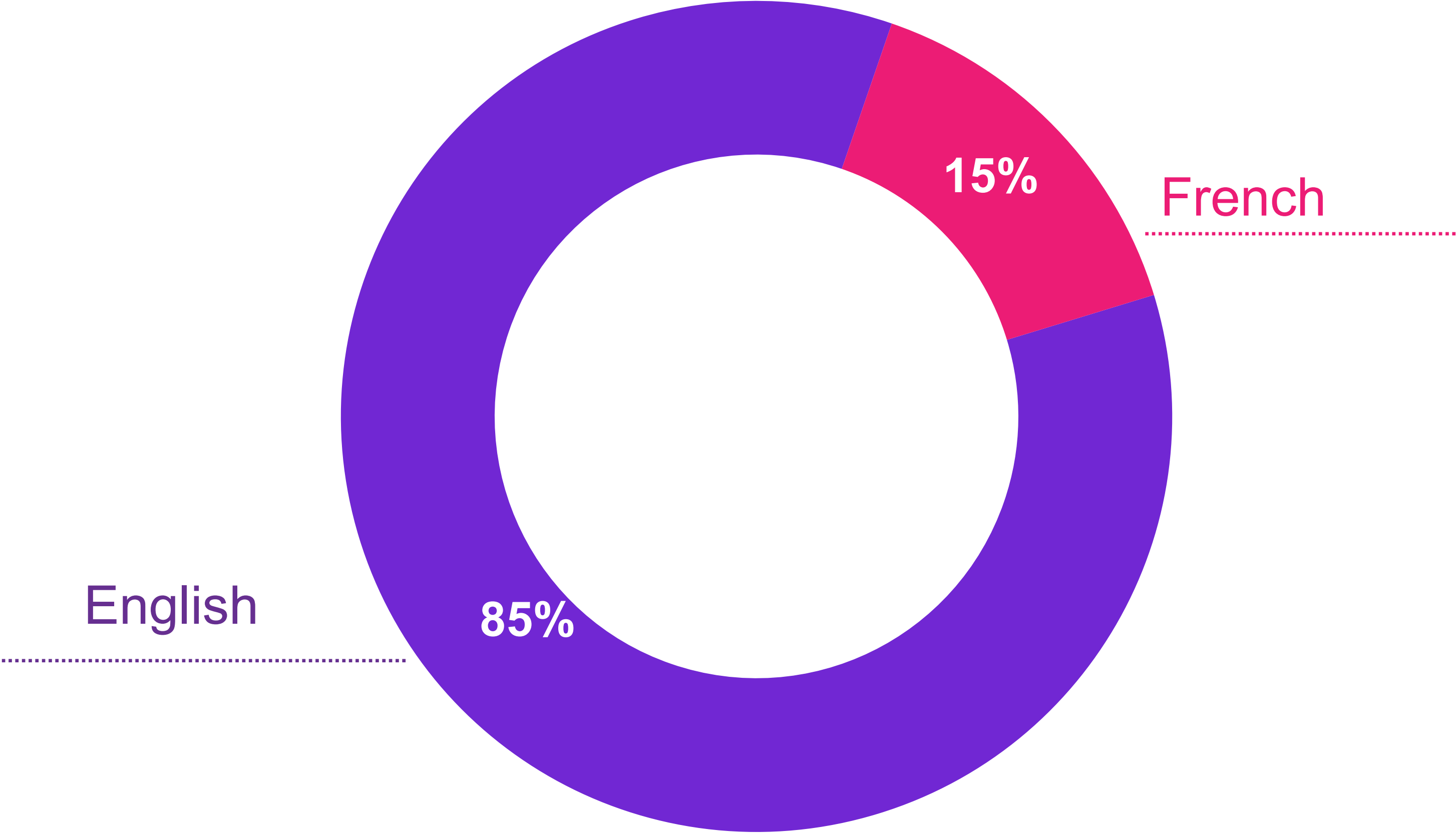
The intention of this study was to examine travel behaviours and motivators amongst the Canadian LGBTQ community. As such, the primary focus of the survey was to collect responses from the community as a whole. Given the paucity of data, it is nearly impossible to arrive at a robust understanding of the LGBTQ2 population's distribution (in terms of age, geography, gender identity, sexual identity etc.) in Canada.

The sample for this study was drawn from Leger's online panel of respondents. Leger is a highly reputable North American polling firm. Leger has carefully set up and continues to curate its sample to be highly representative of the Canadian population. As such, the final sample for this study was composed of 1,455 respondents that self-identified as being over 18 years of age, being a part of the LGBTQ2 community, and having travelled at least once for leisure.

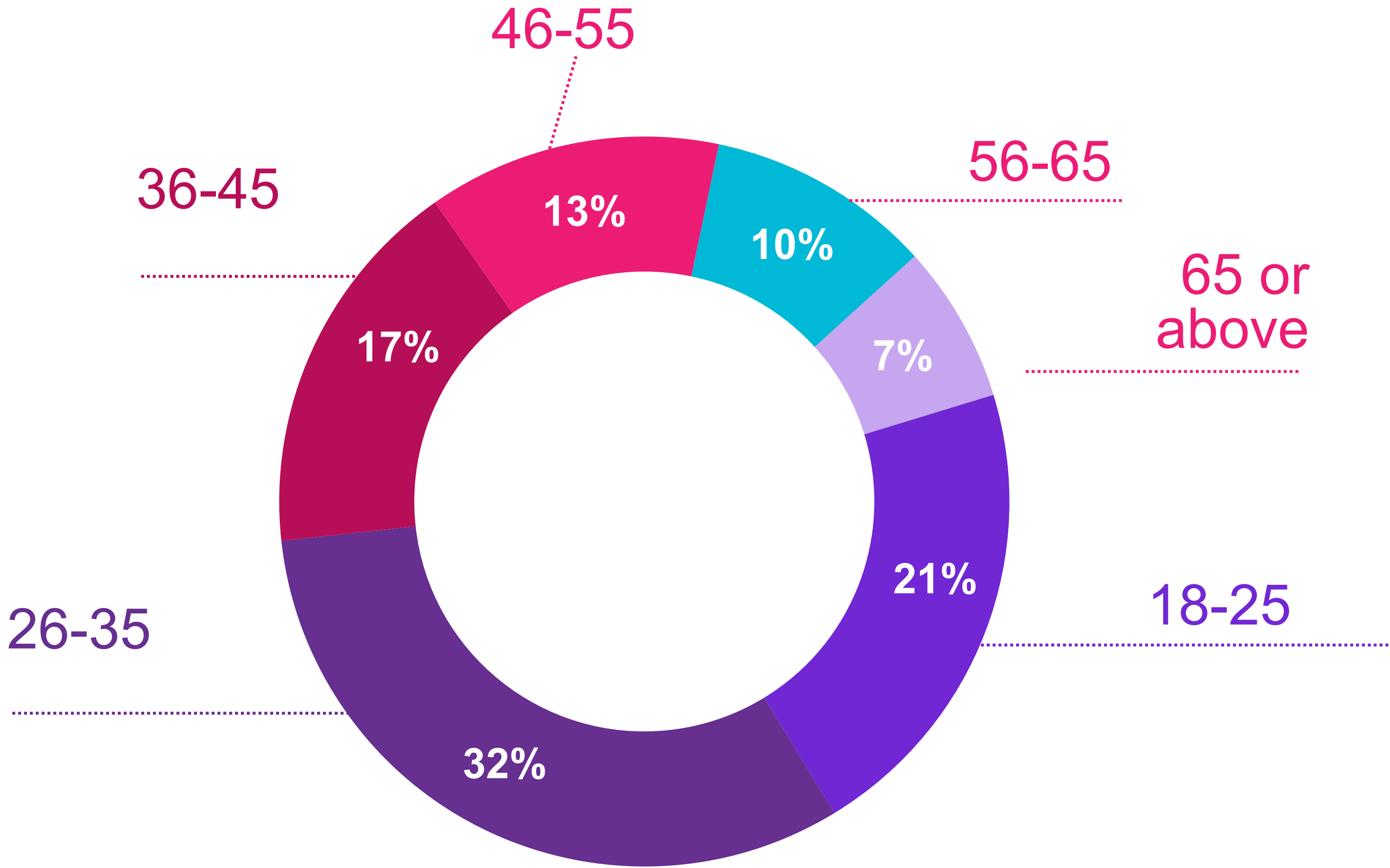
The final sample was highly aligned with general Canadian population's distribution in terms of geography and age. The lack of trustworthy data on LGBTQ2 population distribution coupled with the general statistical validity of the sample led us to refrain from weighting the sample.

Finally, the survey was out in the field in early March, when the COVID-19 crisis had not escalated yet – however, given that the survey was in the field for over two weeks, and the COVID-19 situation had evolved rapidly, we introduced an option to allow respondents to let us know if they did not plan to travel in 2020 for reasons other than those listed in the options. We introduced this quite early when the survey was in the field, which allowed us to capture respondents' growing concerns around COVID-19.

Q0: Would you prefer to complete the survey in English or French?



SCR1AGE: What is your age range?

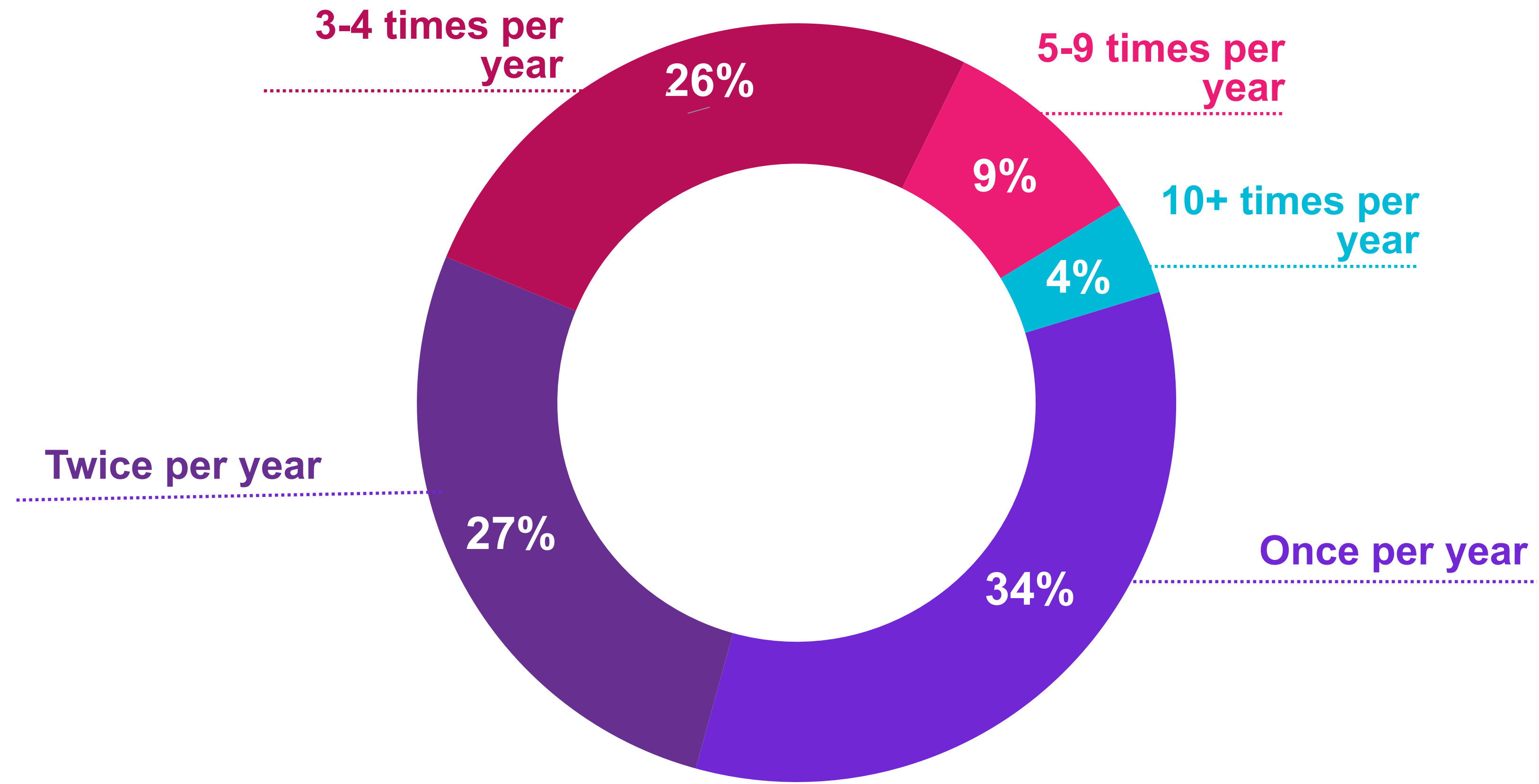


SCR2Orientation: Please indicate how you identify your sexual orientation/attraction?

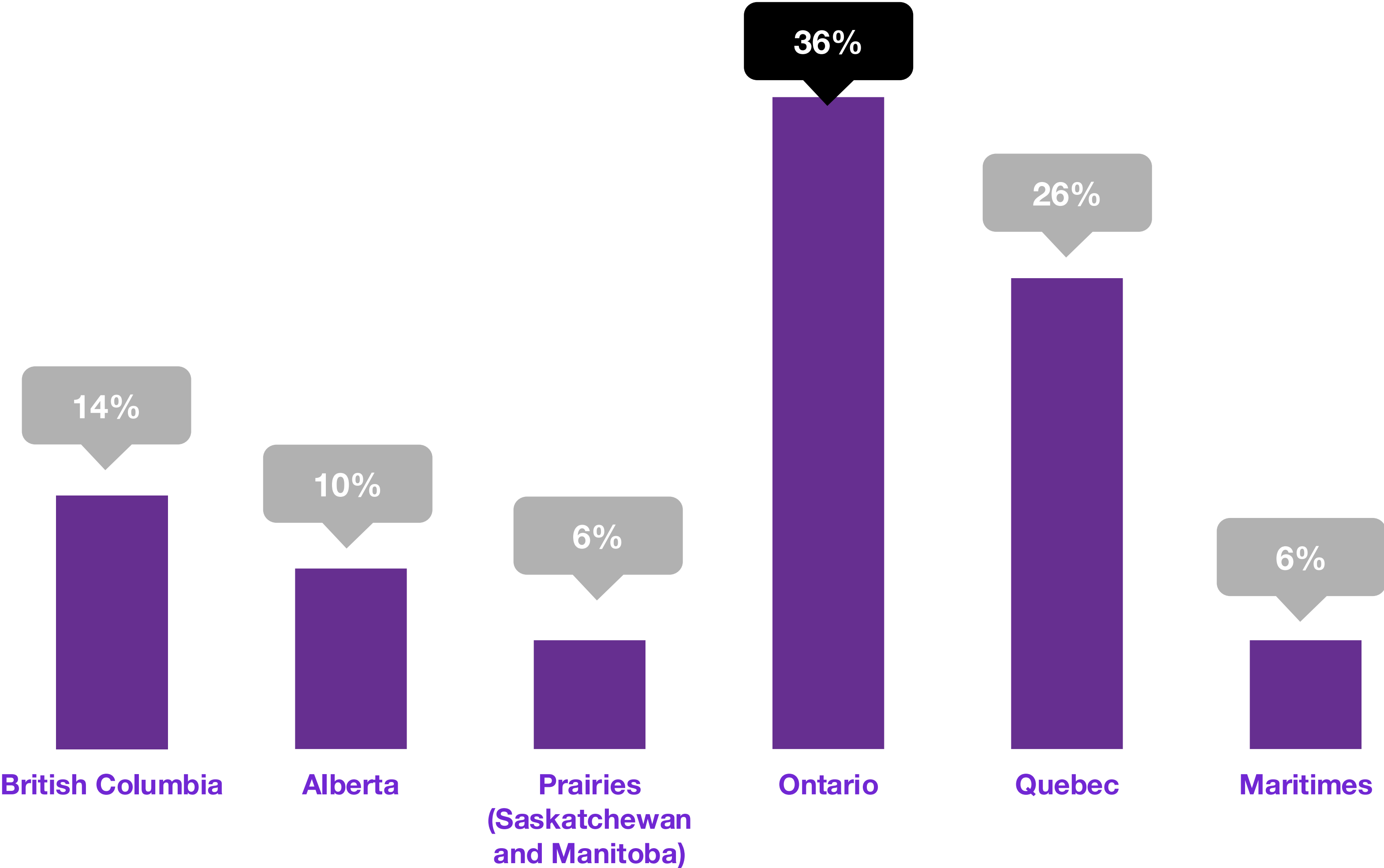
Bisexual	31%
Asexual	31%
Gay	19%
Lesbian	5%
Pansexual	5%
Queer	3%
Questioning	3%
Two Spirit	1%

Note: Please refer to the methodological notes at the start of the appendix (p.33) for more information about weighting decisions applied in analyzing this survey.

SCR3Travel: On average, how often do you travel for leisure every year?



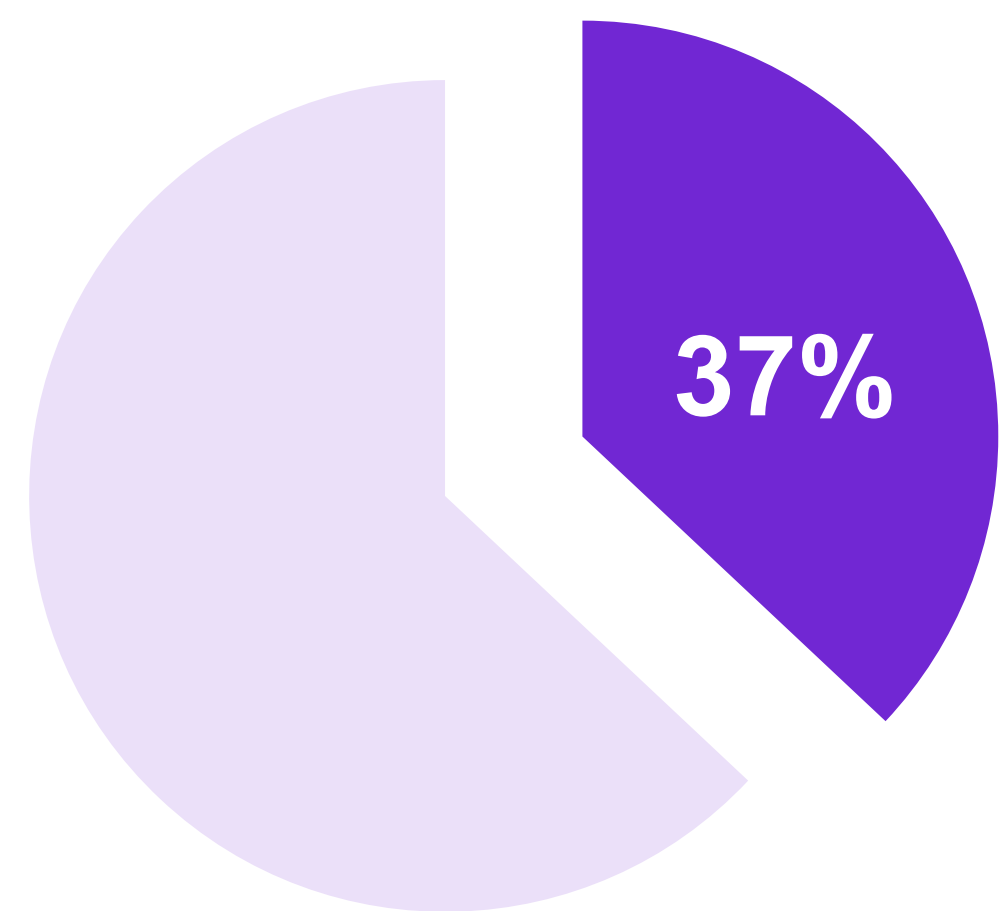
Qregion: What province or territory do you currently live in?



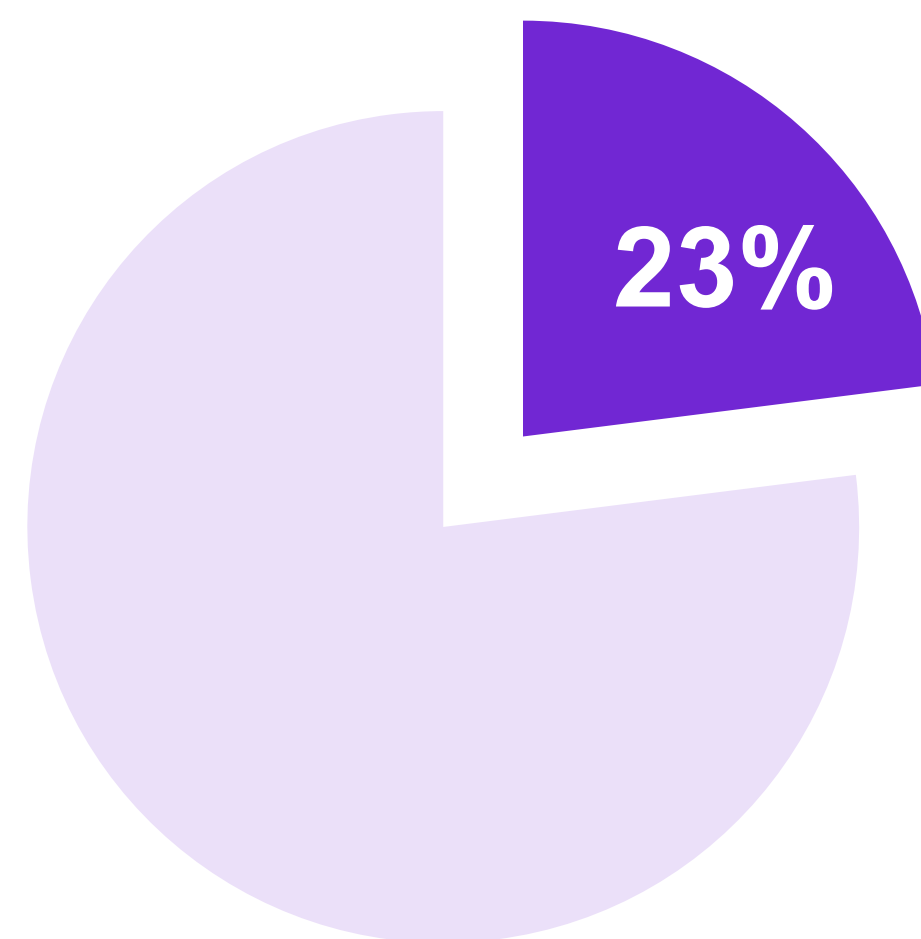
Q5: On average, how often do you take the following types of leisure trips every year?

Trip Type	Never	Once	Twice	Three to Four times	Five to Nine times	Ten times or more
Short (5 days or less)	12%	30%	25%	22%	8%	4%
Medium (6 to 10 days)	24%	46%	21%	7%	2%	0%
Long (11 days or more)	42%	40%	11%	4%	2%	1%
Longer (working holiday or backpacking for several months)	76%	13%	6%	4%	2%	1%

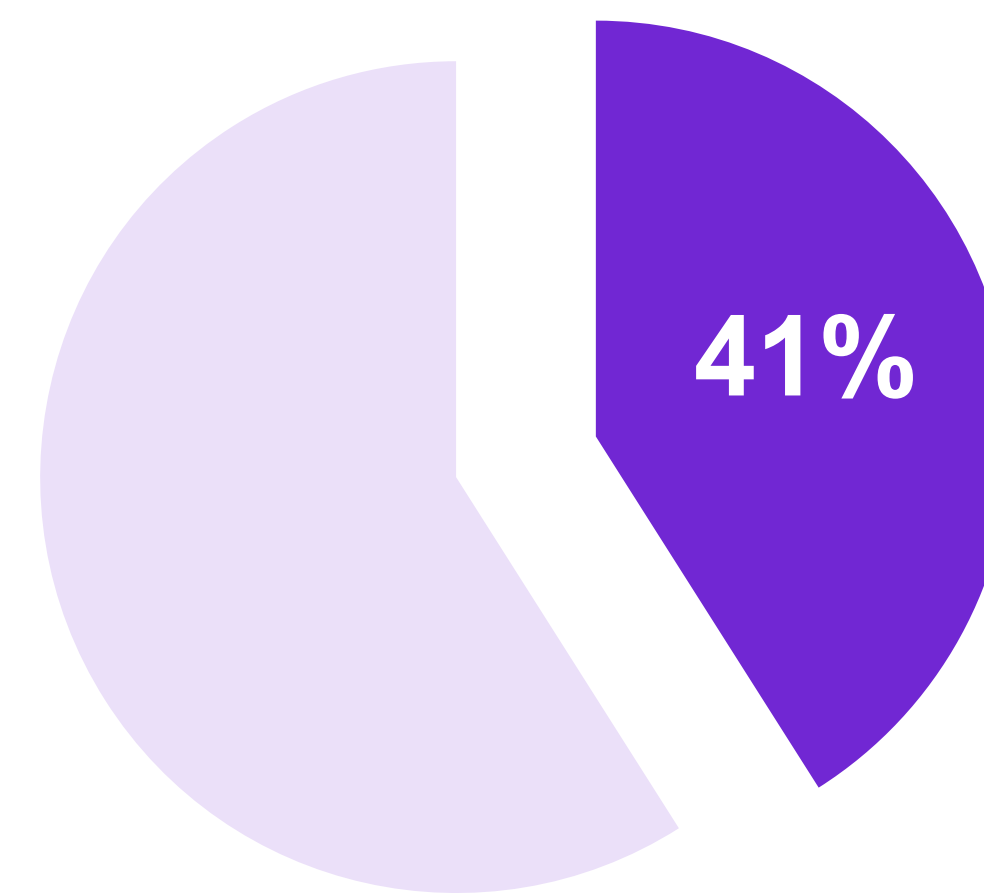
Q6A: When compared to 2018, did the number of leisure trips you've taken increase, decrease, or stay the same?



Increased

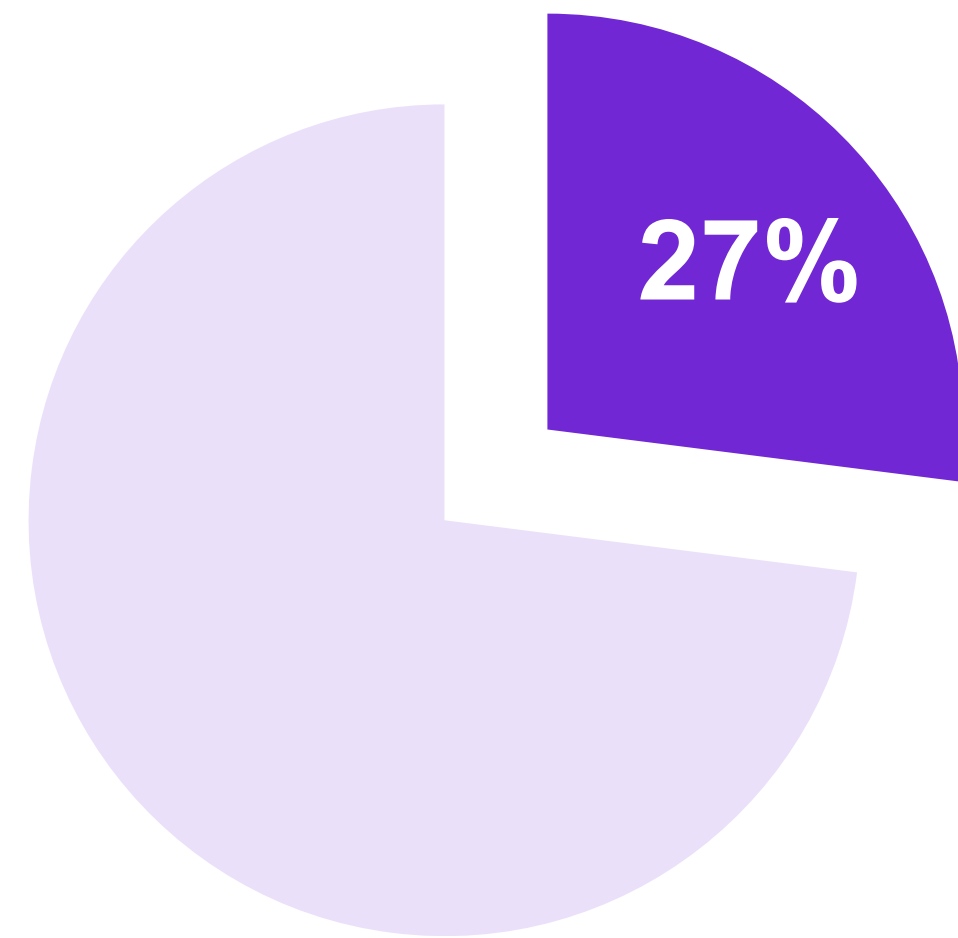


Decreased

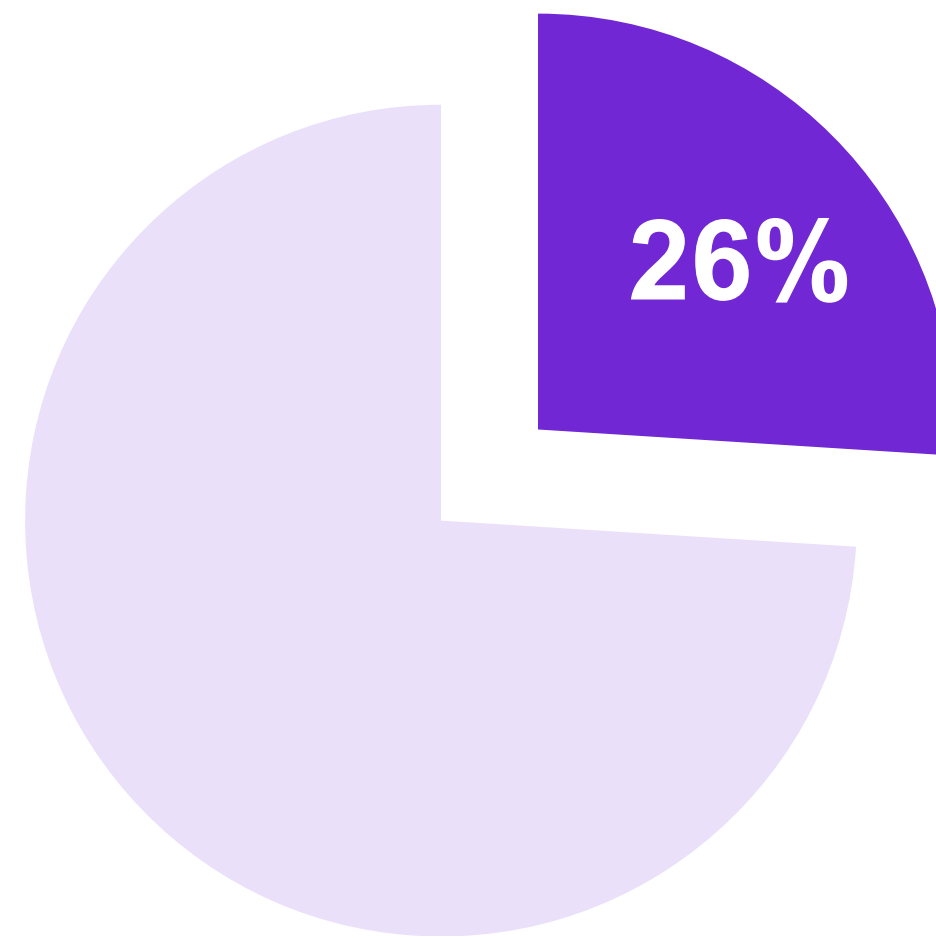


Stayed the Same

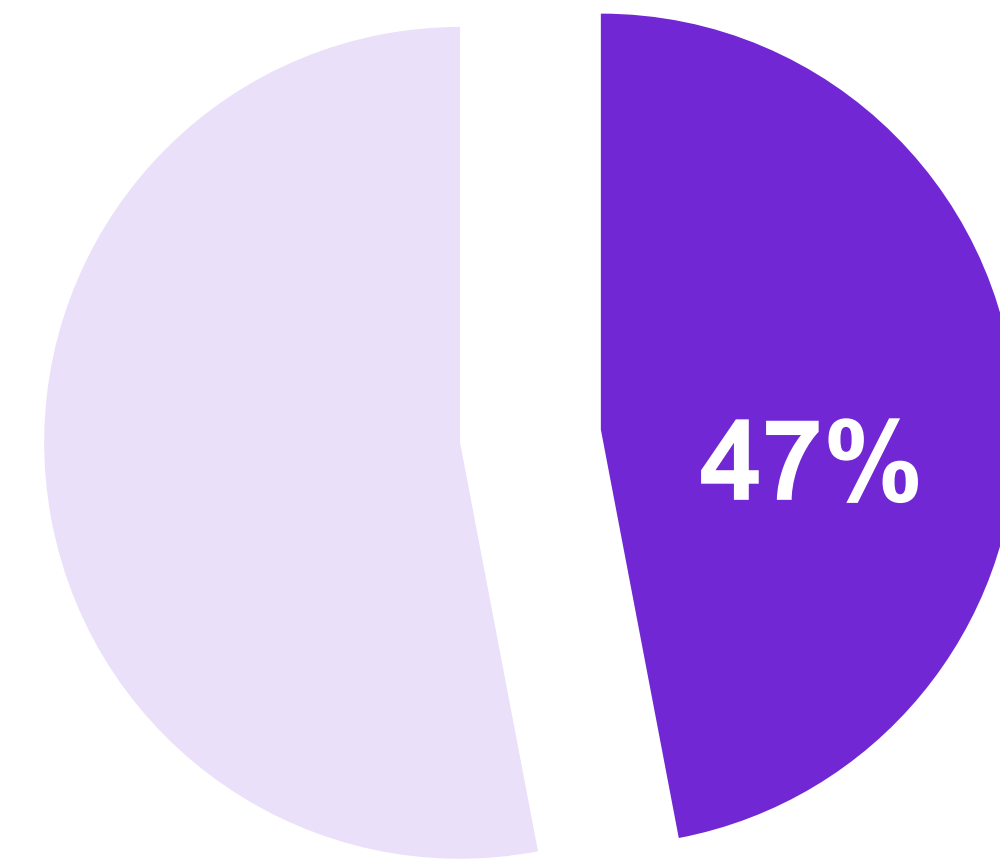
Q6B: When compared to 2018, did the number of flights taken for leisure trips increase, decrease, or stay the same?



Increased

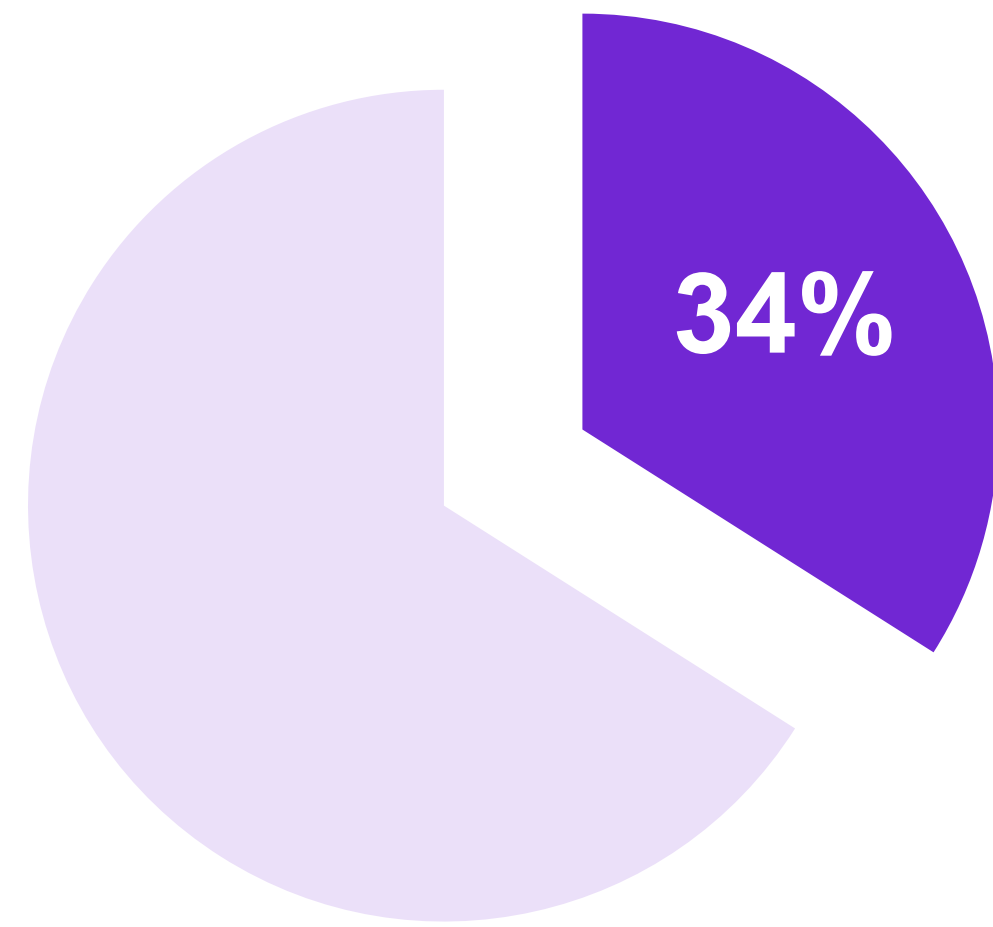


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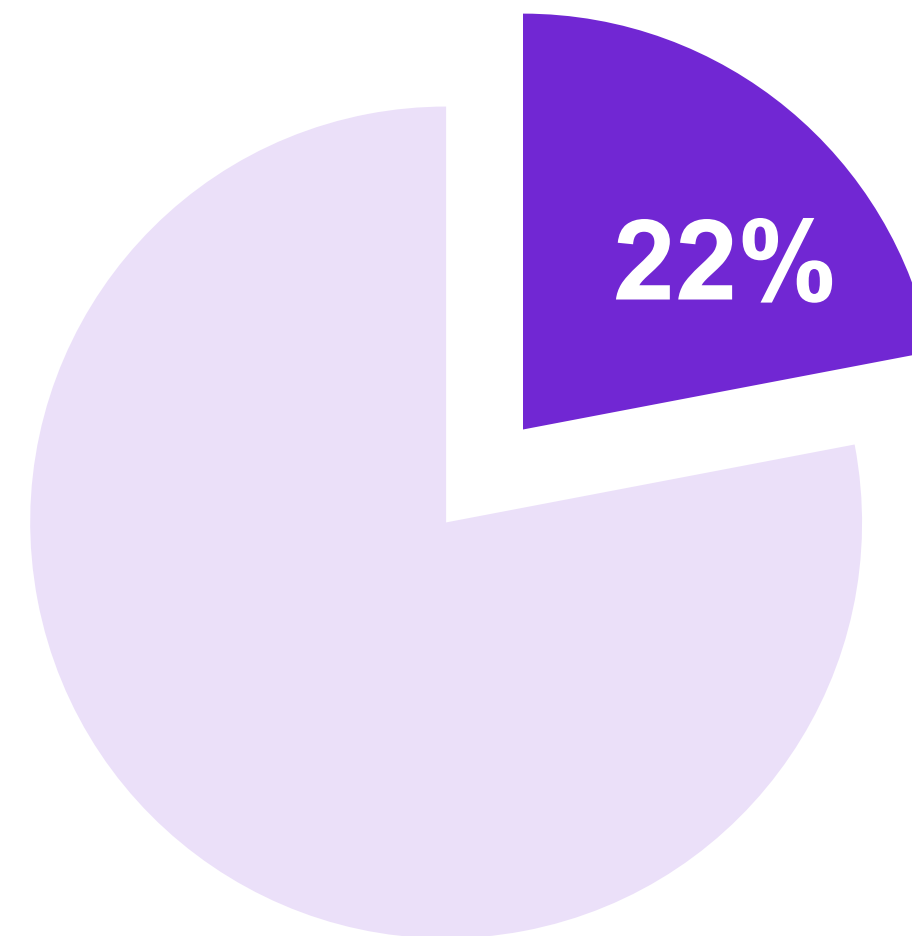


Stayed the Same

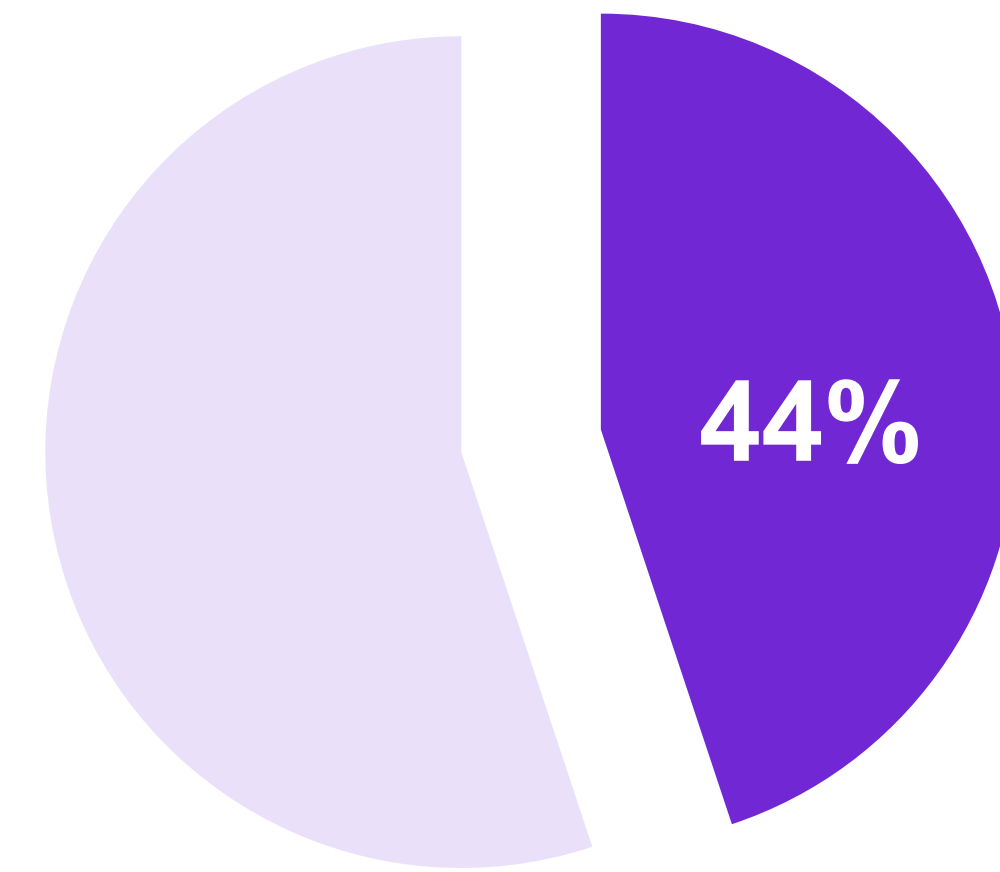
Q6C: When compared to 2018, did the number of nights you stayed at paid accommodations increase, decrease, or stay the same?



Increased

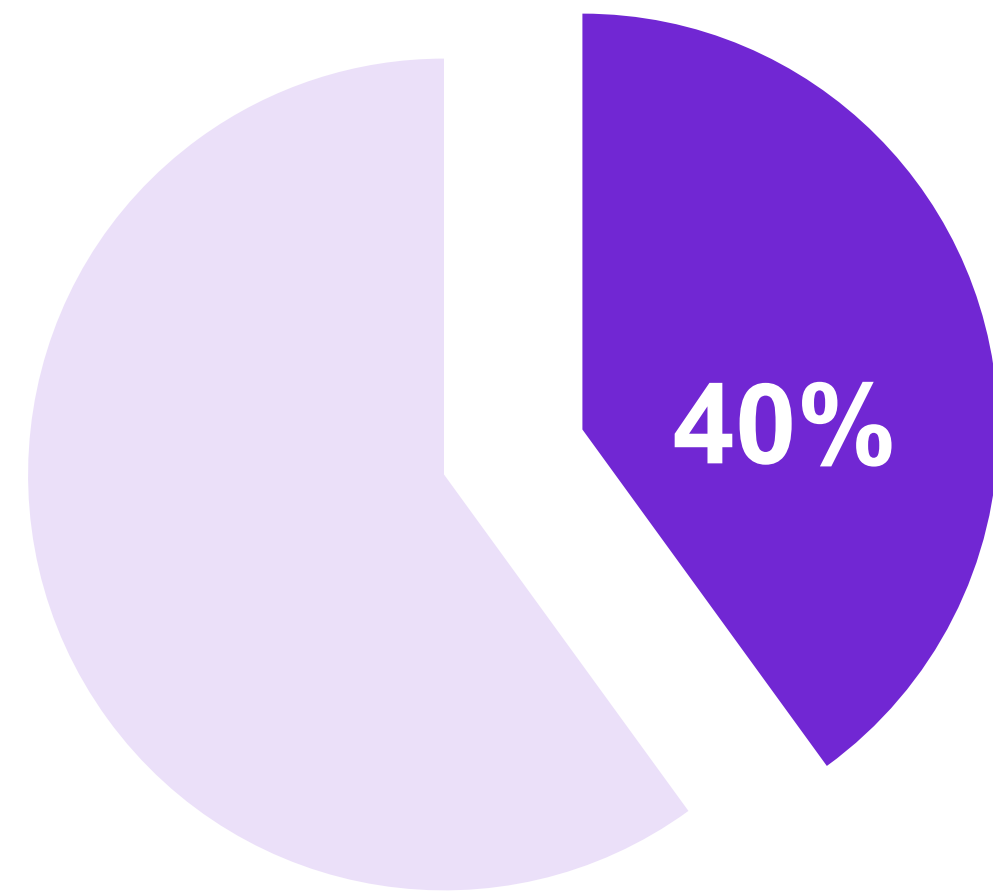


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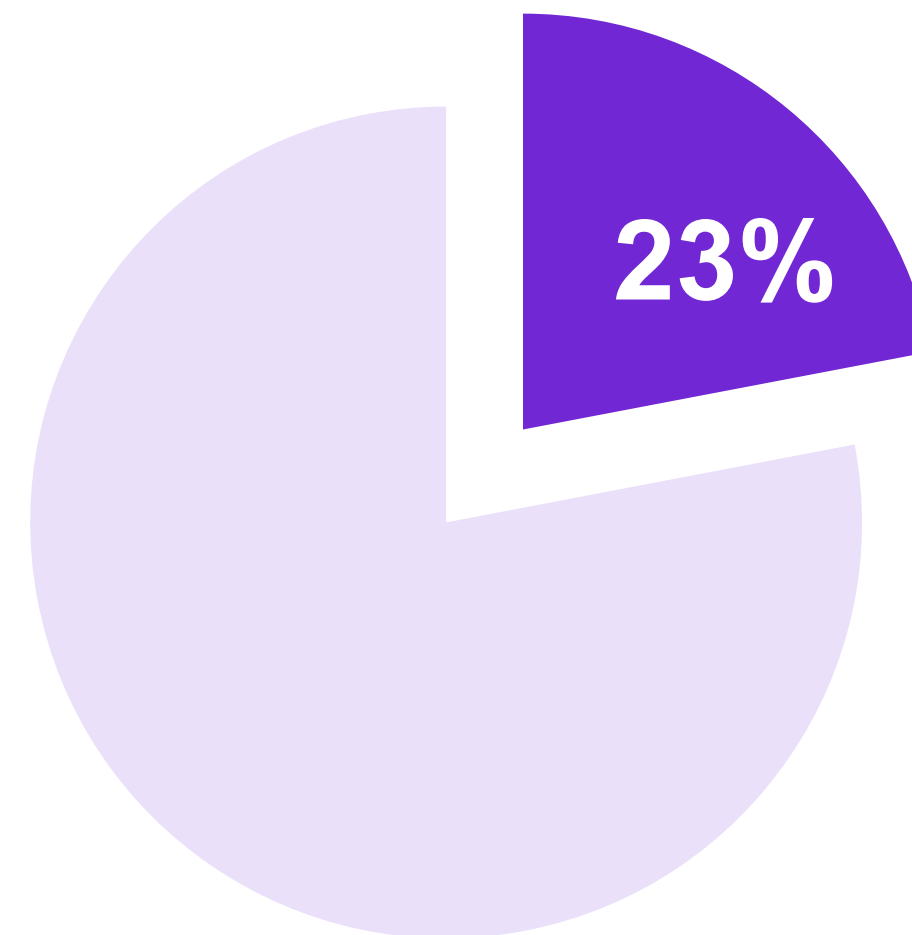


Stayed the Same

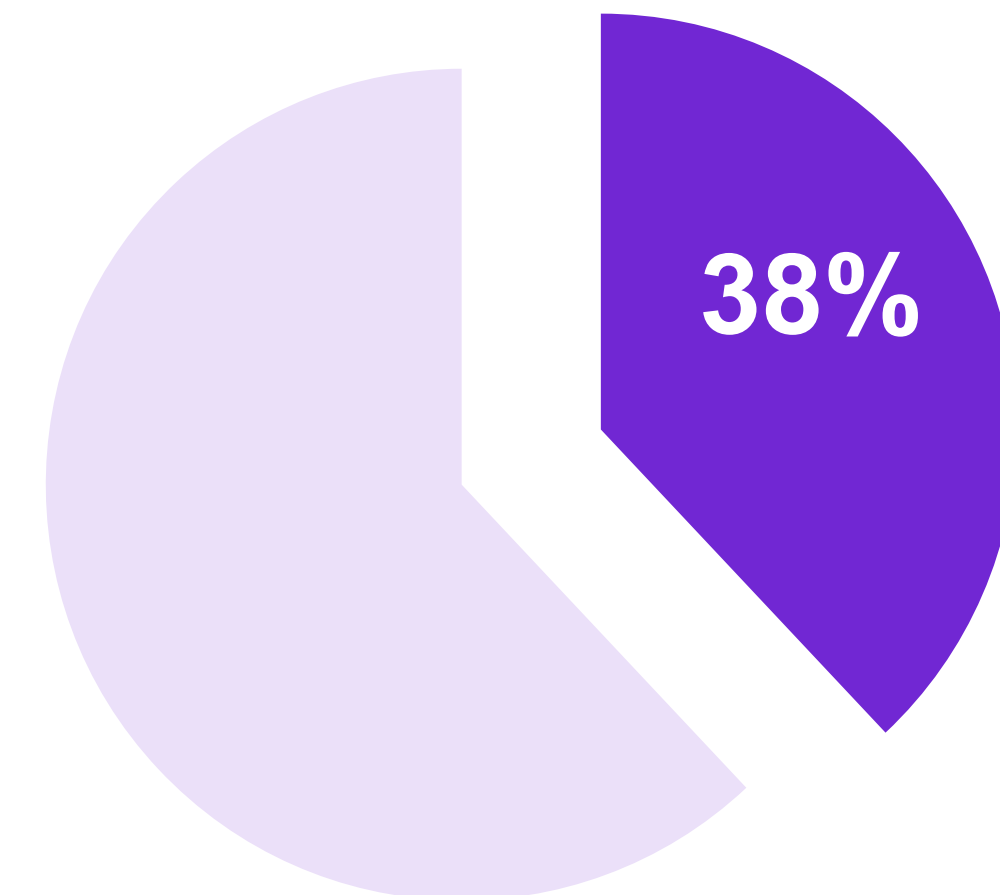
Q6D: When compared to 2018, did the amount spent on leisure trips increase, decrease, or stay the same?



Increased



Decreased



Stayed the Same

Q7: When choosing a travel destination, how important are the following factors? (Part I)

Factors	Very Important	Somewhat Important	Somewhat not Important	Not Important	Does not Matter
Cost/Value for Money	53%	35%	7%	2%	2%
Climate	39%	42%	11%	4%	4%
Proximity to your home	11%	19%	22%	27%	21%
Political climate	28%	41%	16%	8%	7%
Reputation for diversity and welcoming to the LGBTQ2 community	19%	30%	16%	16%	20%
LGBTQ2 culture and history	11%	23%	20%	20%	25%

Q7: When choosing a travel destination, how important are the following factors? (Part II)

Factors	Very Important	Somewhat Important	Somewhat not Important	Not Important	Does not Matter
Advertised by LGBTQ2 sources	9%	20%	19%	24%	28%
Availability of working holiday visa	11%	16%	13%	25%	34%
Availability of youth exchange program	9%	11%	12%	28%	39%
Safety	59%	30%	6%	2%	2%
Bucket list destination	24%	42%	15%	10%	9%
Having friends and family at the destination	18%	26%	20%	19%	16%
Recommended by family and friends	16%	43%	23%	9%	9%

N=1455

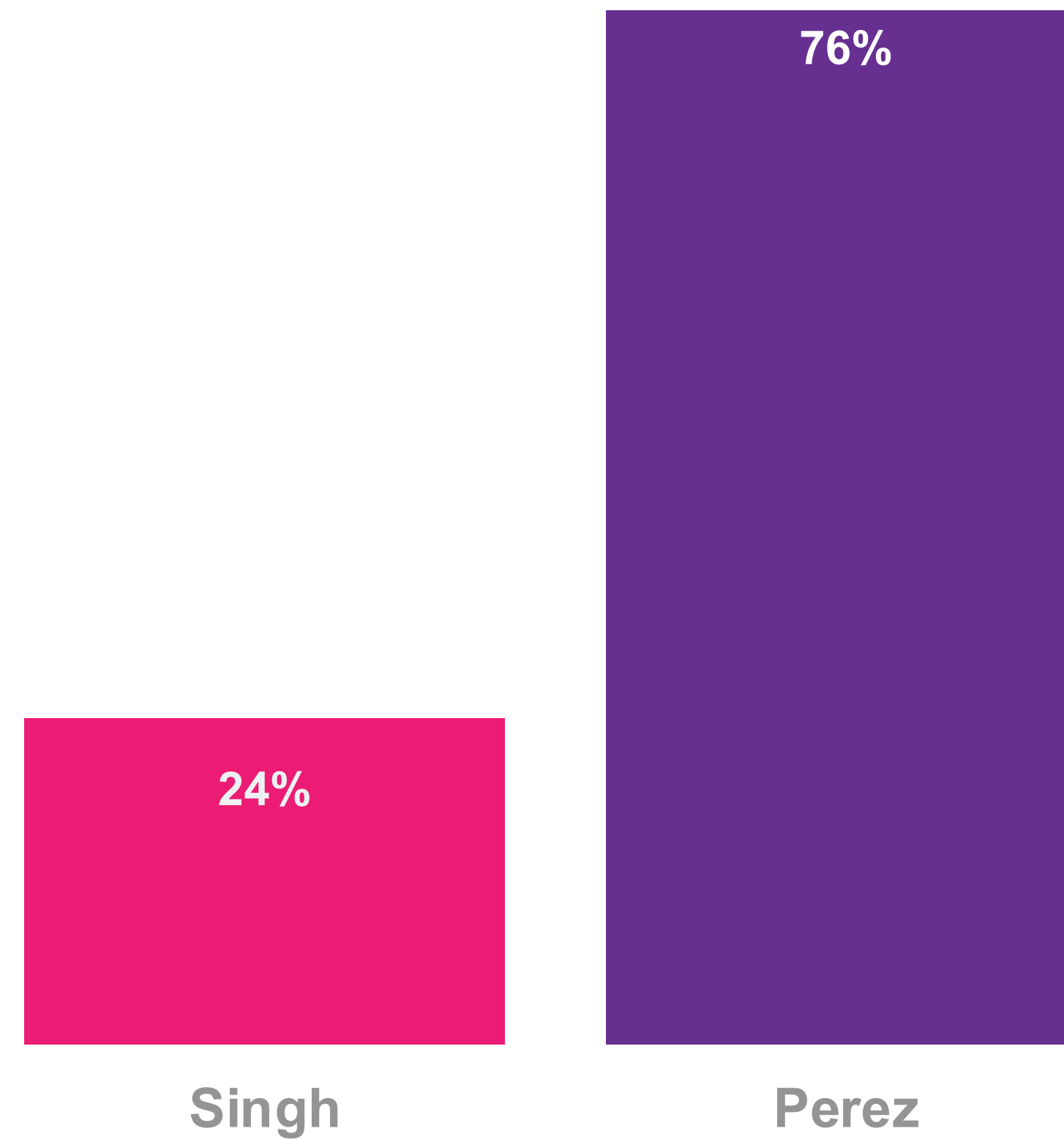
Q8: When thinking about leisure activities, which of the following factors are most important to you? (Part I)

Factors	Very Important	Somewhat Important	Somewhat not Important	Not Important	Does not Matter
Nature-related Outdoor Activities	27%	37%	18%	12%	7%
Shopping Activities	17%	35%	27%	14%	7%
Food and Dining	41%	40%	13%	4%	2%
Arts and Culture	26%	44%	19%	7%	5%
Popular Tourist Activities	28%	44%	18%	6%	4%
Attend fests and festivals	16%	36%	26%	15%	8%

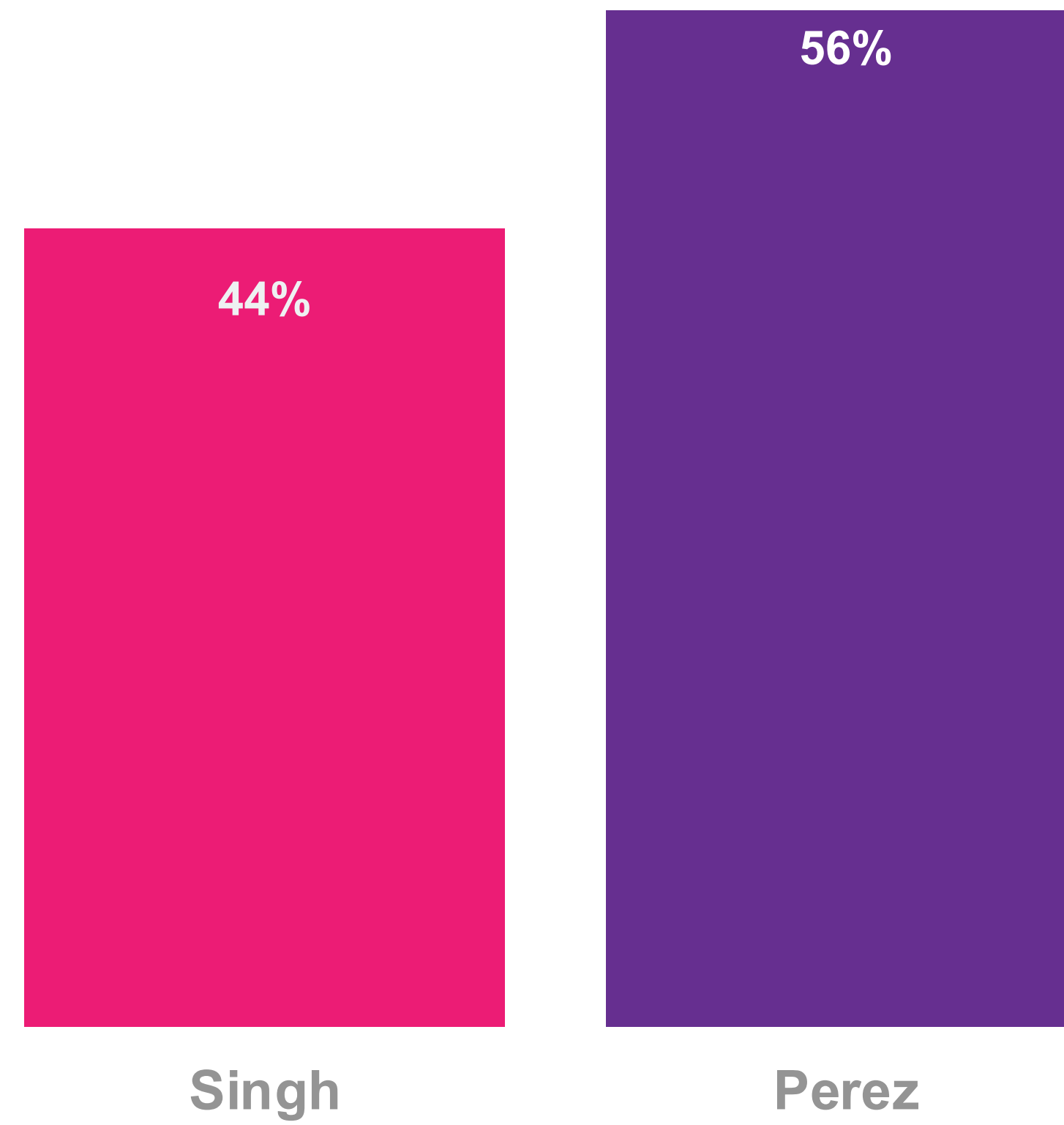
Q8: When thinking about leisure activities, which of the following factors are most important to you? (Part II)

Factors	Very Important	Somewhat Important	Somewhat not Important	Not Important	Does not Matter
Attend sporting events and games	10%	23%	25%	26%	16%
Attend LGBTQ2 events, fests, and parades	10%	20%	22%	25%	23%
Attend parties	10%	22%	27%	27%	14%
Visit family and friends	21%	37%	21%	13%	8%
Wellness activities focused on mental health, meditation, massages, etc.	14%	25%	29%	21%	11%

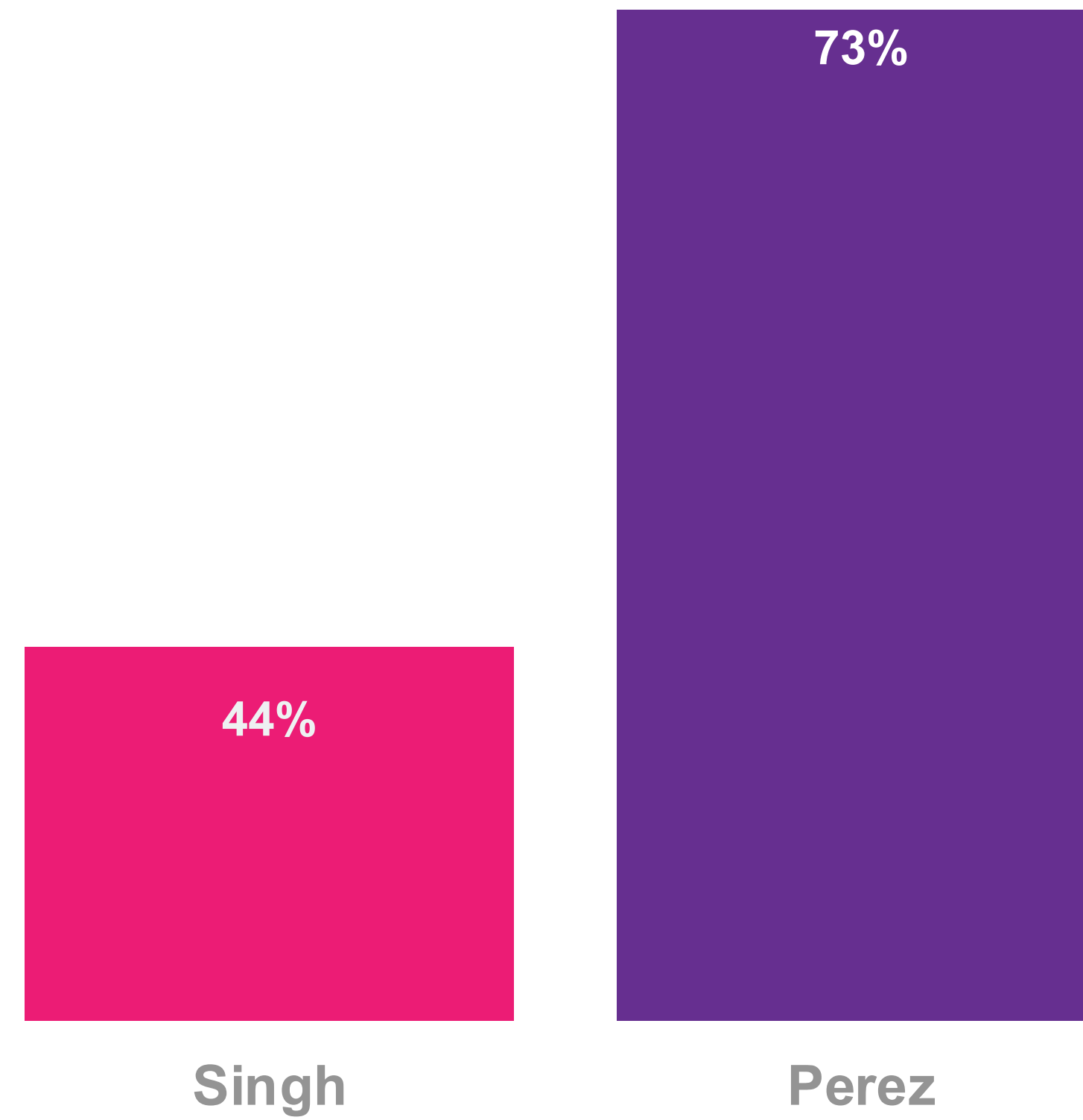
Q9: Singh and Perez have distinct travel preferences. Singh specifically plans leisure trips to places where they can explore LGBTQ2 history and culture. Perez on the other hand, travels to a variety of destinations but makes sure that their leisure trips are at destinations with a LGBTQ2-friendly reputation. Would you say you are more like?



Q10: Singh and Perez have distinct travel preferences. Singh likes to go on leisure trips to primarily destress and relax. Perez on the other hand likes to go on leisure trips to specifically explore different places and cultures. Would you say you are more like?



Q11: Singh and Perez have distinct travel preferences. Singh will only travel to places recommended by their friends and family. Perez on the other hand, will book leisure trips to destinations that offer good value for money, regardless of recommendations. Would you say you are more like?



**Q12: When thinking about leisure accommodations, which of the following factors are most important to you?
(Part I)**

Factors	Very Important	Somewhat Important	Somewhat not Important	Not Important	Does not Matter
Cost/Minimizing Expenditure	46%	40%	10%	3%	2%
Staying in specific hotel chains	11%	27%	25%	25%	12%
Staying in local bed and breakfasts or vacation rentals	14%	33%	28%	17%	8%
Staying in five-star accommodation/ brand of accommodation	12%	29%	28%	21%	10%
Location of property	16%	29%	21%	21%	12%
Proximity to tourist attractions	24%	50%	17%	5%	3%

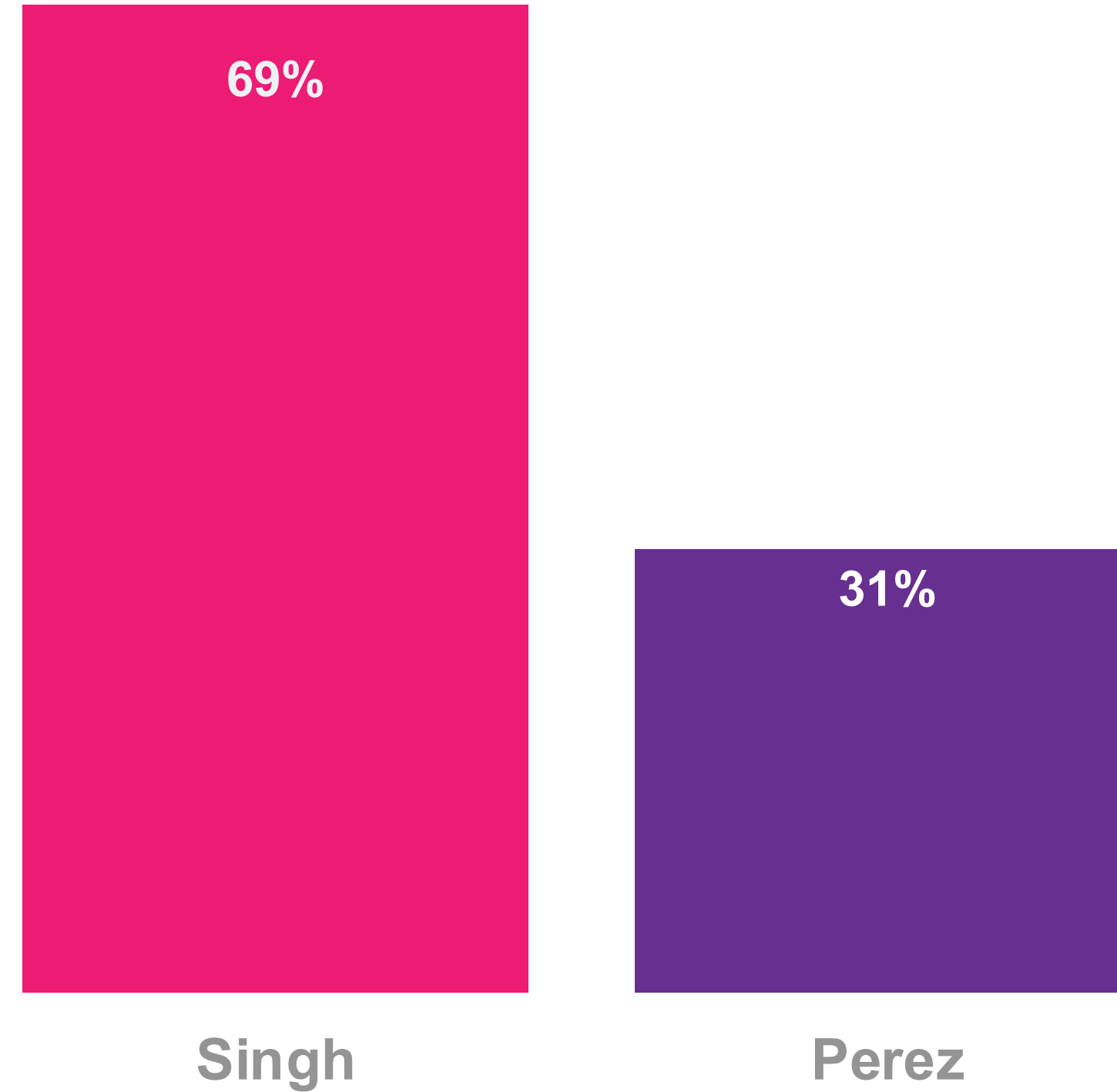
**Q12: When thinking about leisure accommodations, which of the following factors are most important to you?
(Part II)**

Factors	Very Important	Somewhat Important	Somewhat not Important	Not Important	Does not Matter
Closeness to LGBTQ2 neighborhoods	9%	17%	23%	28%	23%
LGBTQ2 friendly	18%	29%	18%	18%	17%
Member of LGBTQ2 organization/ “LGBTQ2 approved”	10%	18%	22%	27%	23%
Reviews on LGBTQ2 sites	11%	19%	19%	28%	23%
Amenities of accommodation	33%	51%	11%	3%	3%

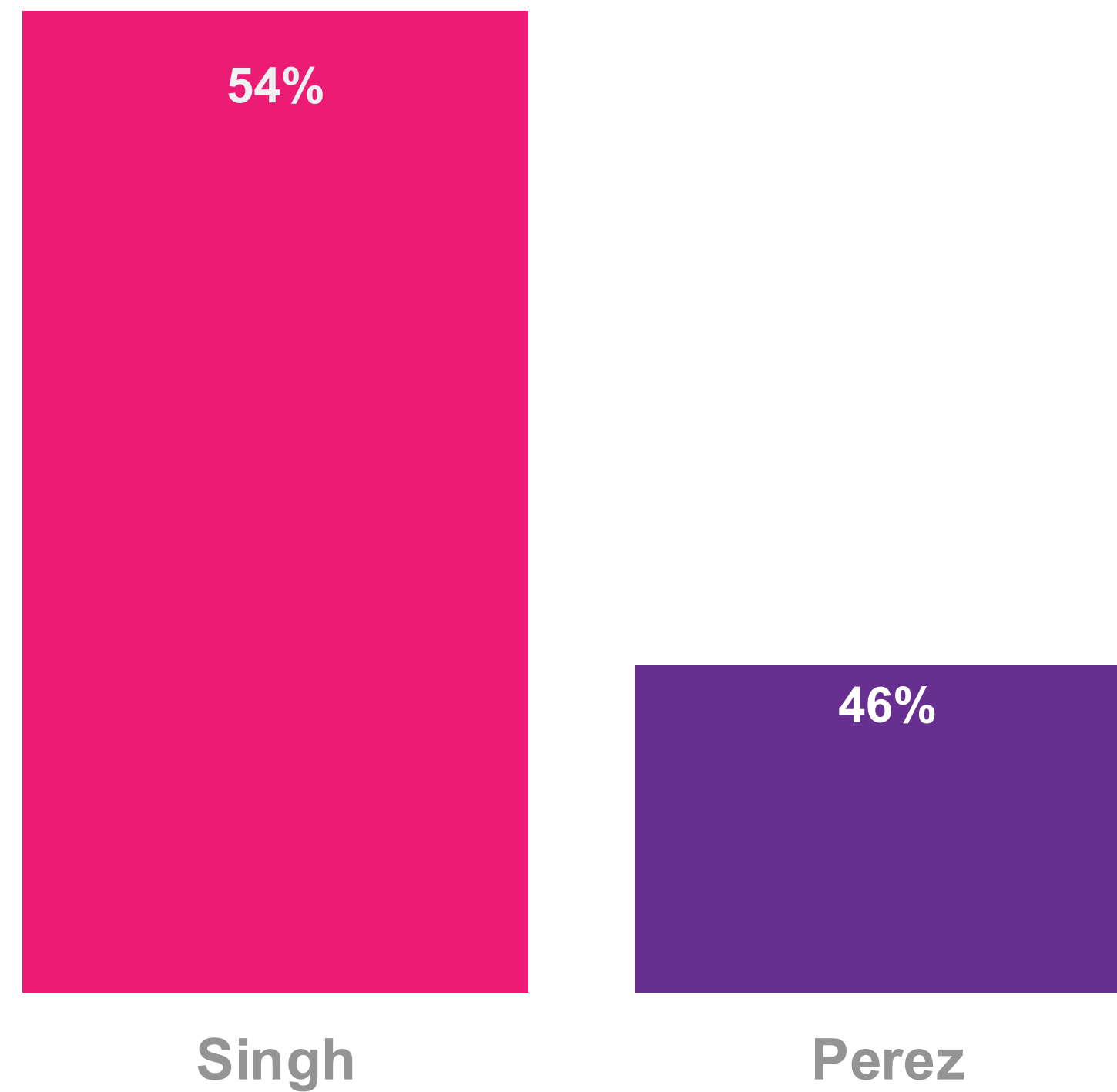
**Q12: When thinking about leisure accommodations, which of the following factors are most important to you?
(Part III)**

Factors	Very Important	Somewhat Important	Somewhat not Important	Not Important	Does not Matter
Part of a travel package	16%	30%	26%	18%	10%
Referral from family/friends	15%	40%	25%	13%	8%
Reviews and ratings	37%	45%	11%	4%	3%

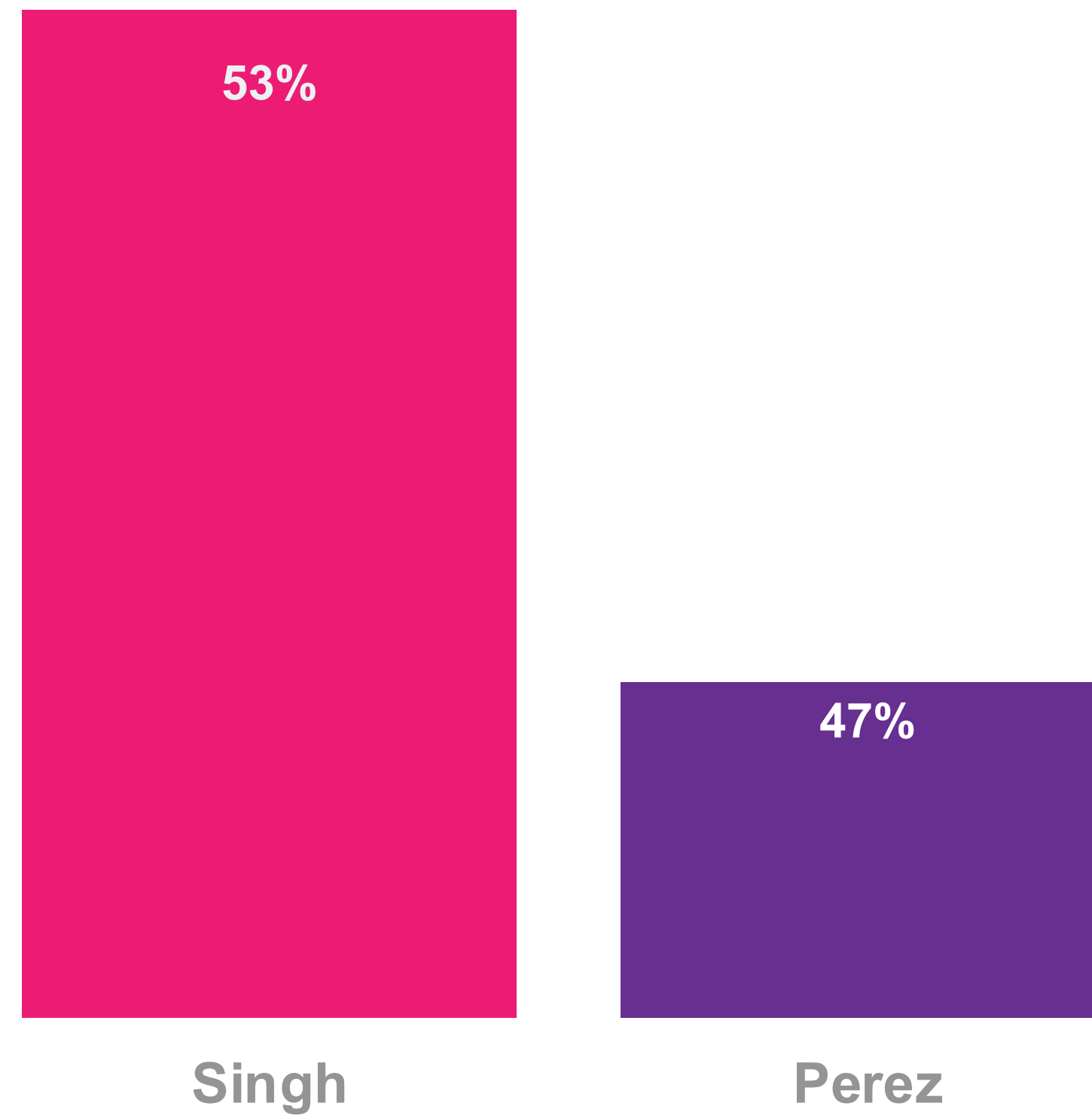
Q13: Singh and Perez have distinct travel preferences. When on leisure trips, Singh likes to minimize expenditure on accommodation, so will typically choose to stay at a place that fits their budget. Perez, on the other hand, prefers comfortable accommodations and will choose to stay at a place that offers greater comfort, regardless of price. Would you say you are more like?



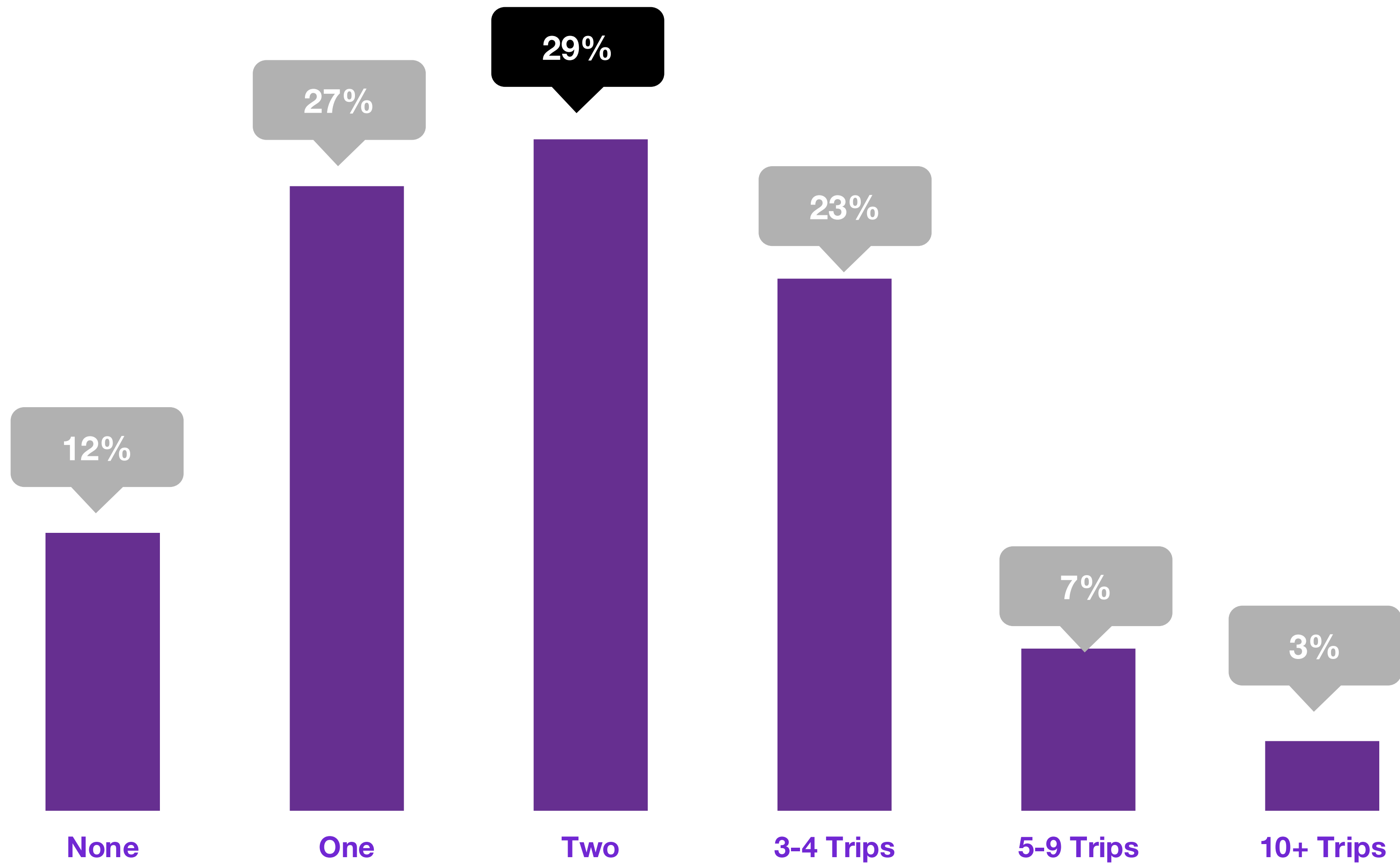
Q14: Singh and Perez have distinct travel preferences. Singh plans out leisure trips for the year at least six months in advance and builds out a detailed itinerary based on recommendations by popular blogs, friends and family. Perez typically plans leisure trips no more than two weeks in advance, may scan through some blogs for recommendations, but will mostly decide what to do when they get to their travel destinations. Would you say you are more like?



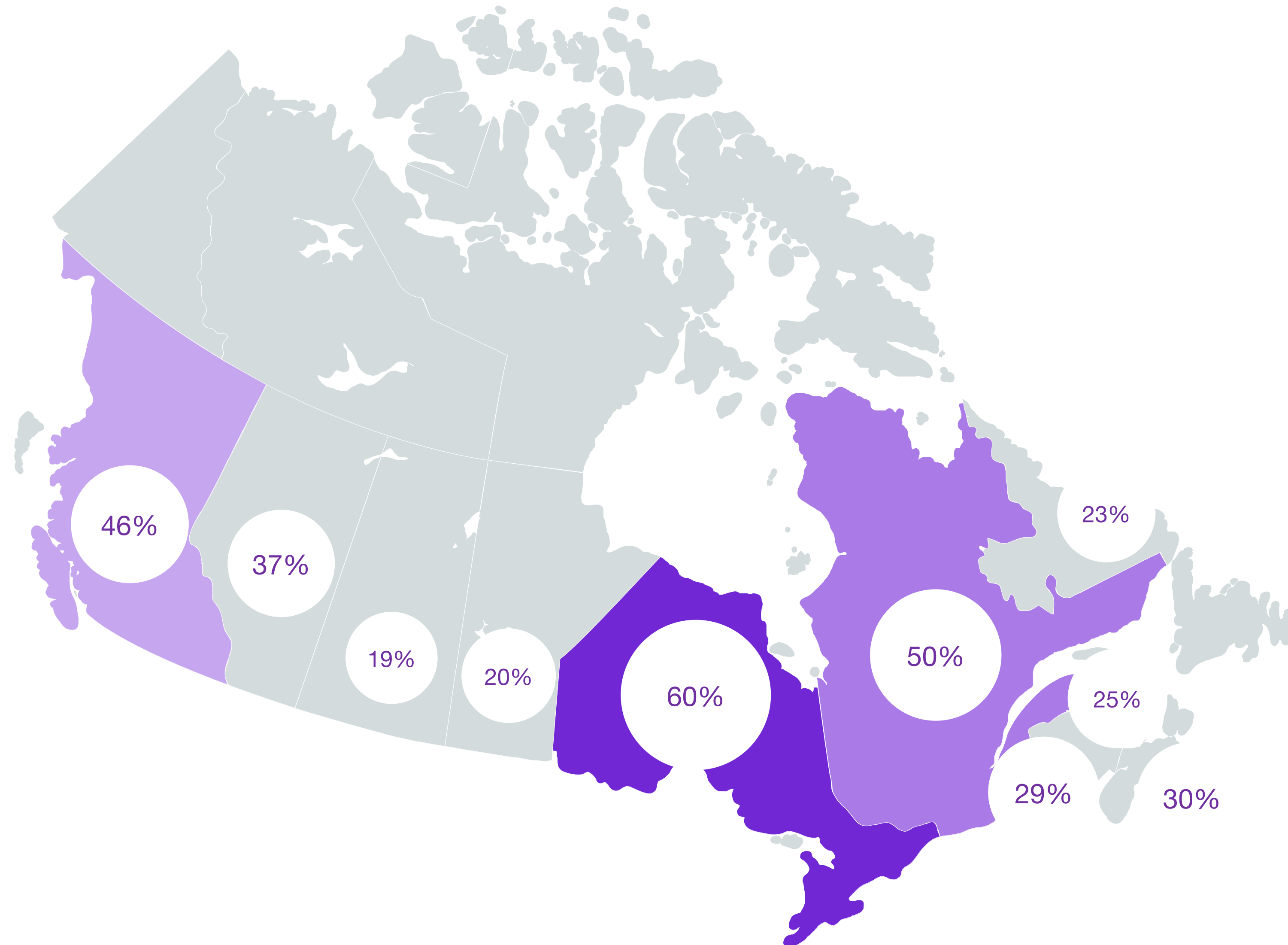
Q15: Singh and Perez have distinct travel preferences. Both spend the same amount of money on accommodation. Singh holds various loyalty memberships, so prefers to stay in specific hotel chains when travelling on vacation. Perez on the other hand, prefers to stay in local bed and breakfasts or local homes via vacation rental services such as Airbnb. Would you say you are more like?



Q16: Thinking about your leisure travel trips in 2019, how many would you say were to places within Canada?



Q17: Thinking about your leisure travel trips in 2019, which of these Canadian provinces/territories did you travel to?



Q17. Continued - Most travelers take leisure trips in their home provinces

Destination Provinces	Home Province									
	B.C.	Alberta	Saskatchewan	Manitoba	Ontario	Quebec	New Brunswick	Nova Scotia	P.E.I.	Newfoundland and Labrador
B.C.	39%	23%	4%	4%	18%	10%	1%	2%	0%	0%
Alberta	22%	41%	7%	5%	16%	6%	1%	3%	0%	0%
Saskatchewan	18%	24%	24%	11%	17%	3%	0%	3%	0%	0%
Manitoba	12%	13%	8%	32%	24%	8%	0%	4%	0%	0%
Ontario	6%	5%	1%	2%	57%	23%	1%	3%	0%	1%
Quebec	4%	3%	1%	1%	35%	51%	2%	4%	0%	1%
New Brunswick	9%	7%	3%	3%	21%	30%	9%	18%	2%	0%
Nova Scotia	10%	8%	2%	2%	28%	18%	9%	22%	2%	0%
P.E.I.	9%	3%	3%	37%	29%	7%	12%	0%	0%	0%
Newfoundland and Labrador	16%	9%	9%	9%	29%	14%	0%	5%	2%	7%

Q17b: Most Mentions per Province (Part I)

City	Province	Percentage Visited
Fredericton	New Brunswick	55%
Moncton	New Brunswick	51%
Charlottetown	P.E.I.	79%
Summerside	P.E.I.	44%
St. John's	Newfoundland and Labrador	54%
Corner Brook	Newfoundland and Labrador	32%

N(NB)=122,
N(PEI)=77,
N(NF)=56

Q17b: Most Mentions per Province (Part II)

City	Province	Percentage Visited
Halifax	Nova Scotia	74%
Cape Breton	Nova Scotia	33%
Montreal	Quebec	62%
Quebec City	Quebec	46%
Toronto	Ontario	47%
Ottawa	Ontario	26%

N(NS)=129,
N(QC)=446,
N(ON)=599

Q17b: Most Mentions per Province (Part III)

City	Province	Percentage Visited
Winnipeg	Manitoba	74%
Brandon	Manitoba	21%
Saskatoon	Saskatchewan	57%
Regina	Saskatchewan	48%
Calgary	Alberta	63%
Edmonton	Alberta	49%

N(MB)=76,
N(SK)=89,
N(AB)=243

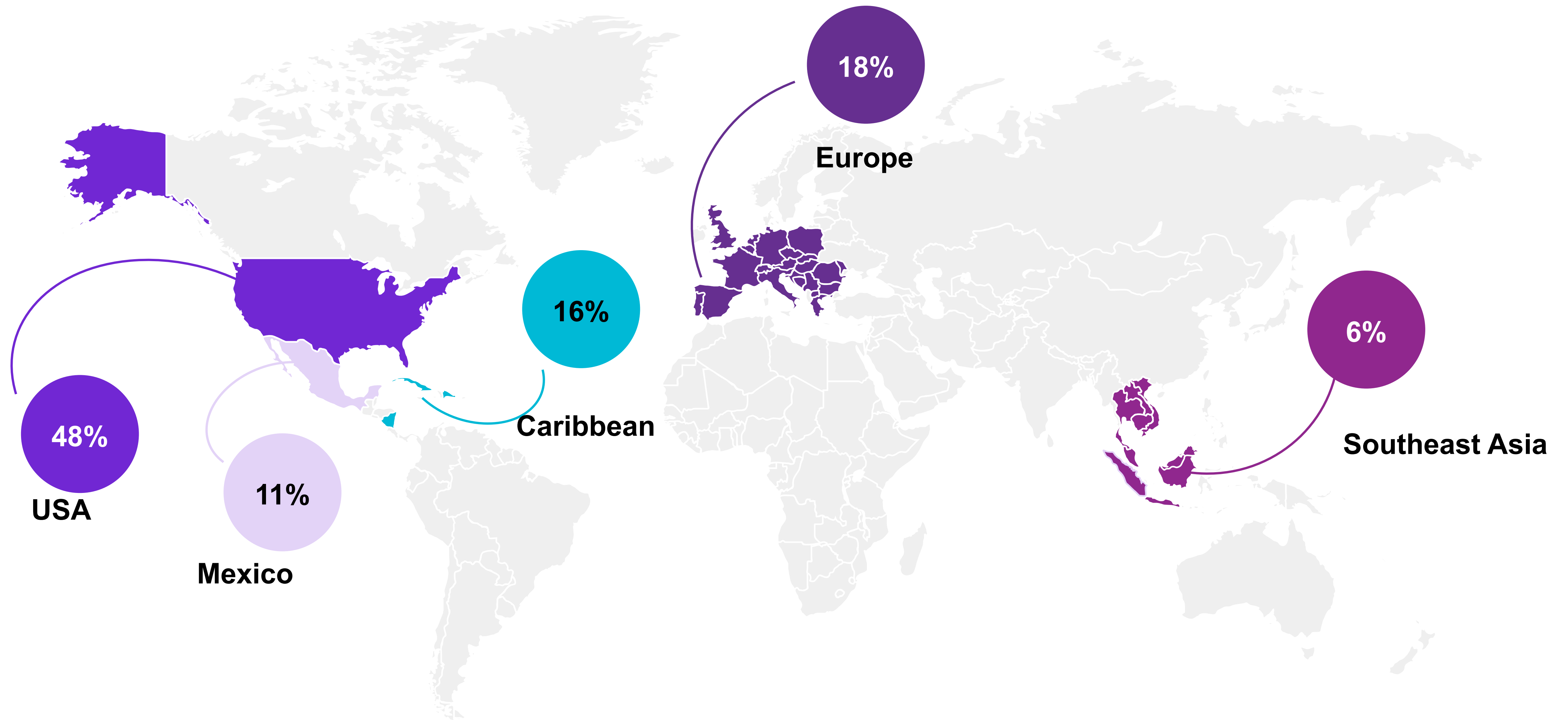
Q17b: Most Mentions per Province (Part IV)

City	Province	Percentage Visited
Vancouver	B.C.	59%
Victoria	B.C.	27%
Whitehorse	Yukon	89%
Yellowknife	N.W.T.	88%
Iqaluit	Nunavut	71%

Q18: Thinking about your leisure travel trips to Canadian destinations in 2019, how many trips would you say were primarily in the following types of destinations?

Destination Type	None	Once	Twice	Three to Four trips	Five to Nine trips	Ten trips or more
Major metropolitan city	21%	39%	23%	23%	3%	1%
Tier II city	37%	32%	20%	9%	1%	1%
Beach town	53%	27%	12%	5%	2%	1%
National parks	45%	30%	14%	7%	2%	1%
Countryside/ Cottage country	43%	29%	15%	9%	4%	1%

Q19: You indicated that your leisure travel in 2019 was not within Canada. Where did you take your vacation, if at all?



Q20: You indicated that you did not take any leisure trips in Canada in 2019. From the list below please rank the most to least important reasons why you did not take any leisure trips in Canada in 2019

Reason	Most important	Somewhat important	Neutral	Somewhat not Important	Least Important
Cost	43%	30%	17%	10%	1%
Climate	25%	45%	23%	4%	3%
No interest in spending holidays in Canada	16%	17%	37%	21%	8%
Been to everywhere in Canada I want to go to	6%	7%	18%	57%	12%
Other	41%	9%	9%	12%	29%

Q21: When typically planning a leisure travel trip, how often do you refer to the following sources? (Part I)

Source	Always	Sometimes	Never
Travel forums	18%	42%	40%
Travel blogs	19%	45%	36%
Instagram influencers	11%	29%	60%
Family	24%	62%	15%
Friends	26%	65%	9%
Government of Canada website	13%	43%	44%

Q21: When typically planning a leisure travel trip, how often do you refer to the following sources? (Part II)

Source	Always	Sometimes	Never
Travel agents	12%	38%	49%
Official tourism destination websites	23%	54%	23%
Hotel/airline brand site	22%	51%	27%
Other vacation rental sites	16%	52%	32%
LGBTQ2 travel sites	10%	30%	60%
LGBTQ2 general information sites	11%	29%	60%

Q21: When typically planning a leisure travel trip, how often do you refer to the following sources? (Part III)

Source	Always	Sometimes	Never
Travel magazines	12%	40%	48%
Travel shows	11%	36%	53%
Print and broadcast media	12%	48%	40%

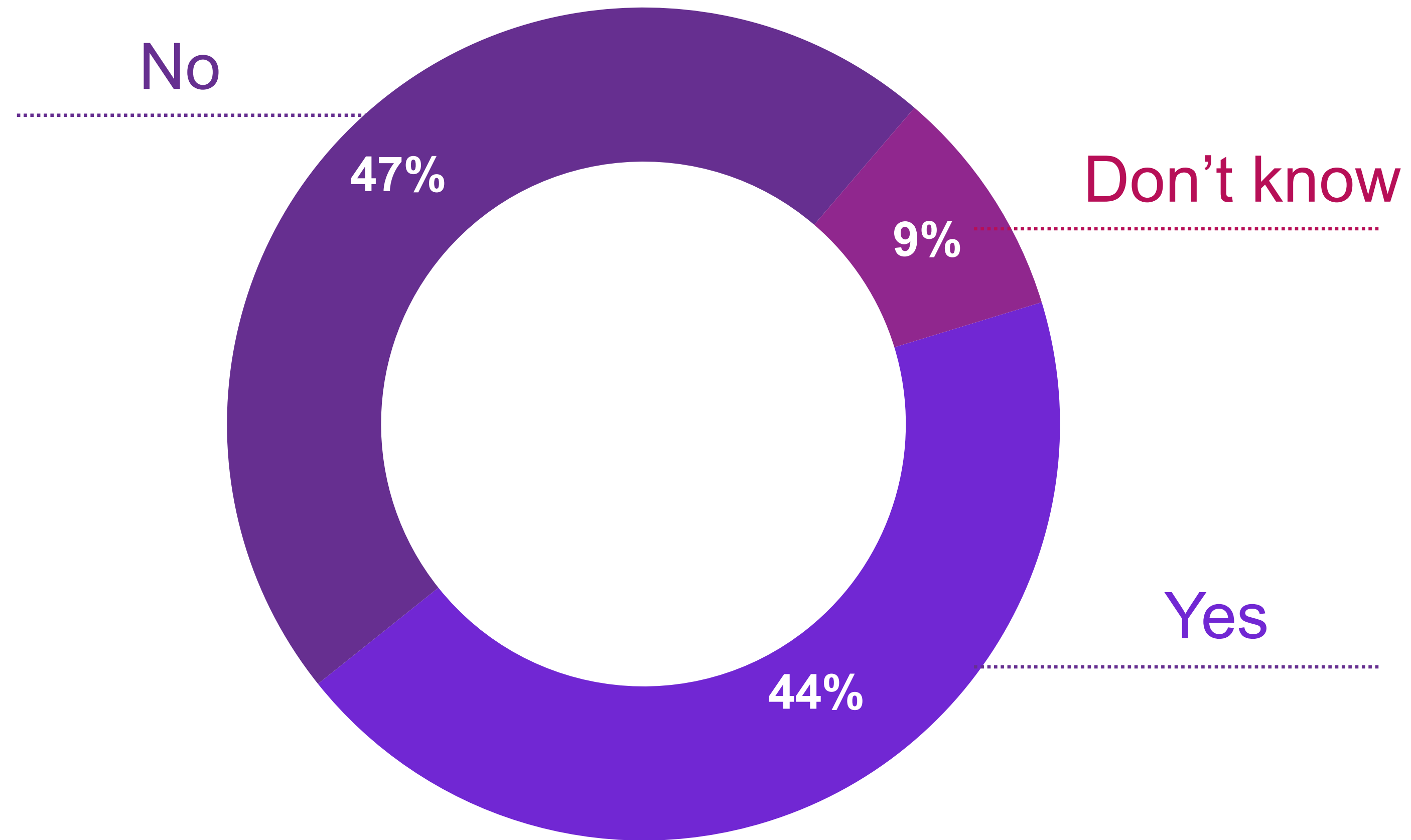
Q22: You indicated that you use a LGBTQ2 specific resource when planning leisure travel trips. Please indicate how often you use the following sources:

Source	Always	Sometimes	Never
LGBTQ2 influencers	26%	44%	29%
LGBTQ2 websites	18%	69%	14%
LGBTQ2 travel forums	19%	51%	31%
LGBTQ2 magazines	16%	49%	35%
LGBTQ2 media (print, TV, radio)	19%	49%	31%
LGBTQ2 apps	20%	42%	39%

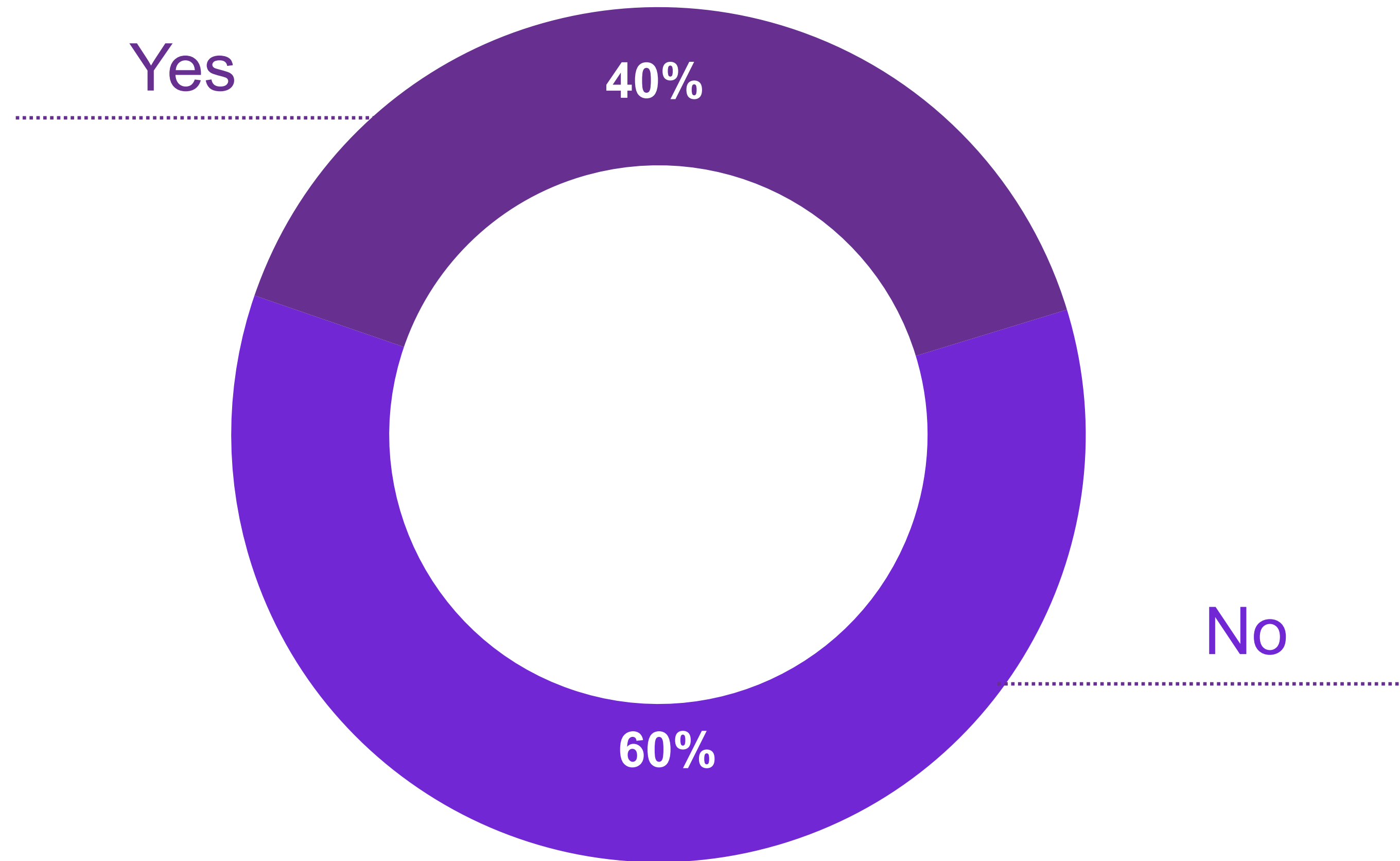
Q23: How do you generally make travel arrangements for your leisure travel trips?

Source	Always	Sometimes	Never
Travel agent	15%	35%	50%
Airline/hotel/vacation rental booking site	25%	61%	14%
Third-party travel aggregators (Expedia, Kayak, etc.)	21%	53%	26%
Telephone booking directly with airlines/hotels/local accommodations	11%	43%	46%
Travel planning services specializing in LGBTQ2 travel	9%	20%	71%
Tour operator	7%	30%	64%
Other	4%	4%	93%

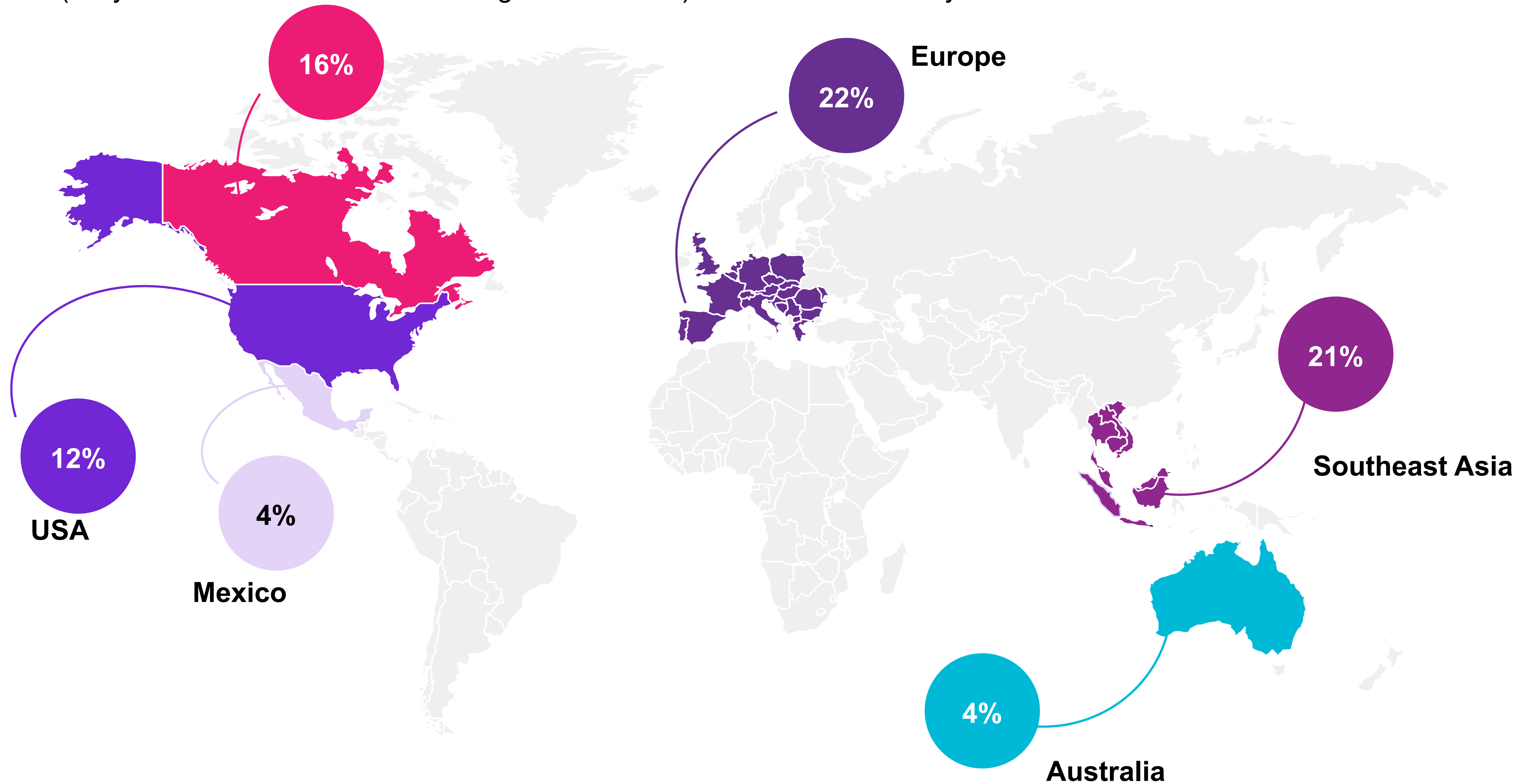
Q24: Are you aware of, or familiar with working holiday visa/youth exchange visas?
(Only asked to those between the ages of 19 to 35)



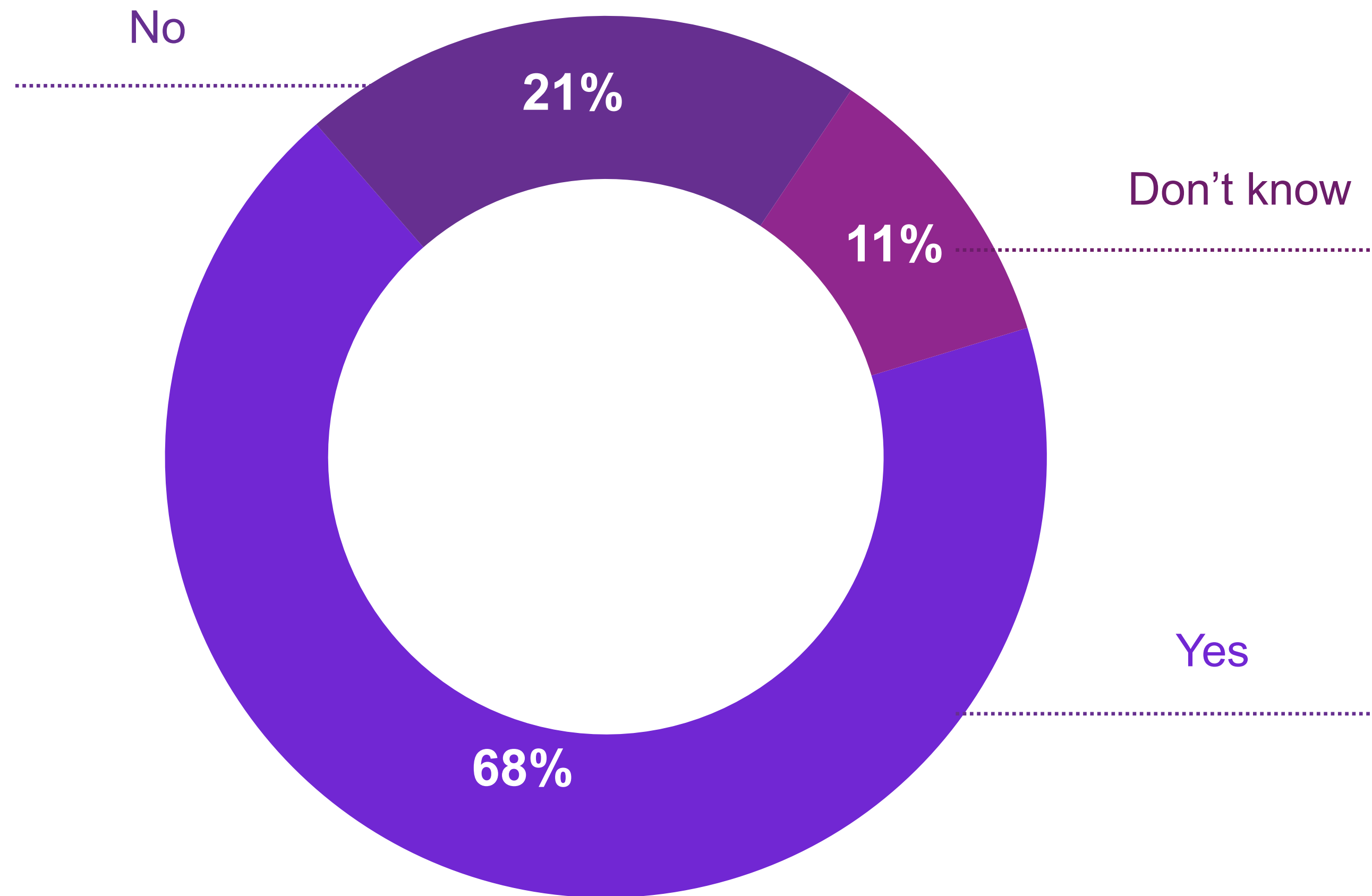
Q25: Have you travelled abroad under a working holiday/youth exchange visa?
(Only asked to those between the ages of 19 to 35) and that answered "yes" to Q. 24



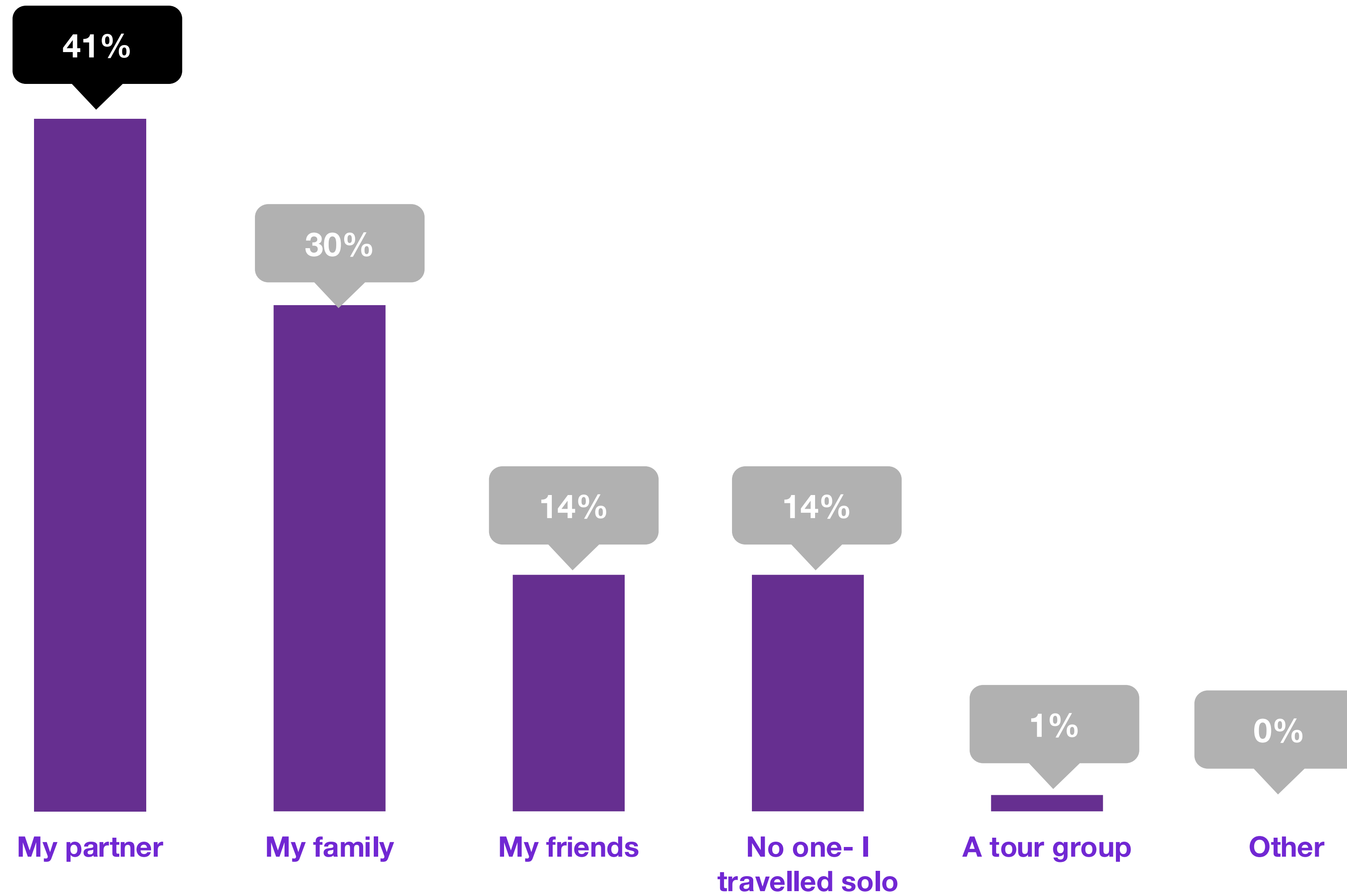
Q26: Which country/countries did you travel to under a working holiday/youth exchange visa?
(Only asked to those between the ages of 19 to 35) and that answered "yes" to Q. 25



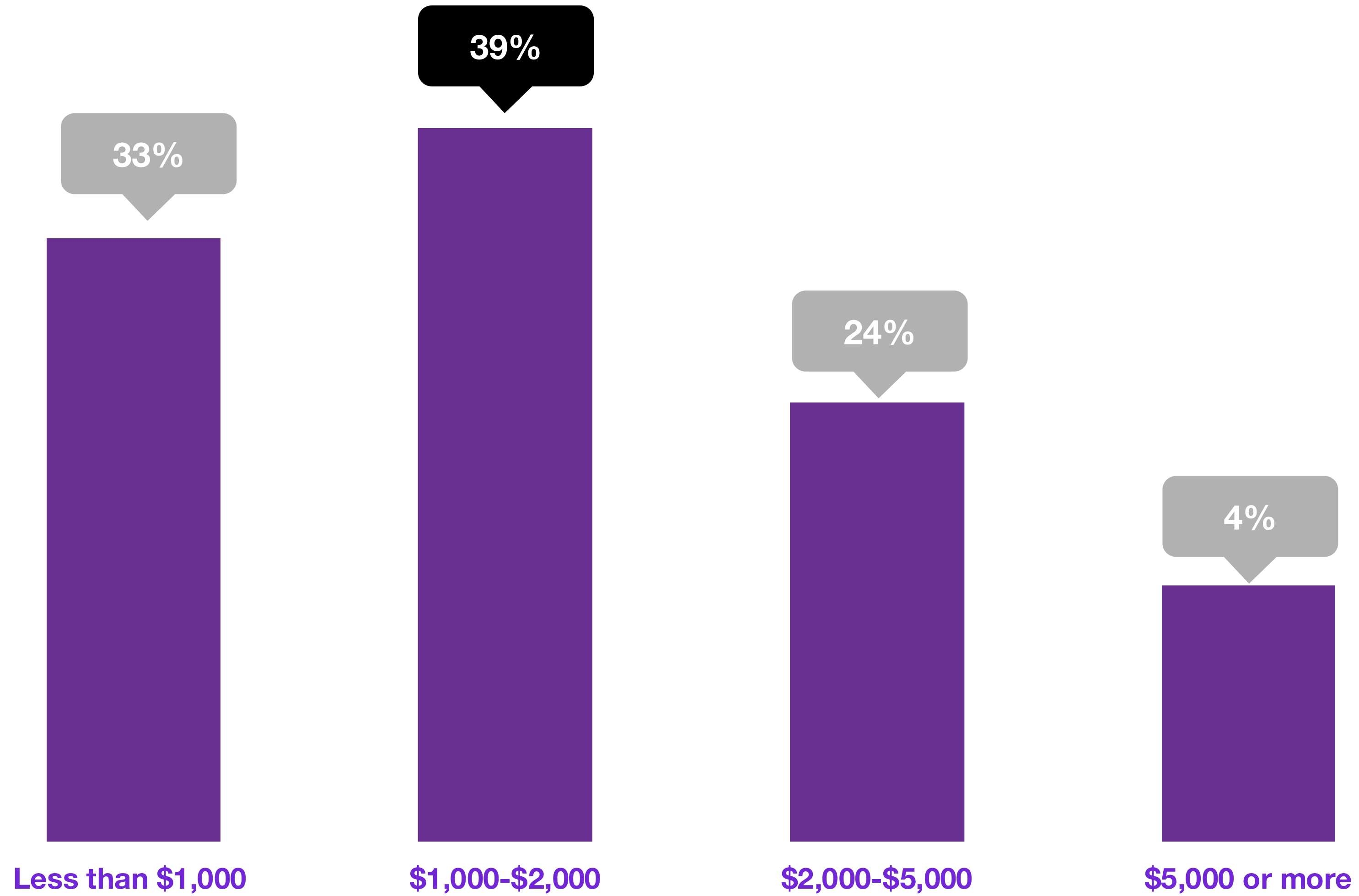
Q27: Would you consider travelling abroad under a working holiday/youth exchange visa in the future?
(Only asked to those between the ages of 19 to 35) and that answered "yes" to Q. 24



Q28: Thinking about your leisure travel trips generally, who did you most often travel with?



Q29: Thinking about your leisure travel trips generally, how much do you spend on every individual leisure travel trip?



Q30: On average, how often do you use these different modes of transport for leisure travel trips?

Transport	Always	Sometimes	Never
Commercial flight	39%	46%	15%
Train	8%	45%	47%
Bus	9%	40%	51%
Boat/Cruise	7%	31%	63%
Car	34%	54%	12%

Q31: On average per year, approximately how often do you stay at these accommodations during your leisure travel trips? (Part I)

Accomodation	Always	Sometimes	Never
Hotel chain	19%	68%	13%
Independent hotel	11%	61%	28%
Resort	13%	50%	37%
Local bed and breakfast	11%	44%	45%
Airbnb	12%	45%	42%

Q31: On average per year, approximately how often do you stay at these accommodations during your leisure travel trips? (Part I)

Accommodation	Always	Sometimes	Never
Other vacation rental	8%	41%	51%
Hostel	9%	29%	62%
Camping	10%	42%	48%
Friends/Family Homes	18%	47%	25%

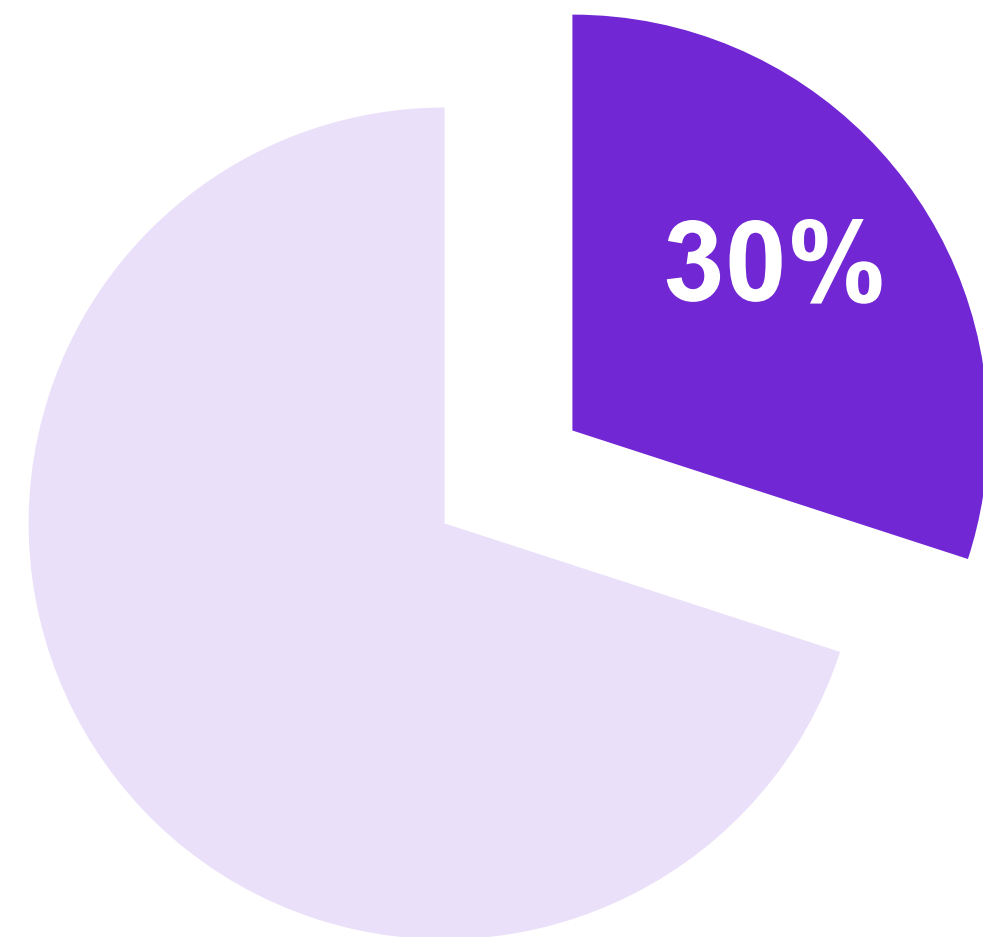
Q32: Typically, how often do you engage in the following activities during your leisure travel trips? (Part I)

Activity	Always	Sometimes	Never
Nature related activities	24%	55%	21%
Shopping activities	29%	58%	13%
Food and dining	56%	39%	6%
Arts and Culture	27%%	59%	14%
Popular tourist attractions	35%	57%	8%
Attend fests and festivals	15%	63%	22%

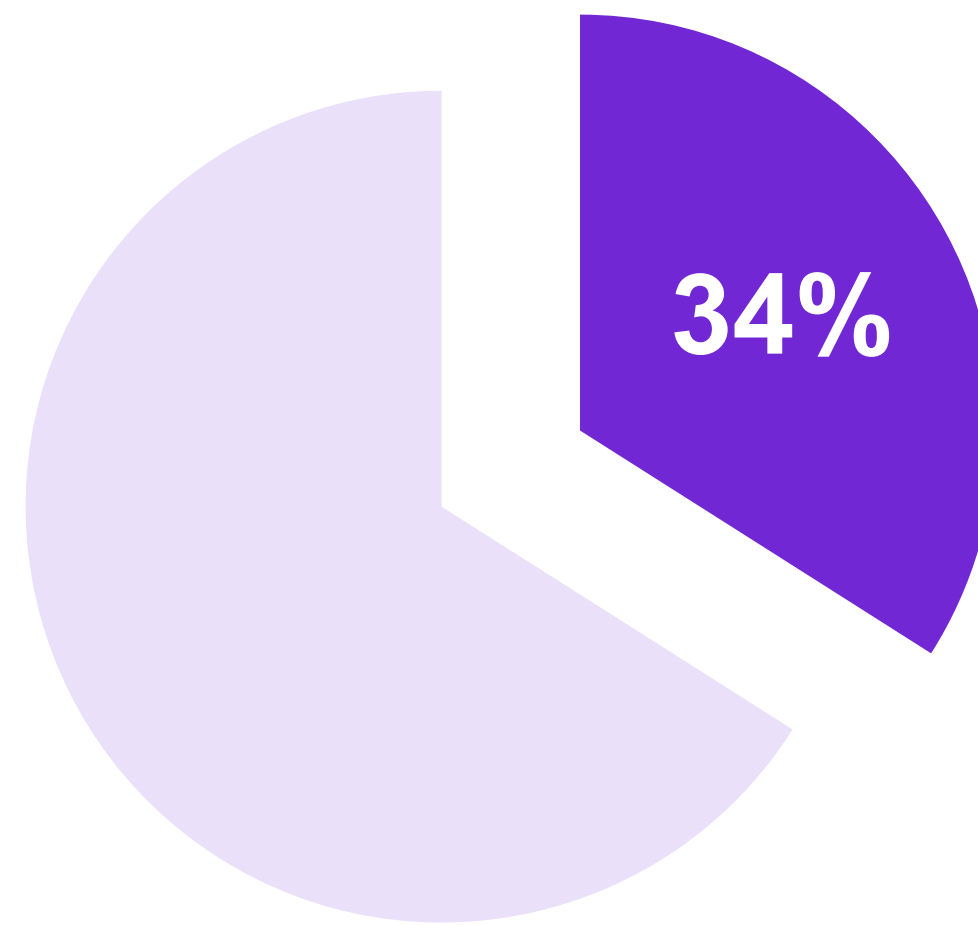
Q32: Typically, how often do you engage in the following activities during your leisure travel trips? (Part II)

Activity	Always	Sometimes	Never
Attend sporting events and games	10%	42%	48%
Attend LGBTQ2 events, fests, and parades	9%	37%	54%
Attend parties	11%	50%	39%
Visit family and friends	24%	63%	13%
Wellness activities focused on health, meditation, massages, etc.	10%	49%	41%

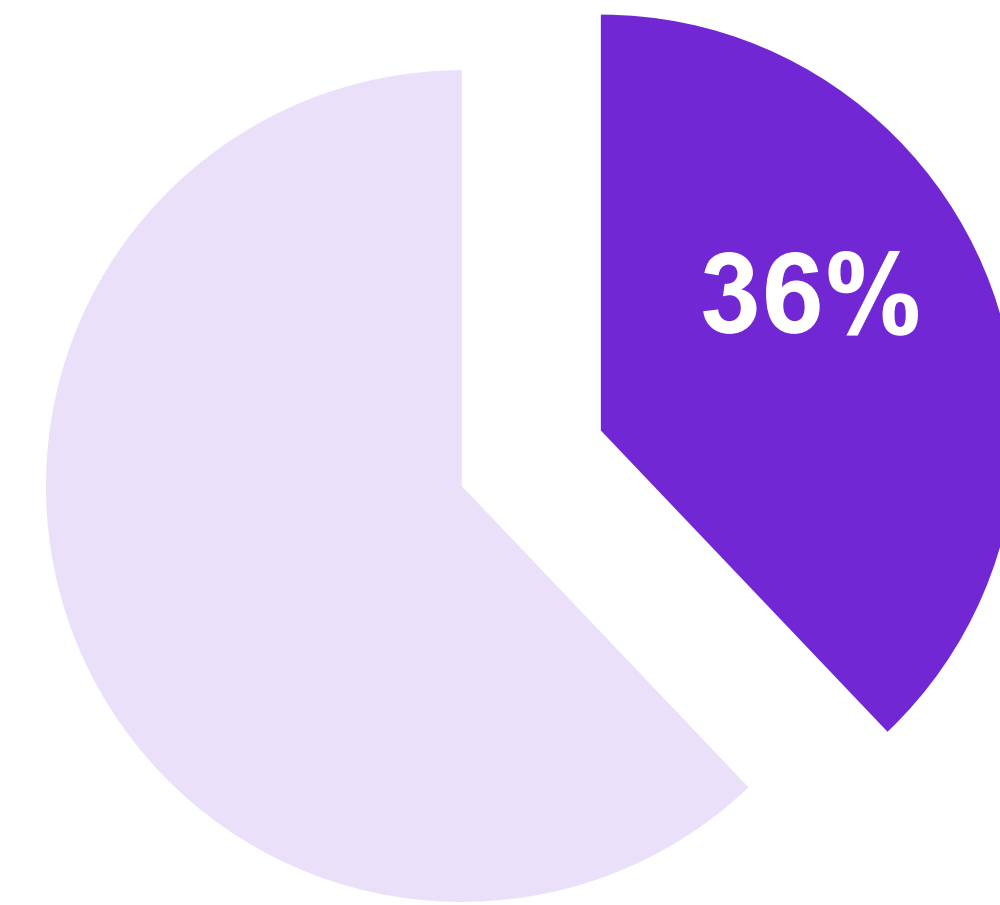
Q33A: When compared to 2019, do you expect your number of leisure trips to increase, decrease, or stay the same?



Increase

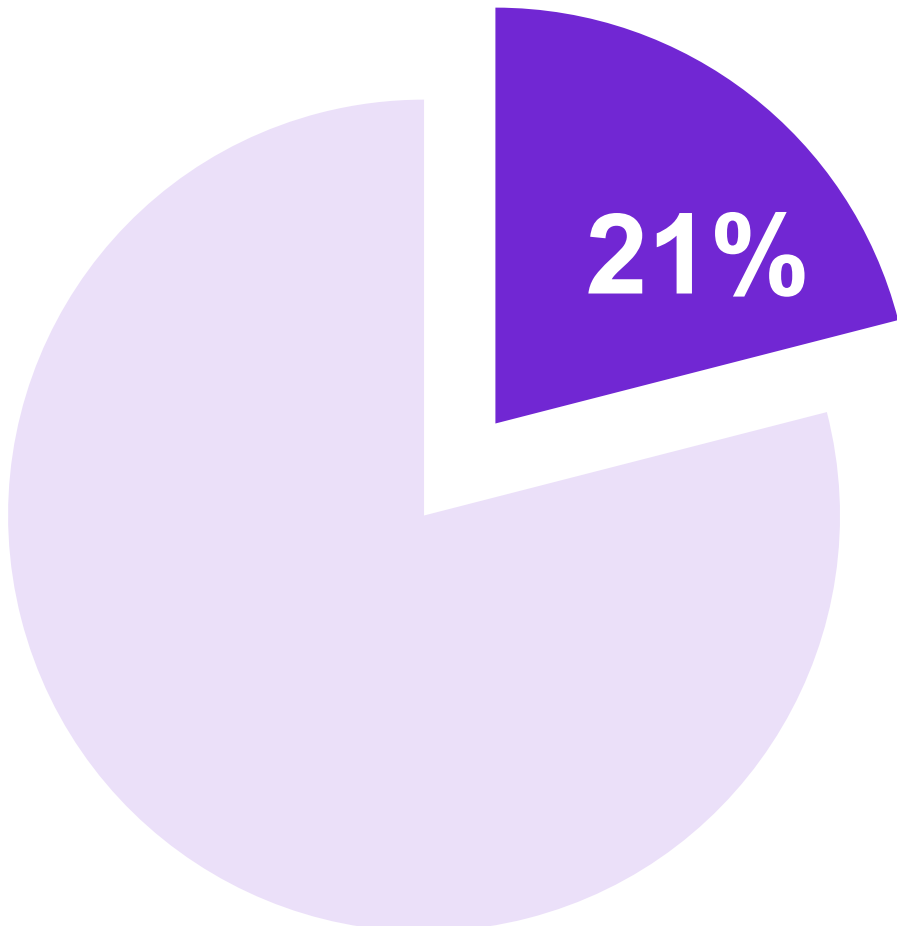


Decrease

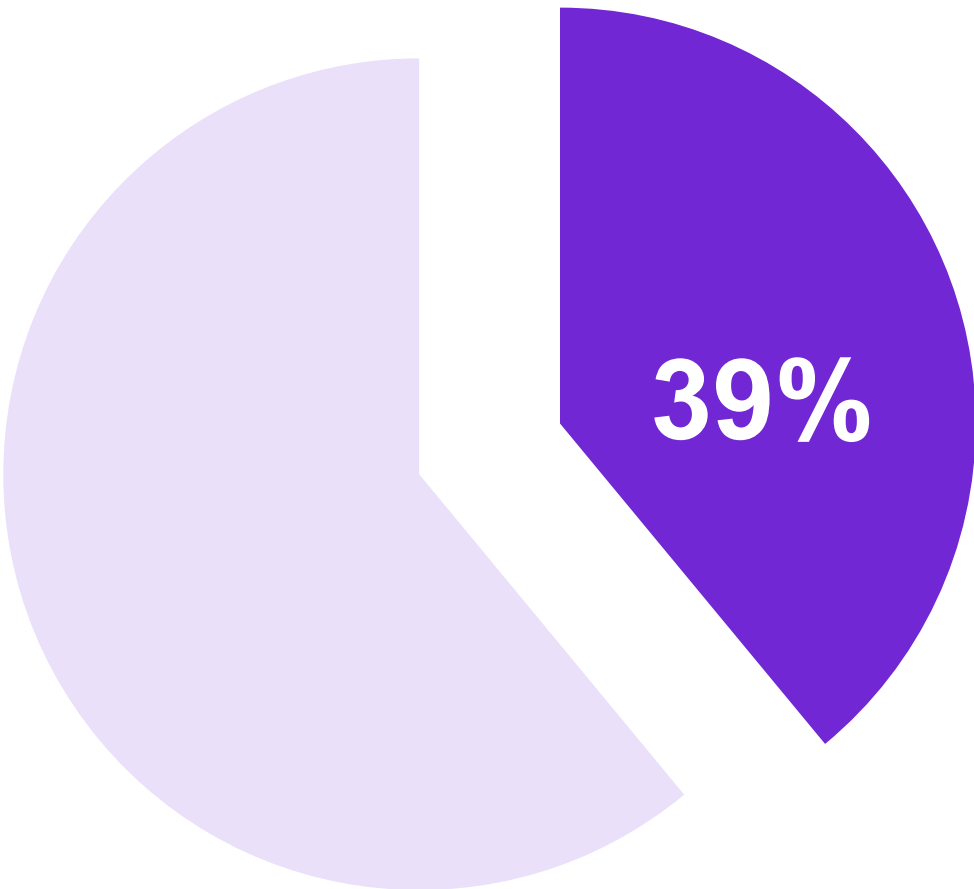


Stay the Same

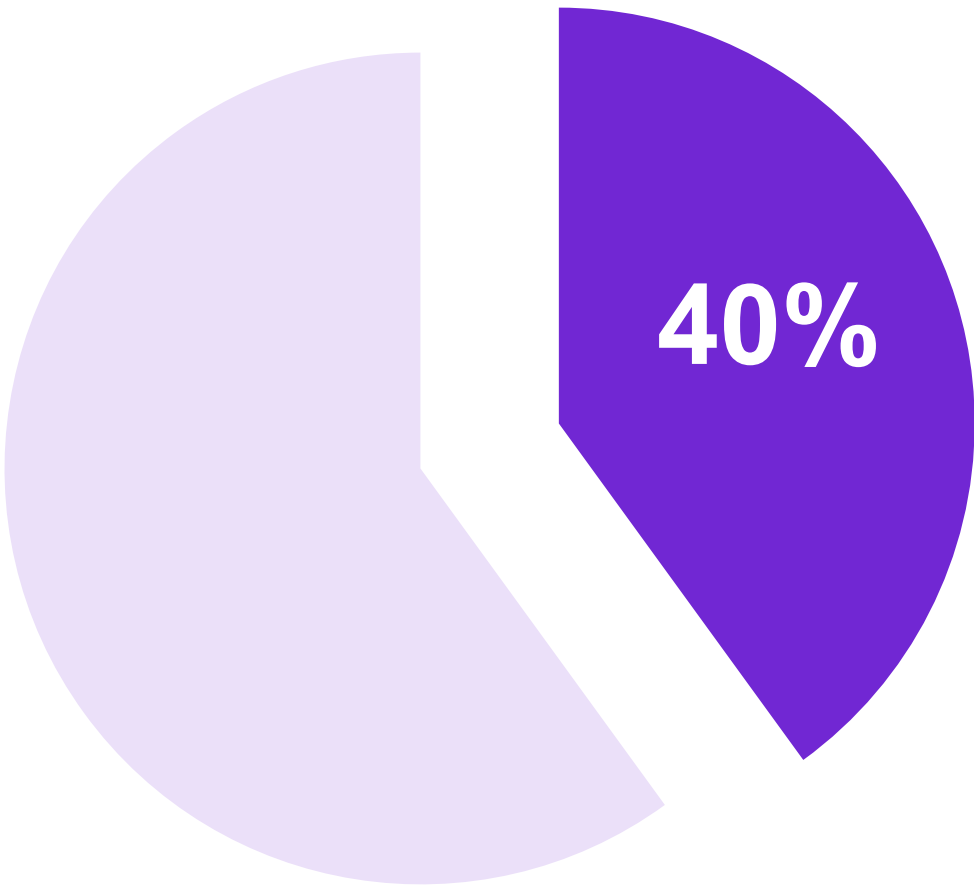
Q33B: When compared to 2019, do you expect the number of flights you will take for leisure trips to increase, decrease, or stay the same?



Increase

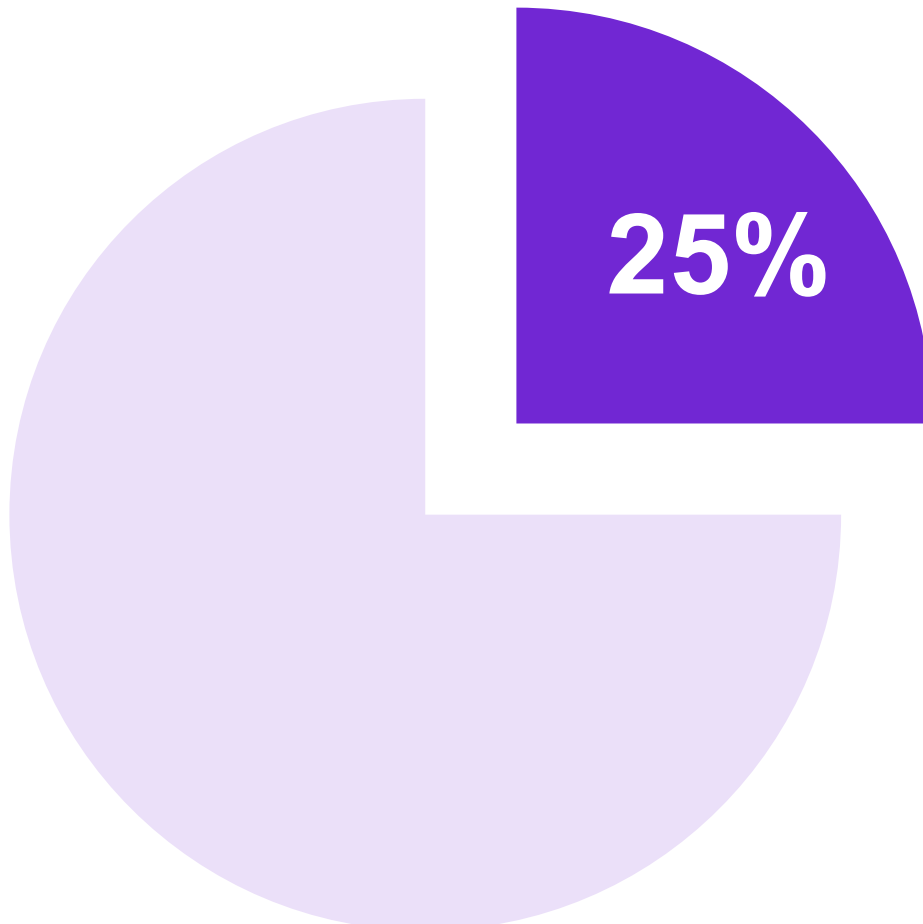


Decrease

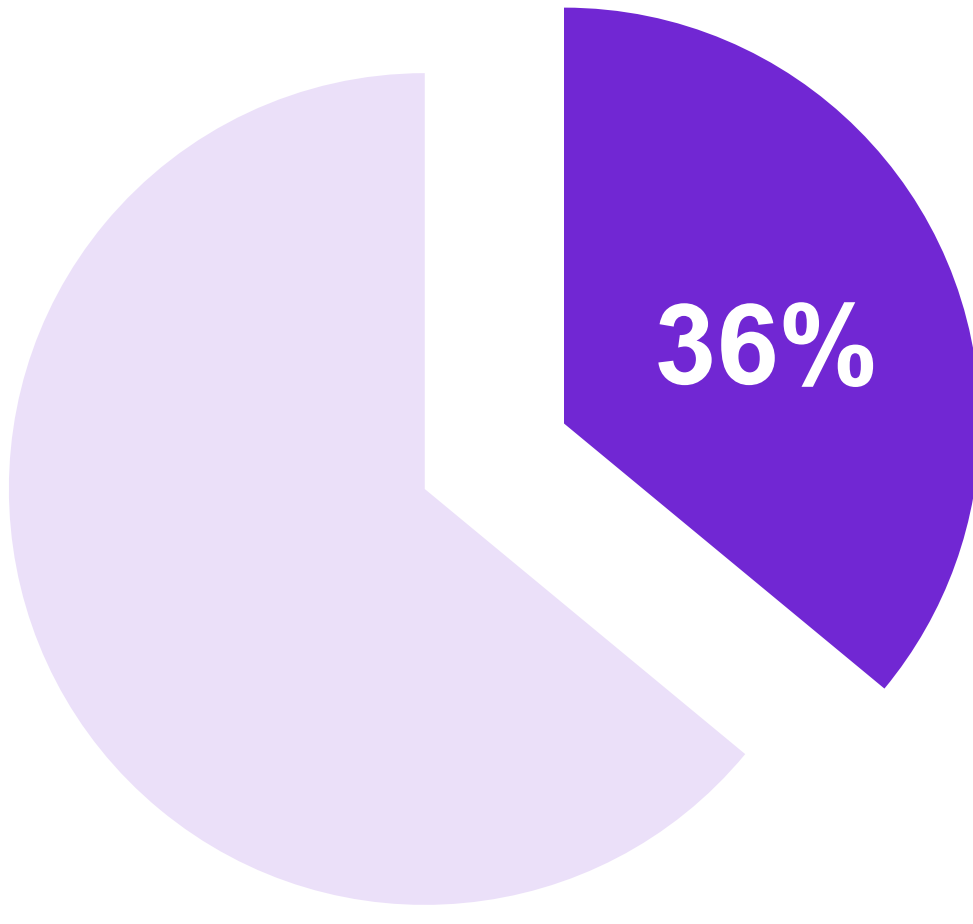


Stay the Same

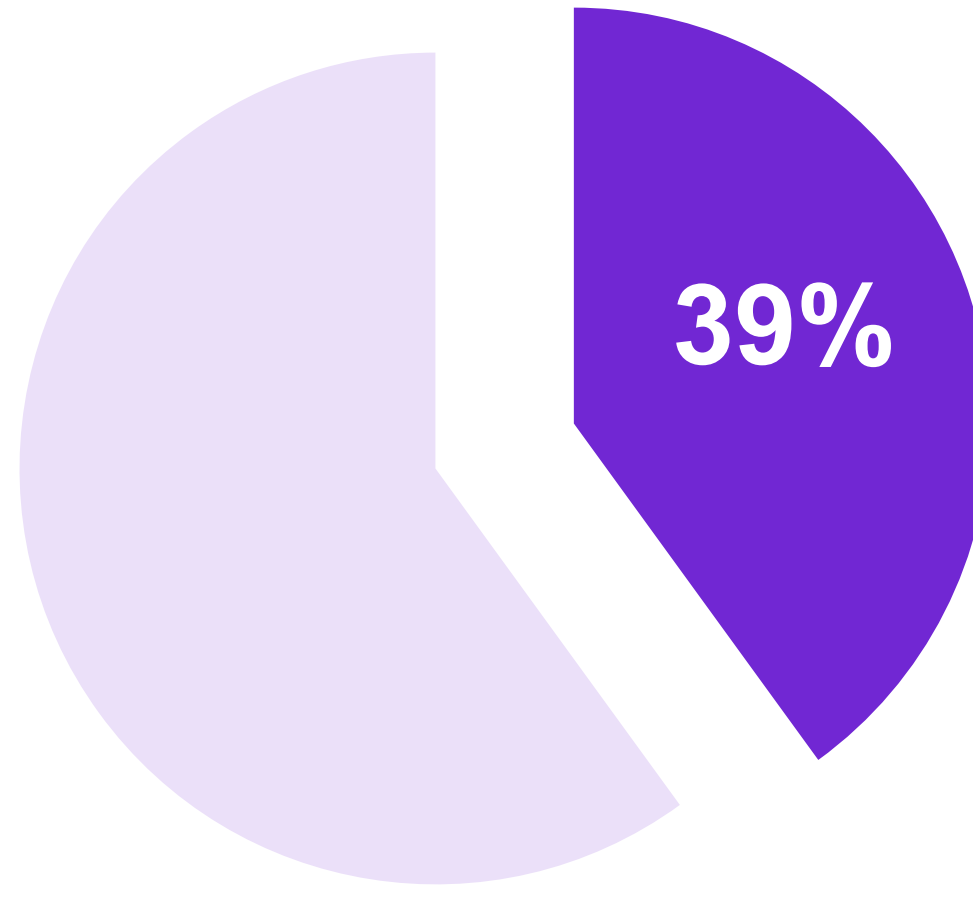
Q33C: When compared to 2019, do you expect the number of nights you will stay at a hotel or other paid accommodation for leisure trips to increase, decrease, or stay the same?



Increase

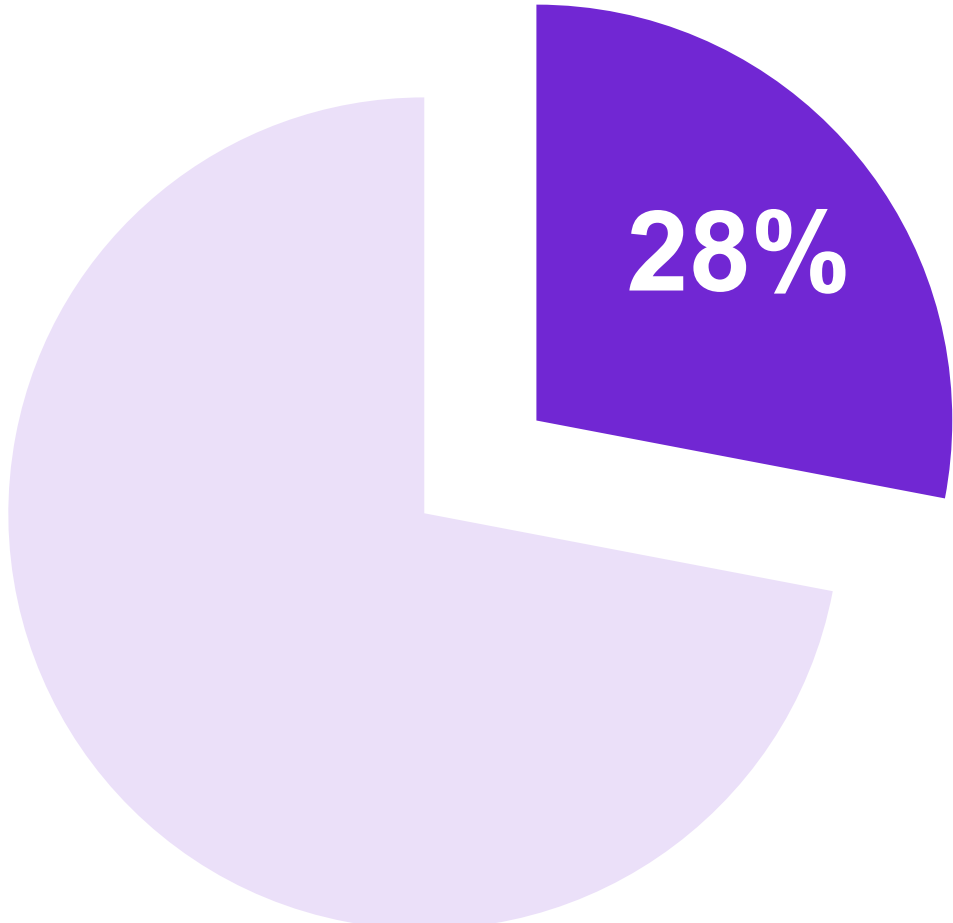


Decrease

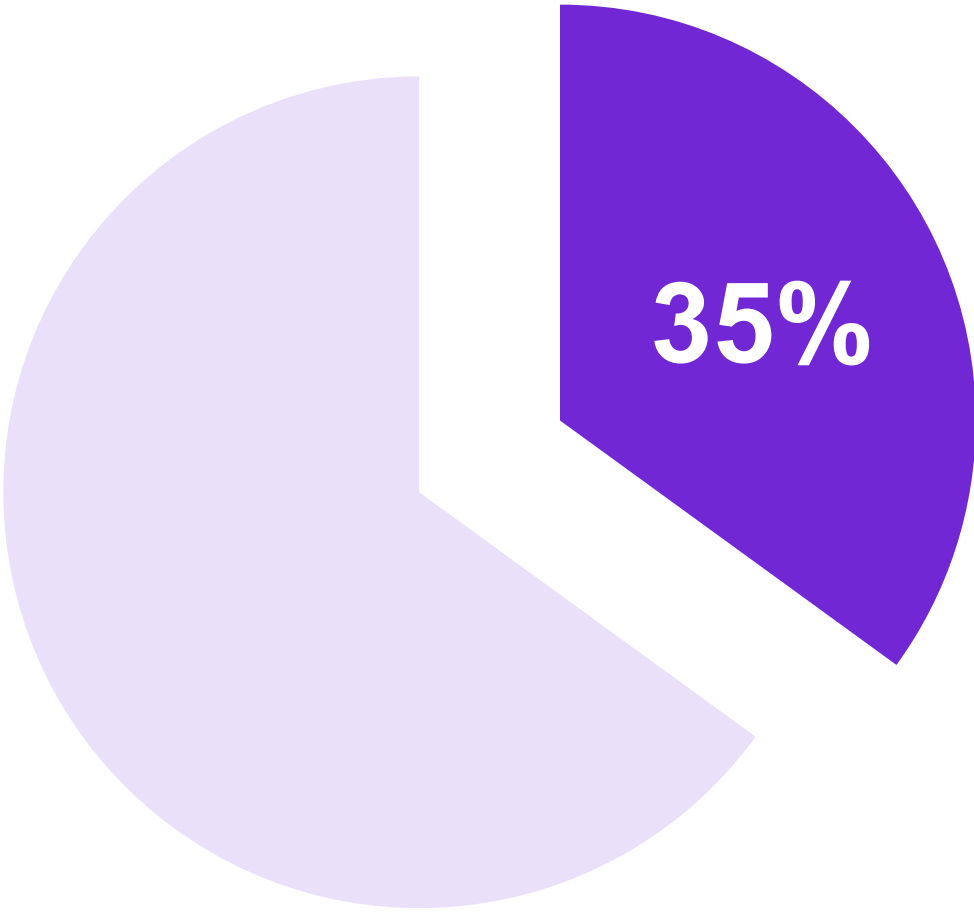


Stay the Same

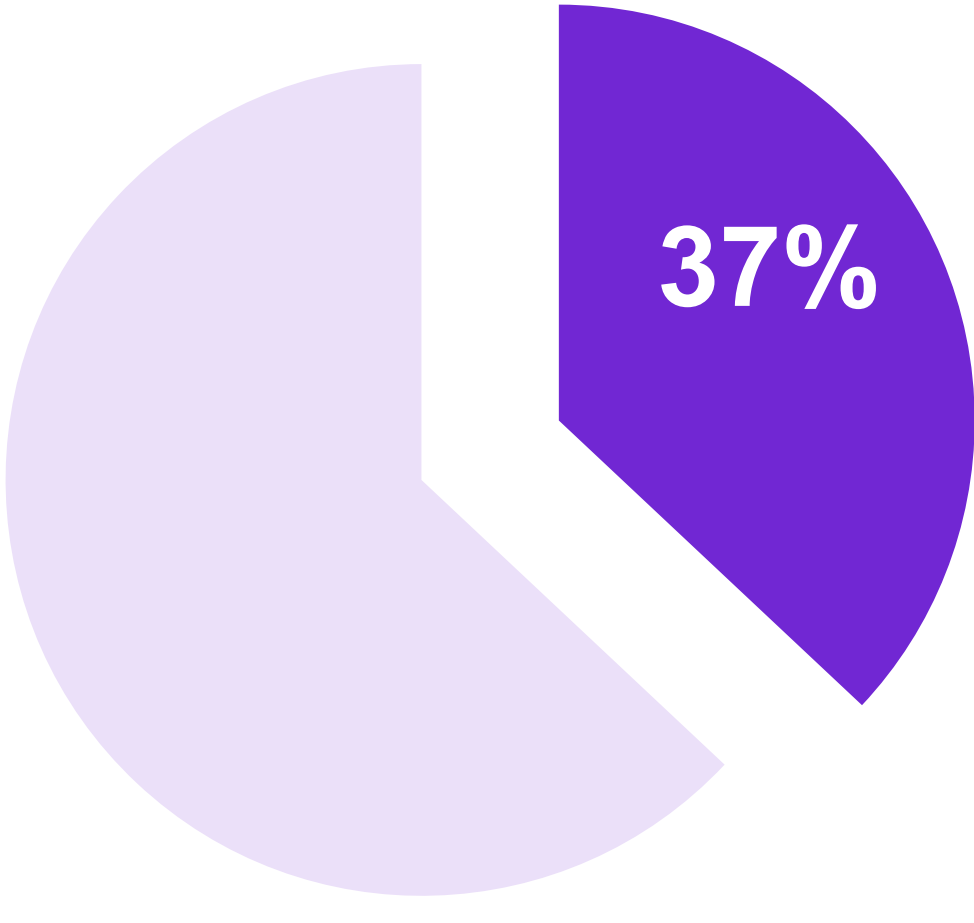
Q33D: When compared to 2019, do you expect the total amount of money you will spend on all of these leisure travel trips to increase, decrease, or stay the same?



Increase

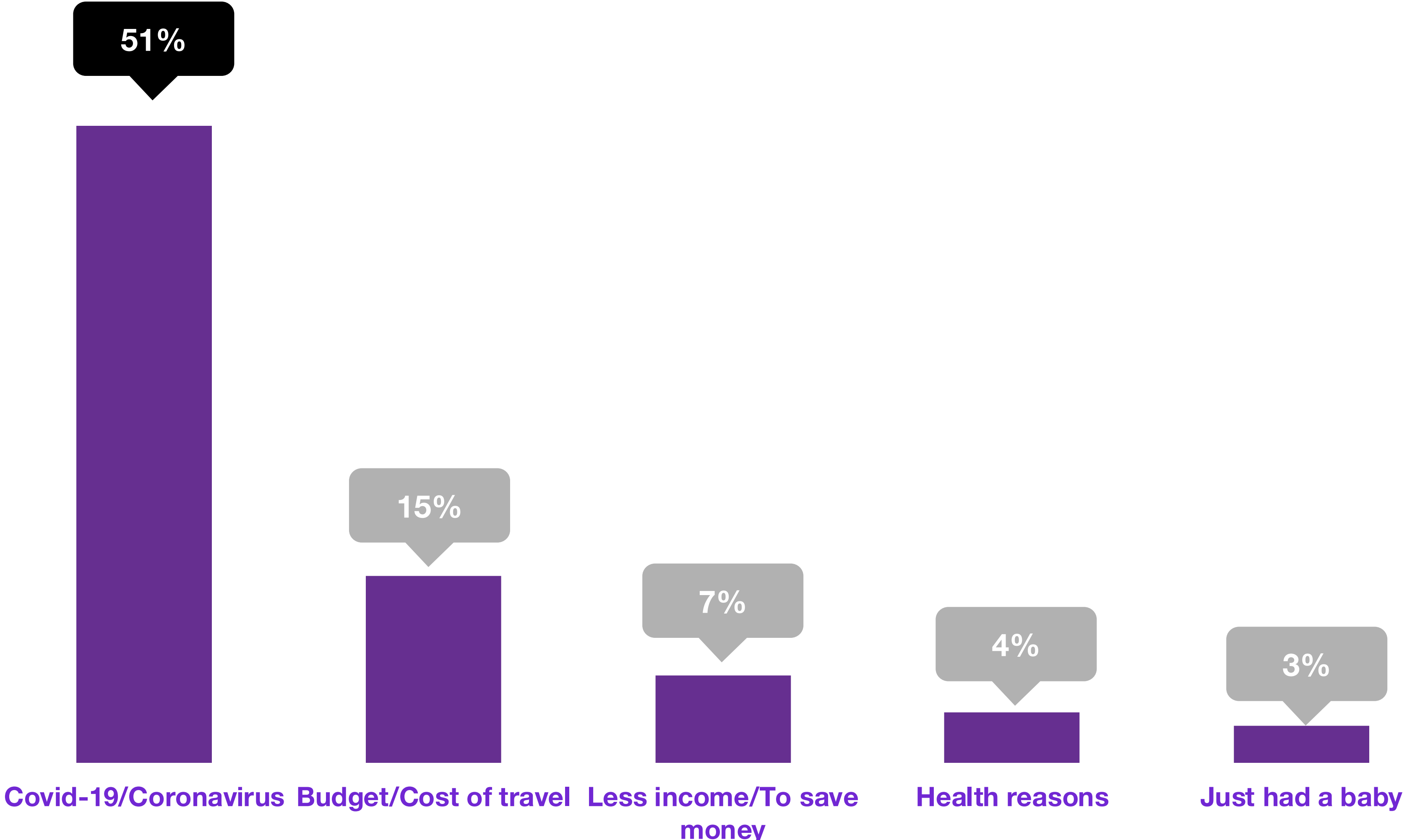


Decrease



Stay the Same

Q33E: You indicated that you expect your leisure travel trips to decrease in 2020 compared to 2019. Can you briefly tell us why?



Q34: In 2020, how likely are you to travel to the following destinations for leisure? (Part I)

Locations	Very Likely	Somewhat Likely	Somewhat Unlikely	Very unlikely	Not Sure
New Brunswick	13%	16%	12%	46%	13%
P.E.I.	7%	18%	14%	48%	13%
Newfoundland and Labrador	8%	15%	15%	50%	12%
Nova Scotia	11%	19%	13%	45%	11%
Quebec	25%	25%	13%	27%	9%
Ontario	33%	27%	11%	22%	7%

Q34: In 2020, how likely are you to travel to the following destinations for leisure? (Part II)

Locations	Very Likely	Somewhat Likely	Somewhat Unlikely	Very unlikely	Not Sure
Manitoba	8%	12%	13%	56%	11%
Saskatchewan	8%	11%	13%	57%	11%
Alberta	18%	19%	11%	42%	10%
British Columbia	23%	23%	12%	33%	9%
Yukon	5%	9%	11%	62%	12%
Northwest Territories	5%	9%	10%	63%	13%
Nunavut	5%	7%	11%	64%	13%

Q34b: Most Mentions per Province (Part I)

City	Province	Percentage Likelihood of Visiting
Fredericton	New Brunswick	34%
Moncton	New Brunswick	32%
Charlottetown	P.E.I.	47%
Summerside	P.E.I.	26%
St. John's	Newfoundland and Labrador	31%
Corner Brook	Newfoundland and Labrador	16%

N(NB)=602,
N(PEI)=550,
N(NF)=503

Q34b: Most Mentions per Province (Part II)

City	Province	Percentage Likelihood of Visiting
Halifax	Nova Scotia	48%
Cape Breton	Nova Scotia	23%
Montreal	Quebec	49%
Quebec City	Quebec	42%
Toronto	Ontario	42%
Ottawa	Ontario	26%

N(NS)=602,
N(QC)=867,
N(ON)=966

Q34b: Most Mentions per Province (Part III)

City	Province	Percentage Likelihood of Visiting
Winnipeg	Manitoba	41%
Brandon	Manitoba	15%
Saskatoon	Saskatchewan	38%
Regina	Saskatchewan	36%
Calgary	Alberta	46%
Edmonton	Alberta	34%

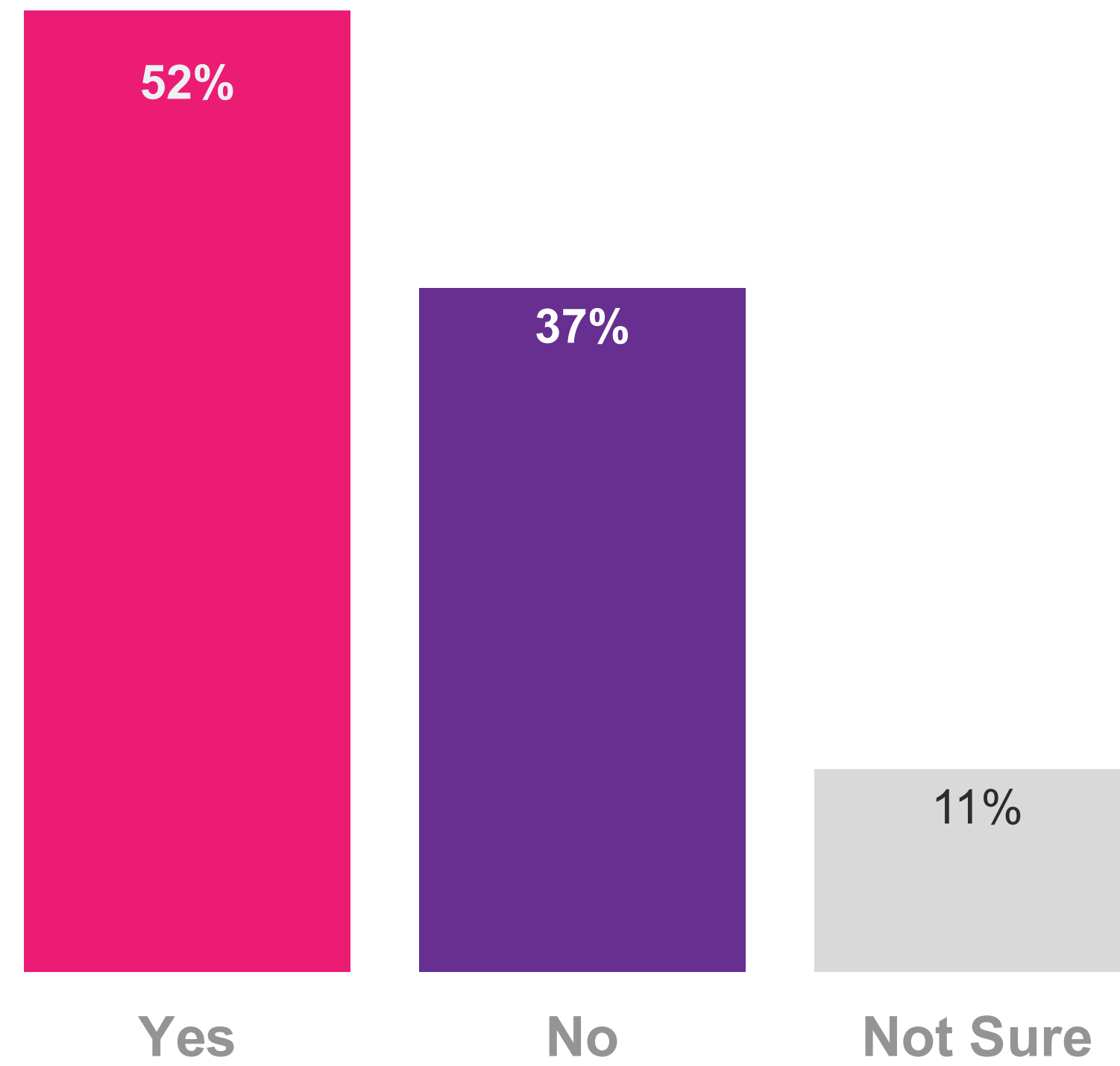
N(MB)=453,
N(SK)=441,
N(AB)=682

Q34b: Most Mentions per Province (Part IV)

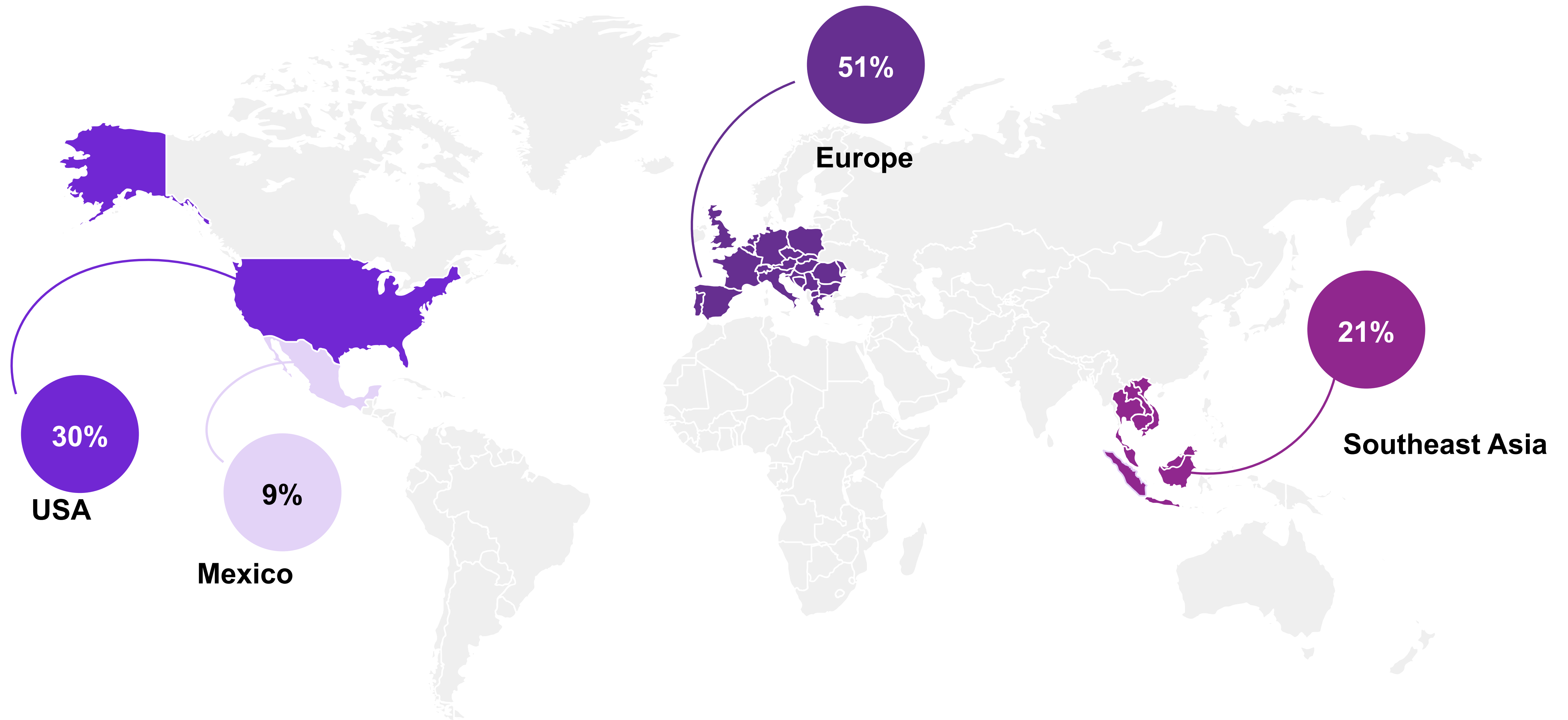
City	Province	Percentage Likelihood of Visiting
Vancouver	B.C.	47%
Victoria	B.C.	22%
Whitehorse	Yukon	53%
Dawson City	Yukon	1%
Yellowknife	N.W.T.	50%
Iqaluit	Nunavut	47%

N(BC)=798,
N(YK)=385,
N(NWT)=383,
N(NUN)=367

Q35a: You indicated that your leisure travel in 2020 is not likely to be anywhere in Canada. Are you planning to travel for leisure outside Canada in 2020?



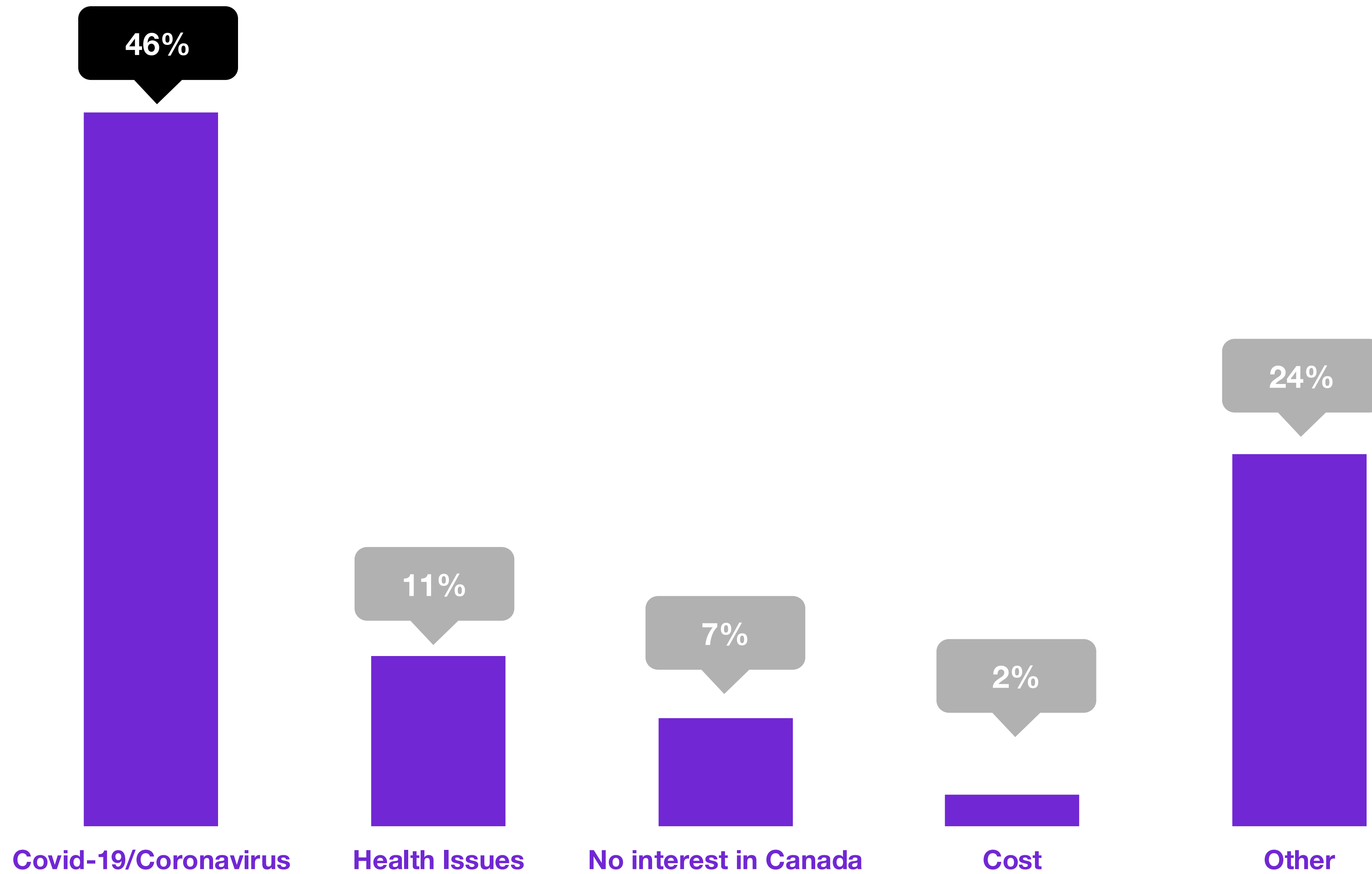
Q35: You indicated that your leisure travel in 2020 is likely not within Canada. Please list all non-Canadian destinations you have travelled to, and plan to travel to in 2020



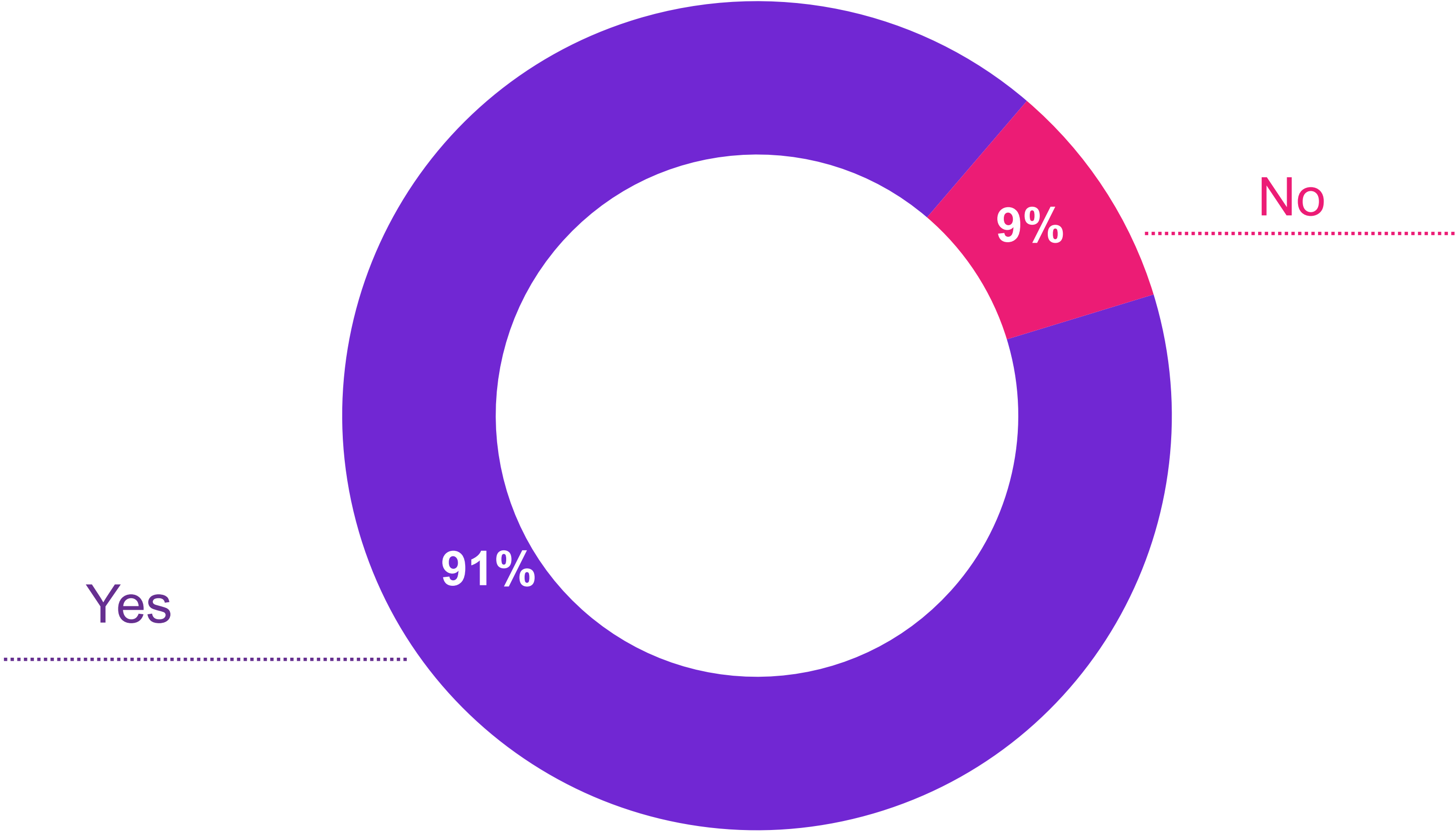
Q36: You indicated that you are not at all likely to take a leisure travel trip within Canada in 2020. From the list below, please rank the most to least important reason you are not likely to take a leisure trip within Canada in 2020

Reason	Very Important	Somewhat Important	Neutral	Somewhat Unimportant	Least Important
Cost	33%	32%	18%	10%	7%
Climate	7%	36%	30%	23%	4%
No interest in spending holidays in Canada	24%	11%	36%	18%	11%
Been everywhere in Canada that I want to go to	8%	18%	10%	43%	22%
Other	67%	11%	9%	7%	7%

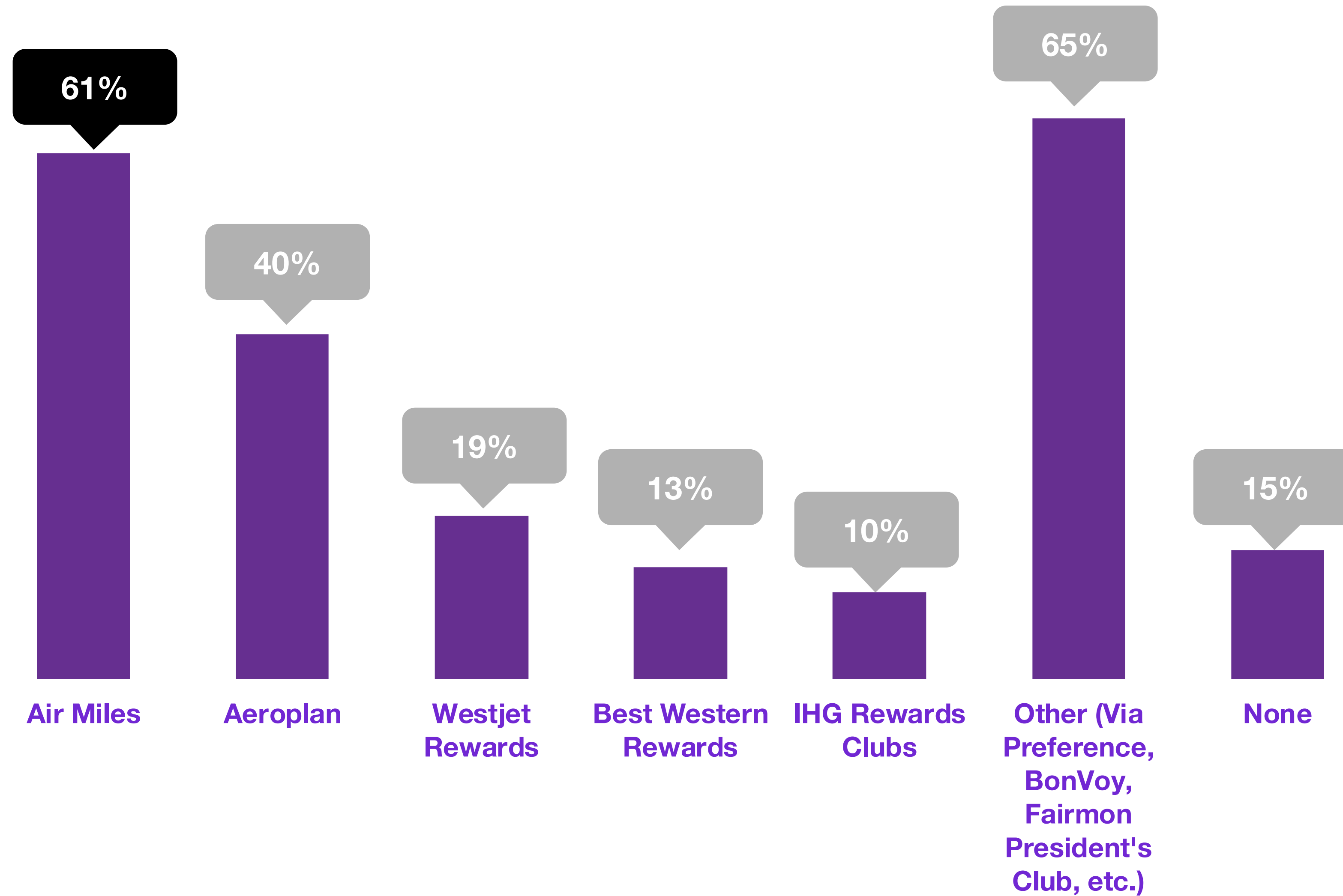
Q36E: You indicated that you are not at all likely to take a leisure trip within Canada in 2020 – Other reasons, please specify



D1: Do you have a passport?



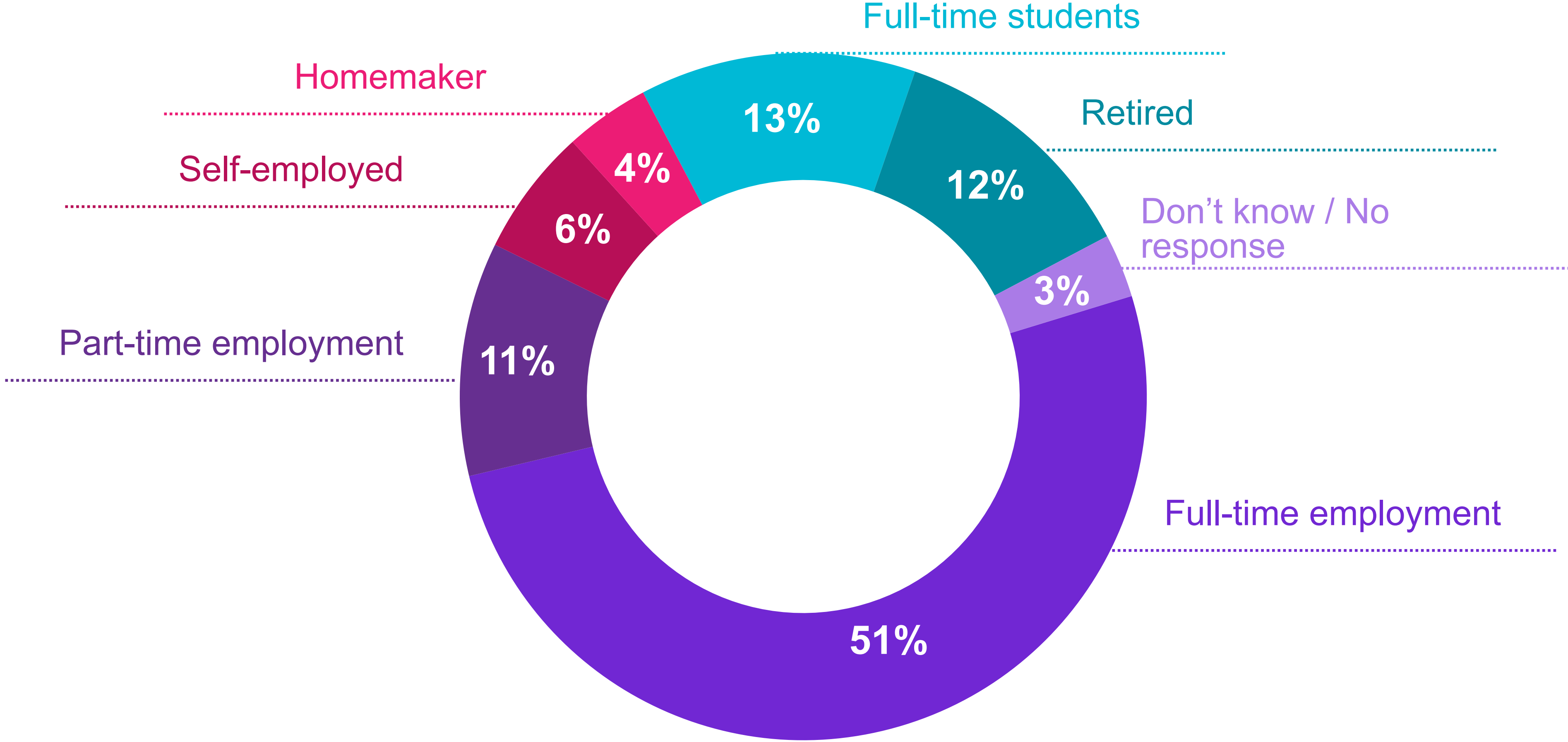
D2: Which of the following loyalty programs are you a member of?



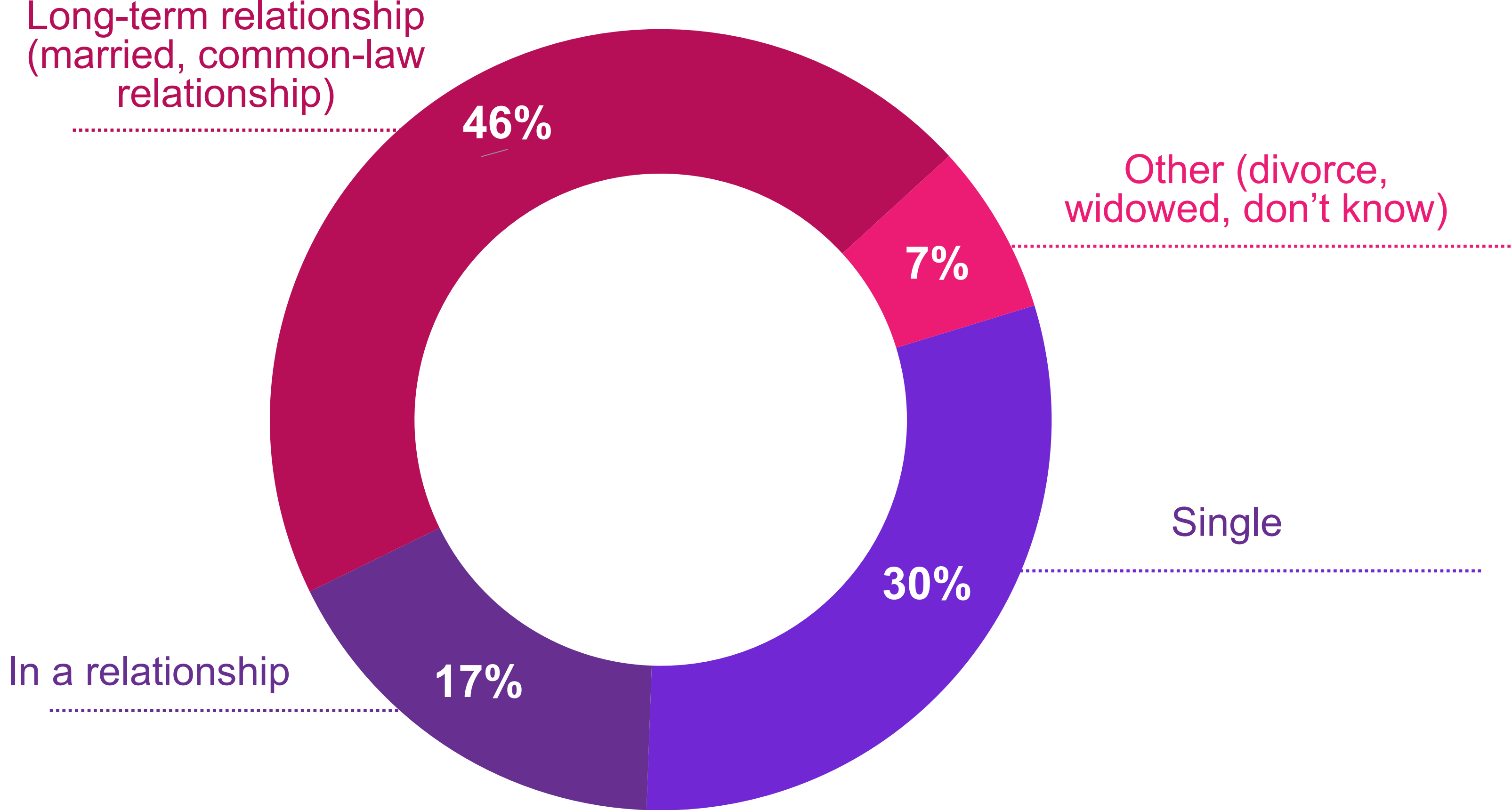
D3: Please indicate how you identify your gender identity

Man	39%
Woman	39%
Cisgender	9%
Genderqueer	3%
Non-binary	3%
Trans	3%
Two Spirit	2%
Prefer not to Answer	2%

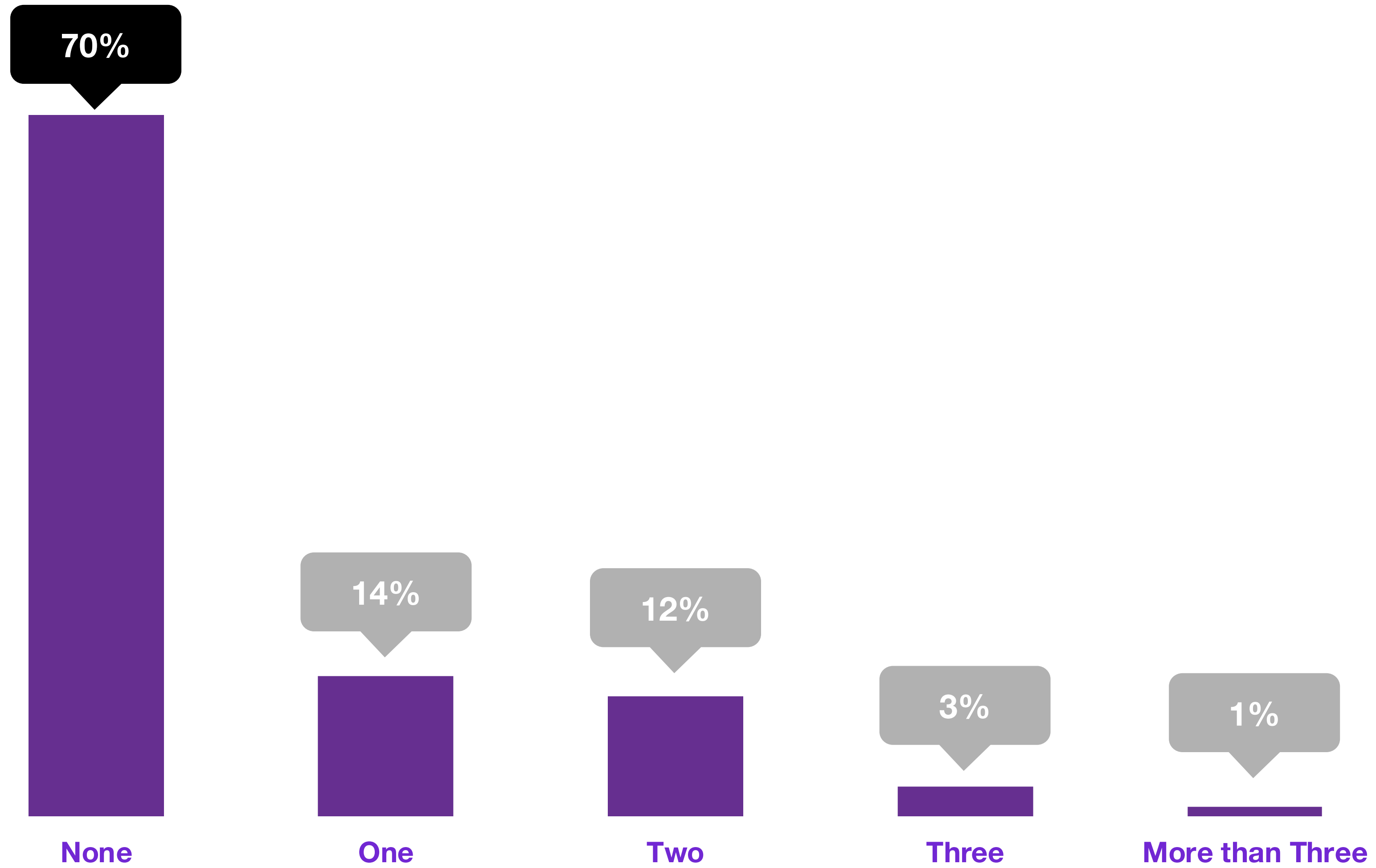
D4: What is your employment status?



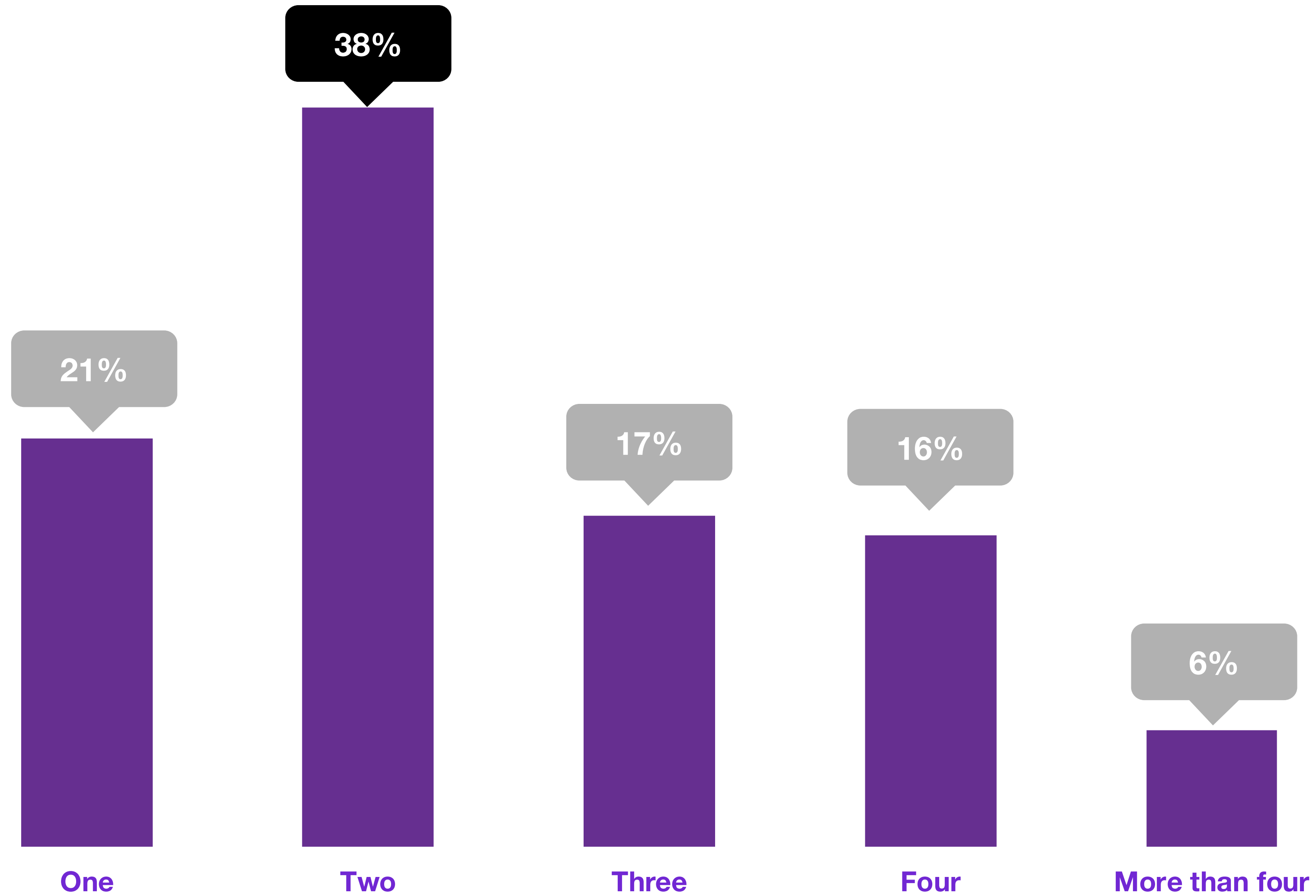
D5: What is your marital status?



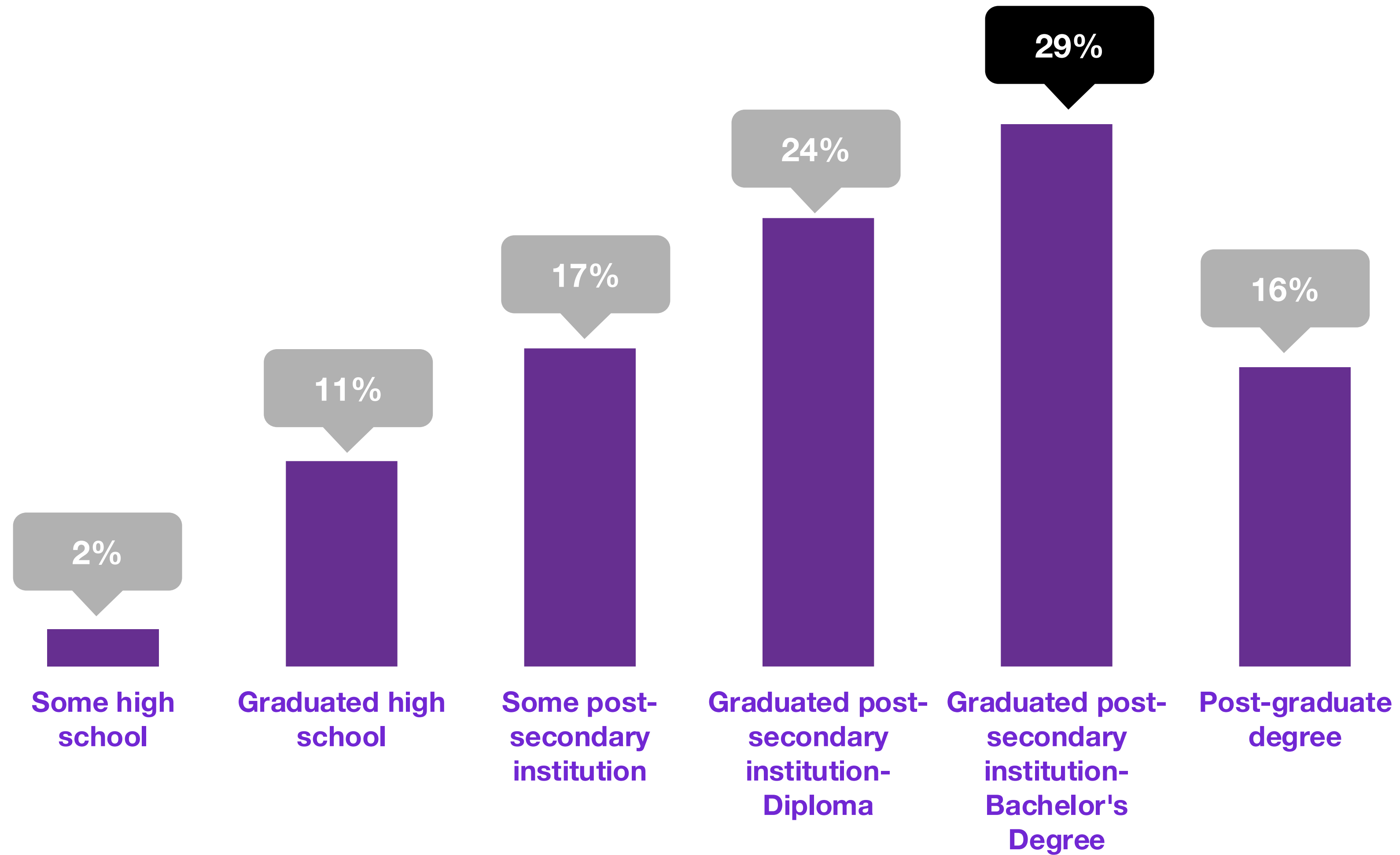
D5b: Do you have any children under 18 living in your home?



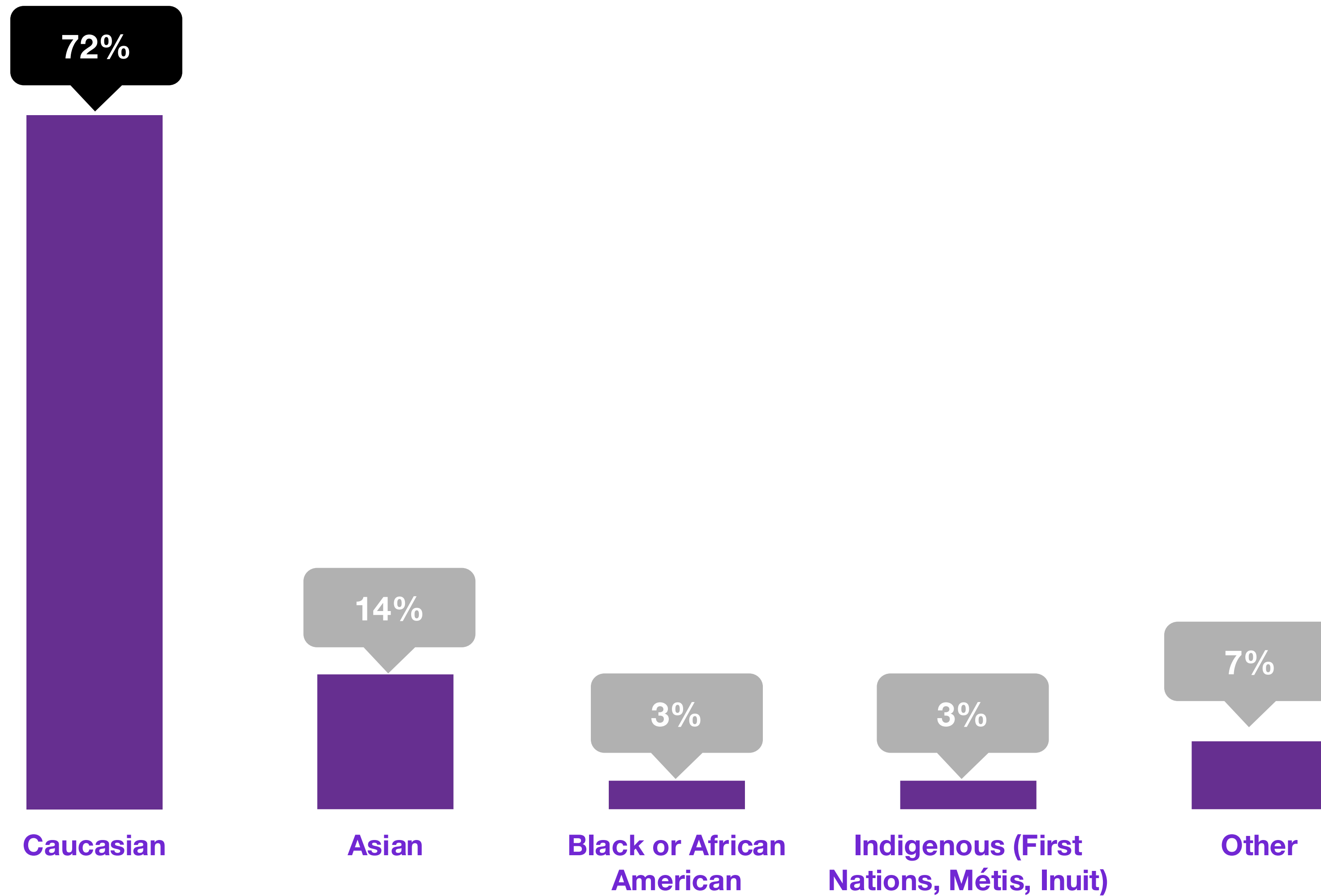
D6: How many people live in your household, including yourself (partner, children, family, friends, roommates, etc.)?



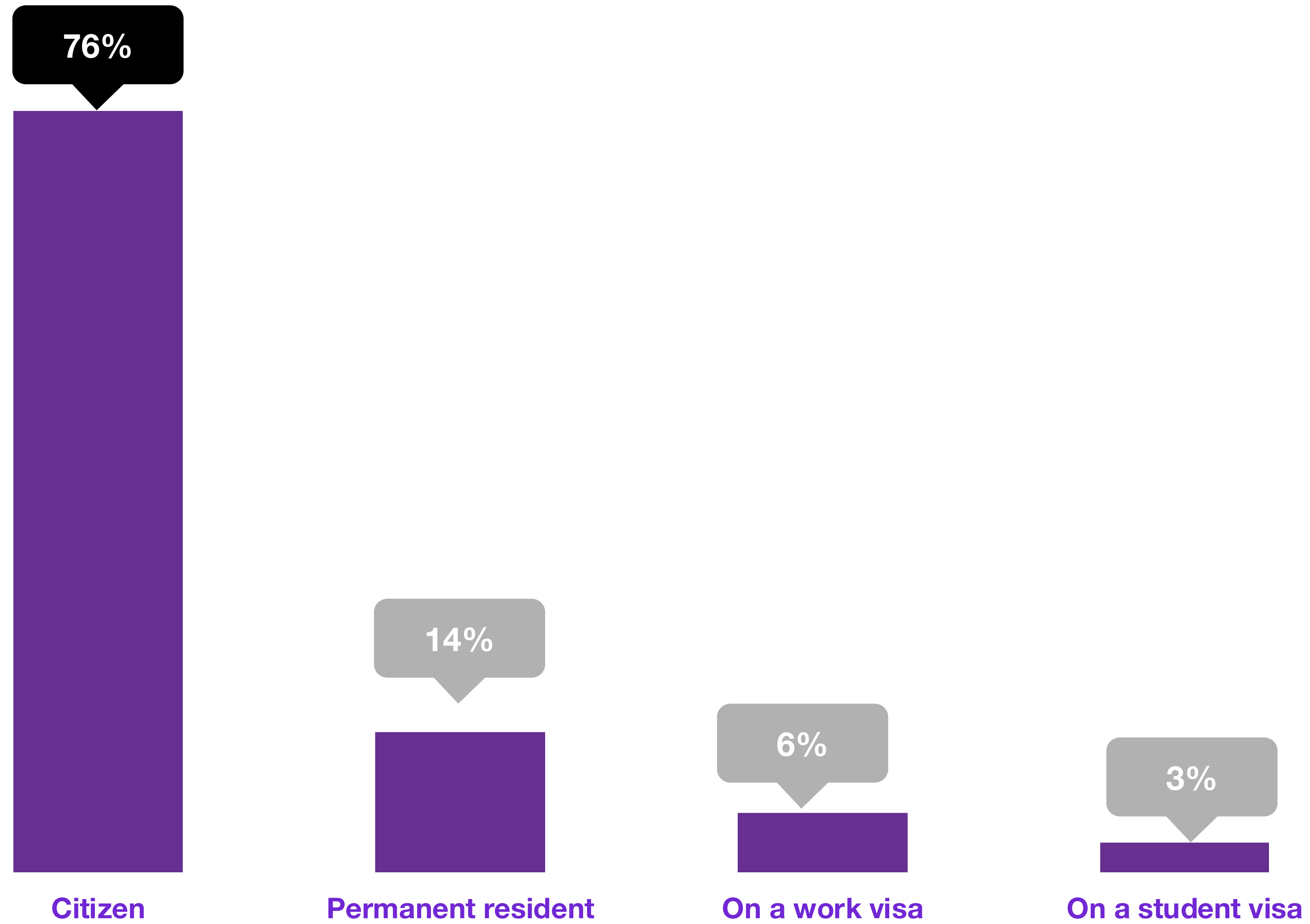
D7: What is the highest level of education you have completed?



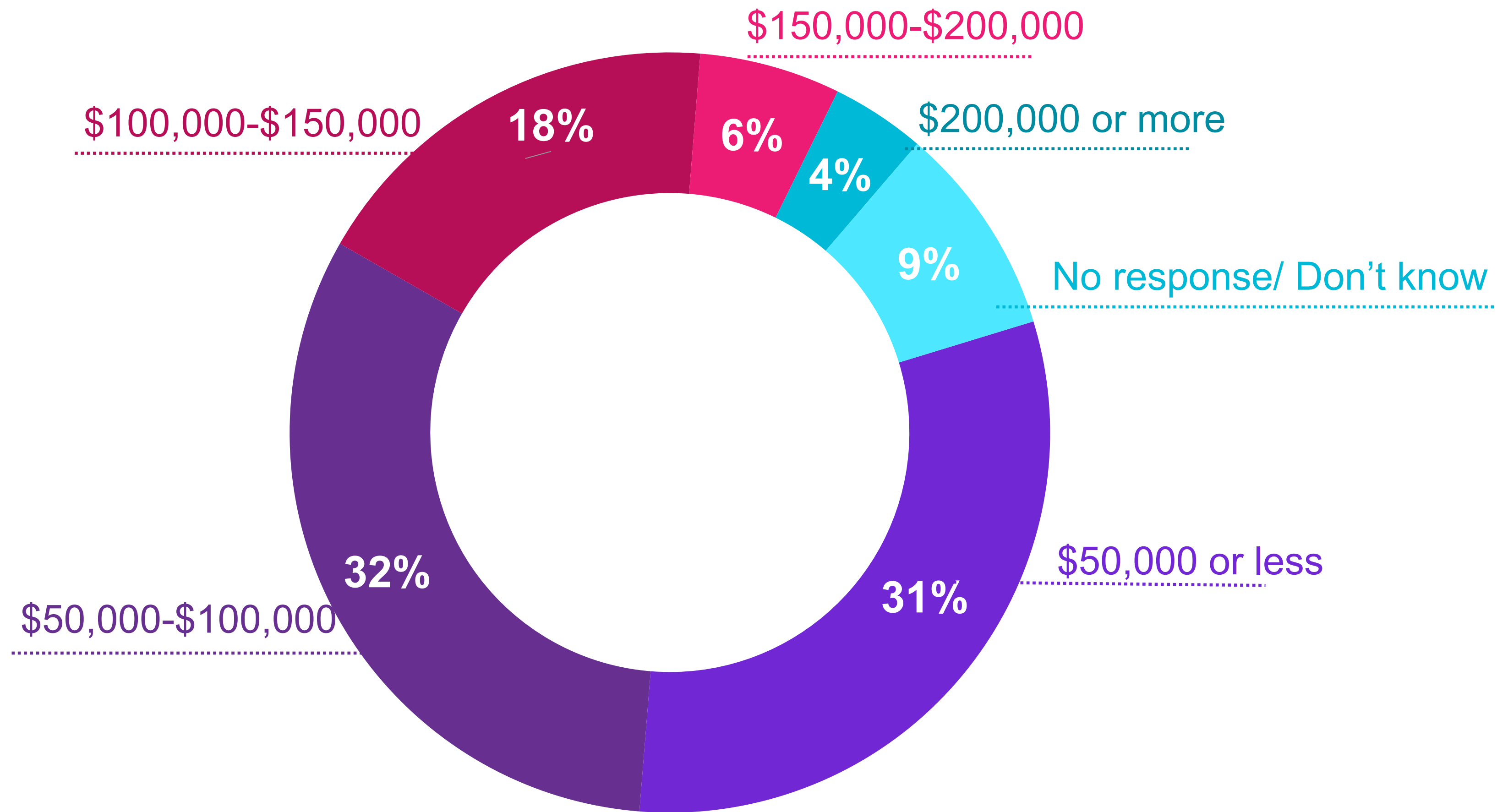
D8: What ethnicity do you most closely identify with?



D9: What is your current residency status in Canada?



D10: What was your total household income in 2019, before taxes?



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Thank you