RESIDENT SENTIMENT INDEX: TOURISM IN CANADA

2024 ANNUAL REPORT





SUMMARY

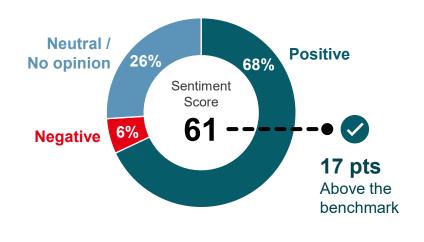
In 2024, Canadian residents remained broadly supportive of tourism. Compared to similar destinations worldwide, sentiment was more positive, and concerns about tourism were minimal. However, as seen globally, support for tourism growth in Canada has been trending downward. While less severe than in other countries, this decline is more noticeable during peak travel seasons and in high-density tourism regions.

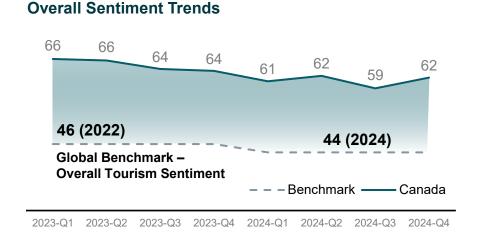
This presents an opportunity to reinforce the everyday benefits of tourism — particularly at the local level. From supporting restaurants and small businesses to enhancing parks, festivals, and cultural spaces, tourism contributes to vibrant communities. These benefits are often most visible in public places but can feel less tangible at the individual level. Clearer communication about how tourism policy and investment improve quality of life — from job creation to community infrastructure — can help bridge that gap and keep resident support strong.

There is also an opportunity to elevate Indigenous tourism experiences. These offerings not only enrich Canada's cultural landscape and support reconciliation, but also invite residents to participate in meaningful, place-based experiences.

OVERALL TOURISM SENTIMENT INDEX

Overall sentiment which measures the balance of positive vs. negative consequences of tourism.





Question: In general, would you say that the development of tourism in Canada generates [more positive or negative consequences]?

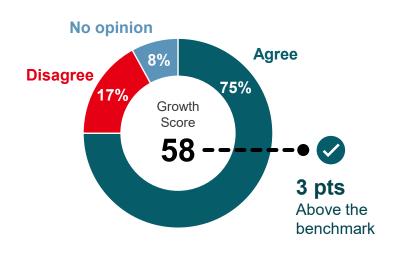
Key Takeaways

In 2024, most Canadian residents were supportive of tourism overall, and viewed the development of tourism as having a mostly positive impact on communities.

While Canadian resident sentiment scores have trended slightly downward over the past 2 years, this is consistent with recent global trends, and Canadian Resident Sentiment scores currently remain well above the global benchmark.

TOURISM GROWTH SUPPORT INDEX

Net proportion of residents that support the growth of tourism.



Tourism Growth Support Trends 66 66 63 60 59 59 57 58 60 (2022) Global Benchmark – Tourism Growth Support - - - Benchmark — Canada 2023-Q1 2023-Q2 2023-Q3 2023-Q4 2024-Q1 2024-Q2 2024-Q3 2024-Q4

Question: Please express the extent to which you agree with each of the following statements: My city needs to continue to promote itself to attract more tourists.

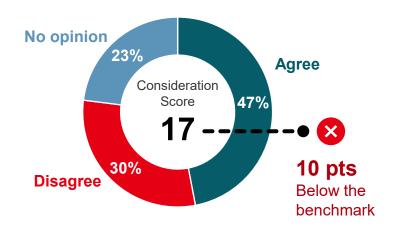
Key Takeaways

On average in 2024, three-quarters of Canadian residents supported ongoing tourism growth and agreed that that their community should continue to attract more tourists.

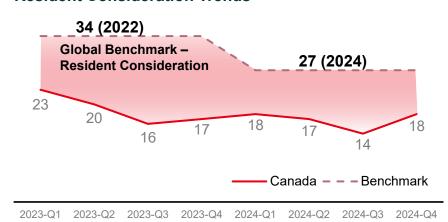
As with the overall Tourism Sentiment Index, Canada's Tourism Growth Support Index scores have followed a declining global trend over the past two years but are still sitting above the global benchmark.

RESIDENT CONSIDERATION INDEX

The balance between residents considering that tourism policy takes into consideration its effect on their lives vs. those who do not agree with this.



Resident Consideration Trends



Question: Please express the extent to which you agree with each of the following statements: My city's tourism policy takes into account the impact it has on the life of locals.

Key Takeaways

The Resident Consideration Index, which measures residents' impressions of whether local tourism policy considers the day-to-day impact on residents, continued to fall consistently behind the global benchmark in 2024. This score was lowest among residents who self-identified as living in regions of low tourism activity.

This trend reflects a level of uncertainty on this topic and indicates an ongoing opportunity for policymakers and industry leaders to better communicate with Canadian residents about the goals and impacts of local tourism policy.





ANTI-TOURISM SENTIMENT INDEX

3.1% of respondents believe tourism

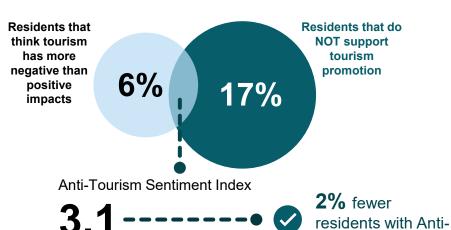
has net negative impacts and do NOT

support further promotion (All indices

are multiplied by 100 rather than

reported as percentages.)

The proportion of residents opposed to tourism and its growth.

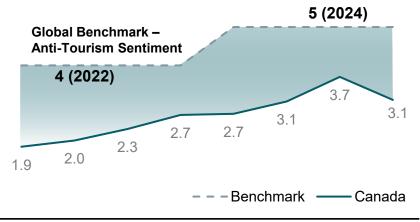


Tourism Sentiment

compared to the

benchmark (5%)

Anti-Tourism Sentiment Trends



Note: With the Anti-Tourism Sentiment Index, a result below the global benchmark is considered a positive result.

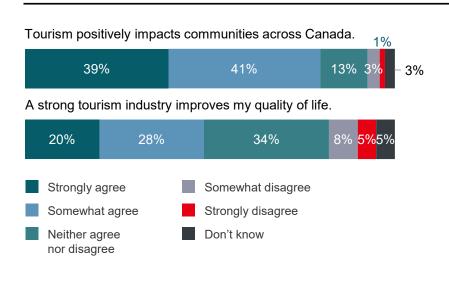
2023-Q1 2023-Q2 2023-Q3 2023-Q4 2024-Q1 2024-Q2 2024-Q3 2024-Q4

Key Takeaways

On average in 2024, just 3% of Canadians were identified as detractors with a strong aversion to tourism. This remains well below the global average for this metric, which reflects well for Canada's tourism industry.

After increasing throughout the year and hitting a record high in September 2024, Canada's Anti-Tourism Sentiment index declined throughout Q4 and was just 2.3 in December—on par with the 2023 average score of 2.2.

PERCEPTIONS OF THE IMPACT OF TOURISM IN CANADA



Perceived Impact Trends 86% 82% 82% 81% 80% 79% 79% 79% 52% 50% 50% 49% 48% 48% 48% Positively impacts communities (T2B) Improves my quality of life (T2B)

2023-Q2 2023-Q3 2023-Q4 2024-Q1 2024-Q2 2024-Q3

Key Takeaways

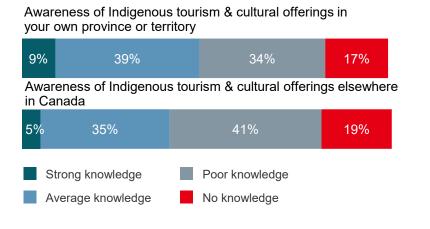
Canadian residents expressed stronger positive perceptions of the impact of tourism at the community level than the individual level.

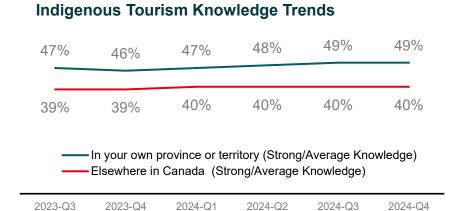
Still, negative perceptions of the impact of tourism were rare at both the community and individual level.

While positive perceptions peaked in Q1 2023, they have been relatively stable since then.

KNOWLEDGE OF INDIGENOUS TOURISM OFFERINGS IN CANADA

Question: Please express the extent to which you agree with each of the following statements.





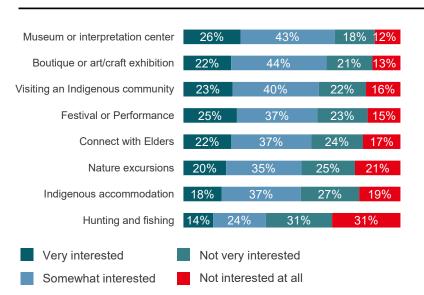
Question: In general, how well do you feel you know the Indigenous tourism and cultural offering in...? Note: Data collection for this question began in June 2023.

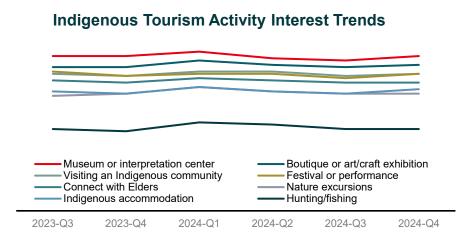
Key Takeaways

Nearly half of Canadian residents indicated they were knowledgeable about Indigenous tourism and cultural offerings within their own province or territory in 2024, while just four in ten reported being knowledgeable about those offerings elsewhere in Canada.

Those awareness levels have been relatively stable over the past year and a half, so there is a big opportunity to promote these activities within Canada to increase awareness and participation.

INTEREST IN INDIGENOUS TOURISM ACTIVITIES IN CANADA





Key Takeaways

Canadian residents expressed a moderate to strong interest in Indigenous tourism activities in Canada, particularly those centered around arts and culture.

There has been very little change in interest levels for any activity category over the past year and a half, indicating an untapped opportunity to promote these activities within Canada.

Question: What is your level of interest in the following Indigenous cultural and tourism activities in Canada?