

SUMMARY

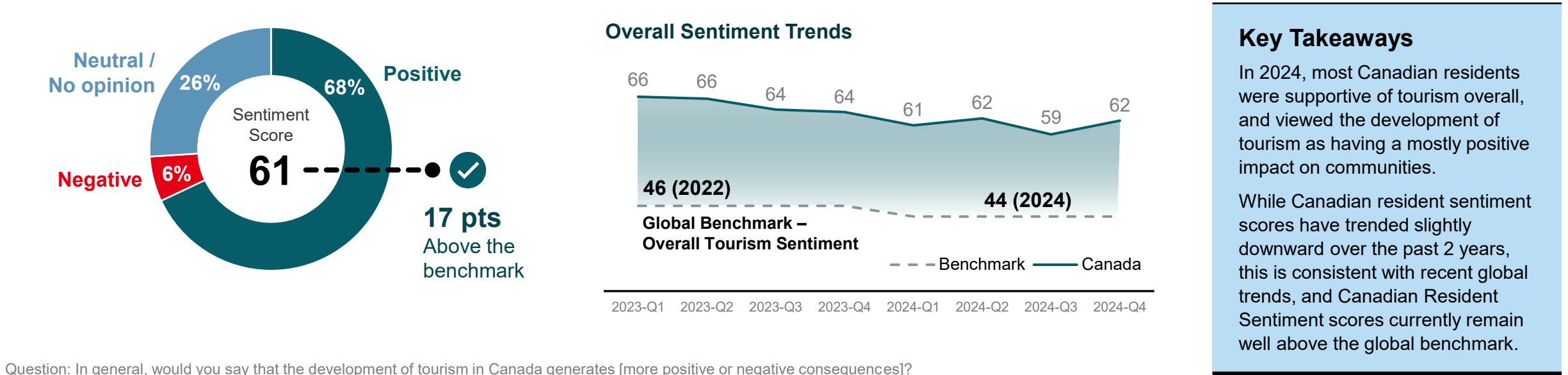
In 2024, Canadian residents remained broadly supportive of tourism. Compared to similar destinations worldwide, sentiment was more positive, and concerns about tourism were minimal. However, as seen globally, support for tourism growth in Canada has been trending downward. While less severe than in other 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

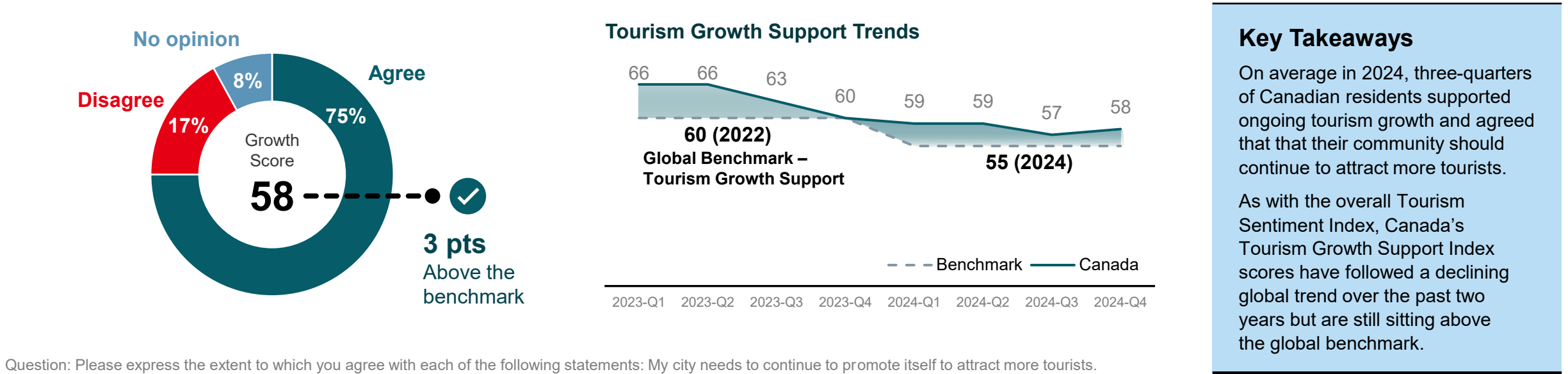
Overall sentiment which measures the balance of positive vs. negative consequences of tourism.



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

TOURISM GROWTH SUPPORT INDEX

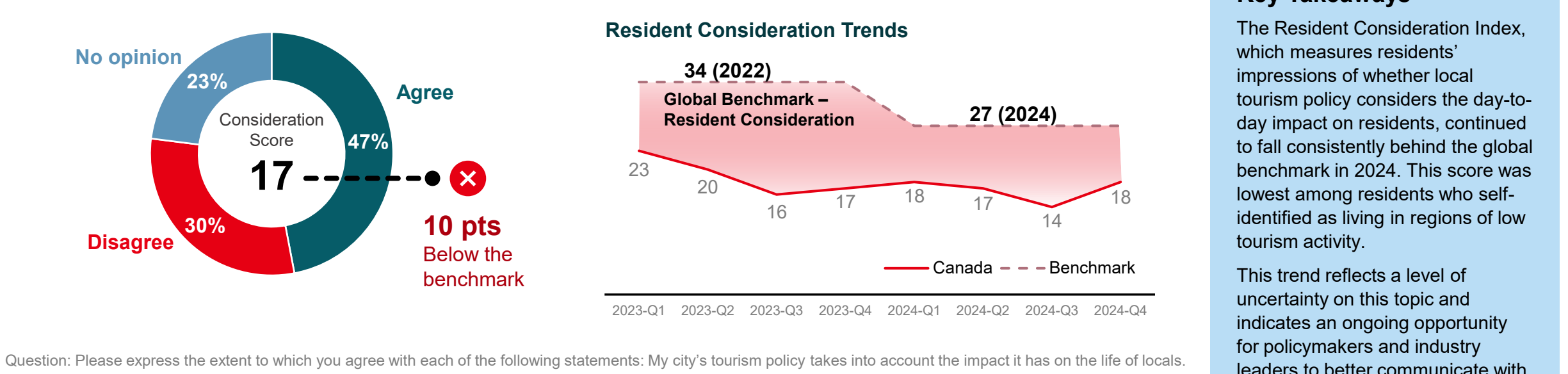
Net proportion of residents that support the growth of tourism.



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.

RESIDENT CONSIDERATION INDEX

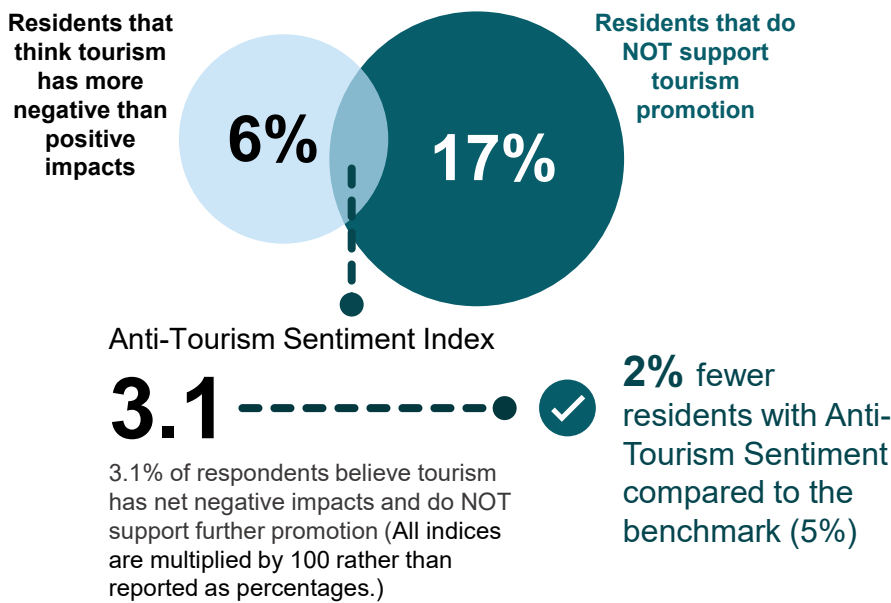
The balance between residents considering that tourism policy takes into consideration its effect on their lives vs. those who do not agree with this.



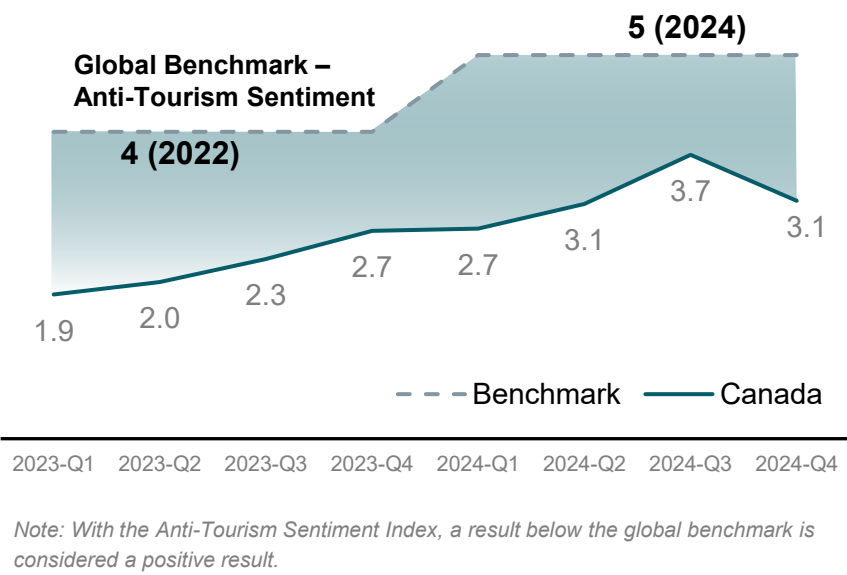
Question: Please express the extent to which you agree with each of the following statements: My city's tourism policy takes into account the impact it has on the life of locals.

## ANTI-TOURISM SENTIMENT INDEX

The proportion of residents opposed to tourism and its growth.



### Anti-Tourism Sentiment Trends

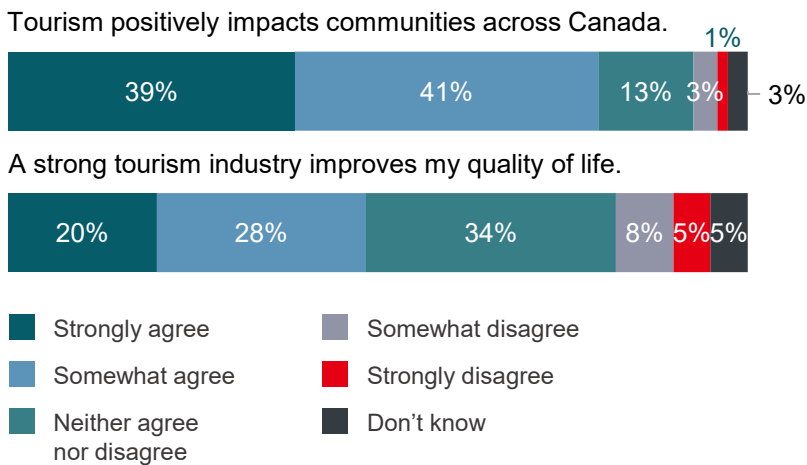


#### Key Takeaways

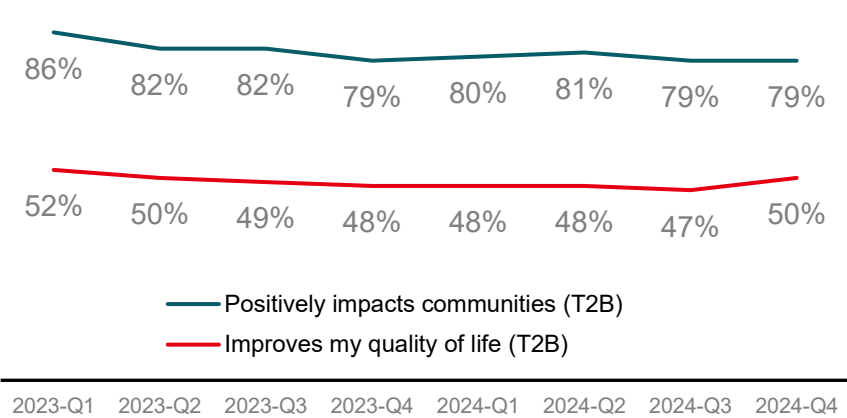
On average in 2024, just 3% of Canadians were identified as detractors with a strong aversion to tourism. This remains well below the global average for this metric, which reflects well for Canada’s tourism industry.

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



#### Key Takeaways

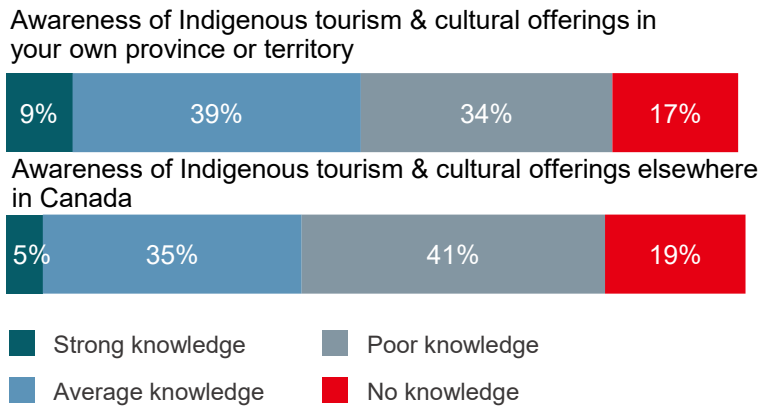
Canadian residents expressed stronger positive perceptions of the impact of tourism at the community level than the individual level.

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

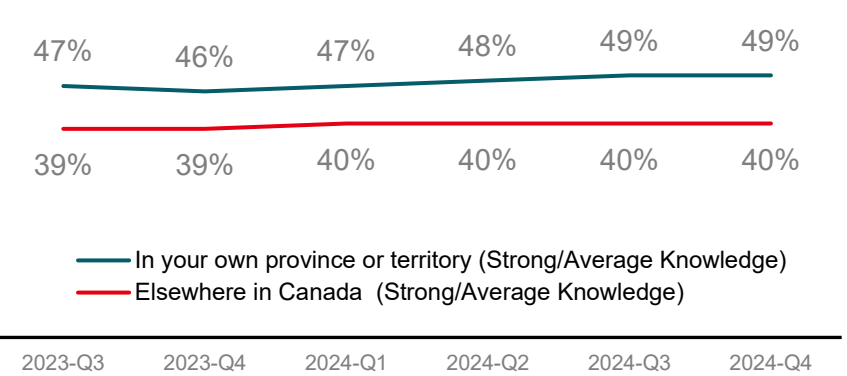
While positive perceptions peaked in Q1 2023, they have been relatively stable since then.

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

## KNOWLEDGE OF INDIGENOUS TOURISM OFFERINGS IN CANADA



### Indigenous Tourism Knowledge Trends



#### Key Takeaways

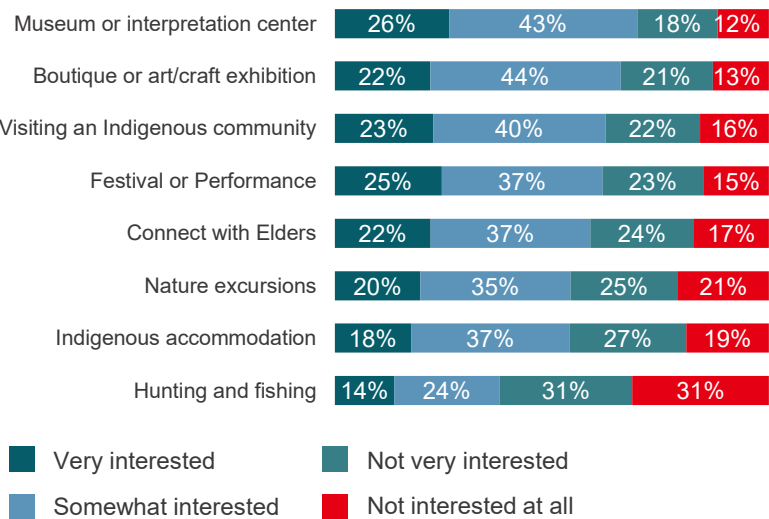
Nearly half of Canadian residents indicated they were knowledgeable about Indigenous tourism and cultural offerings within their own province or territory in 2024, while just four in ten reported being knowledgeable about those offerings elsewhere in Canada.

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.

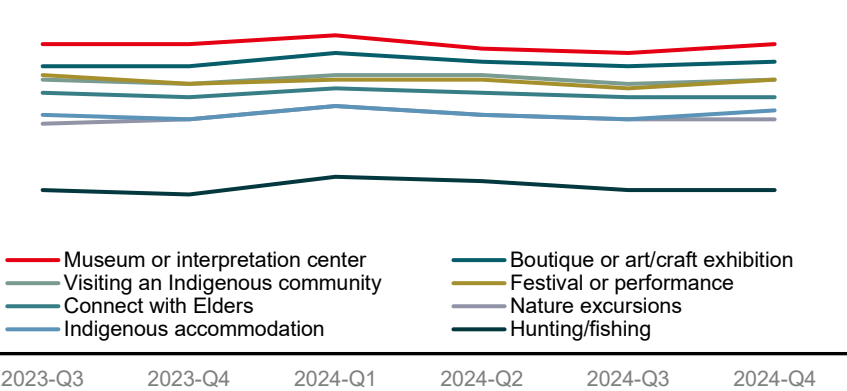
Question: In general, how well do you feel you know the Indigenous tourism and cultural offering in...?

Note: Data collection for this question began in June 2023.

## INTEREST IN INDIGENOUS TOURISM ACTIVITIES IN CANADA



### Indigenous Tourism Activity Interest Trends



#### 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?

Note: Data collection for this question began in June 2023.