



2020 Global Tourism Watch

Brand Metrics

Quebec



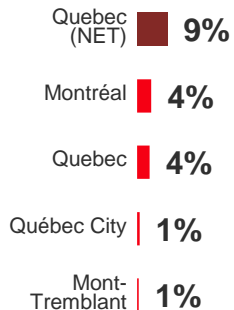
1.

Out-of-Province Tourism

GTW – November 2020

Quebec Brand Metrics – Summary (out-of-province)

Next Year Unaided Consideration* (S8) (n=4528)

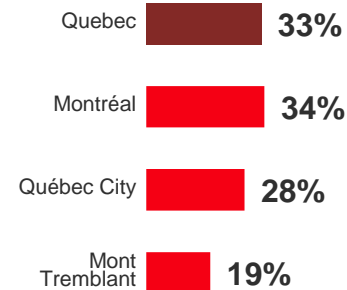


Note: Only destinations with 1% or more mentions shown.
+Answers not coded in the June/July/August waves (COVID tracker) – no trending.

Next Year Aided Consideration (BVC1a + BVC1b) (n=3775)

	June 2020	July 2020	August 2020	2020 GTW (November)
Quebec	30%	30%	29%	27%
Montréal	33%	32%	30%	25% ▼
Québec City	27%	26%	23%	20% ▼
Mont Tremblant	9%	11%	9%	10%

Destination Knowledge* – Top2Box (MP3)



+Not asked in the June/July/August waves (COVID tracker) – no trending.

NPS Among Past Visitors (MP11)

	June 2020	July 2020	August 2020	2020 GTW (November)
Quebec	+9	+9	+16	-6 ▼
Montréal	+28	+25	+24	+17
Québec City	+25	+25	+39	+12 ▼
Mont Tremblant	+5	+15	+22	+8 ▼

Path to Purchase (NET Active Planning) (MP1)

	June 2020	July 2020	August 2020	2020 GTW (November)
Quebec	12%	13%	12%	14%
Montréal	10%	15%	9%	14%
Québec City	10%	8%	13%	14%
Mont Tremblant	9%	9%	12%	10%

Quebec Brand Attributes – Summary (out-of-province)

Top 5 Impressions+ (MP5)

QUEBEC (n=696)



MONTRÉAL (n=410)



QUÉBEC CITY (n=410)



MONT TREMBLANT (n=411)



+Not asked in the June/July/August waves (COVID tracker) – no trending.

Note: Data is not comparable to the 2019 GTW due to a change in methodology.

Base: Domestic out-of-province pleasure travellers (past 3 years or next year) evaluating each destination

QMP5. We are interested in your general impressions about destinations, even if you have never been there. Please select all the destinations you think apply to the statement. Select None of these if you think none of the destinations apply.

Potential Out-of-Province Market Size

– Quebec (out-of-province)

Size of the Potential Out-of-Province Market for Quebec (Next Year)+

Total potential domestic out-of-province pleasure travellers aged 18+ (not including Quebec residents)

10,957,500



Target Market for Quebec

64%

Those in the dream to purchase stages of the path to purchase for Quebec

Size of the target market

7,024,000



Immediate Potential for Quebec

42%

Seriously considering travel to Quebec in the next year

Immediate potential

2,922,000



Note: Data is not comparable to the 2019 GTW due to a change in methodology.

Base: Target market for Quebec = domestic out-of-province pleasure travellers (past 3 years or next year) evaluating Quebec (n=696)

Base: Immediate potential for Quebec = dream to purchase stages for P2P for Quebec (n=405)

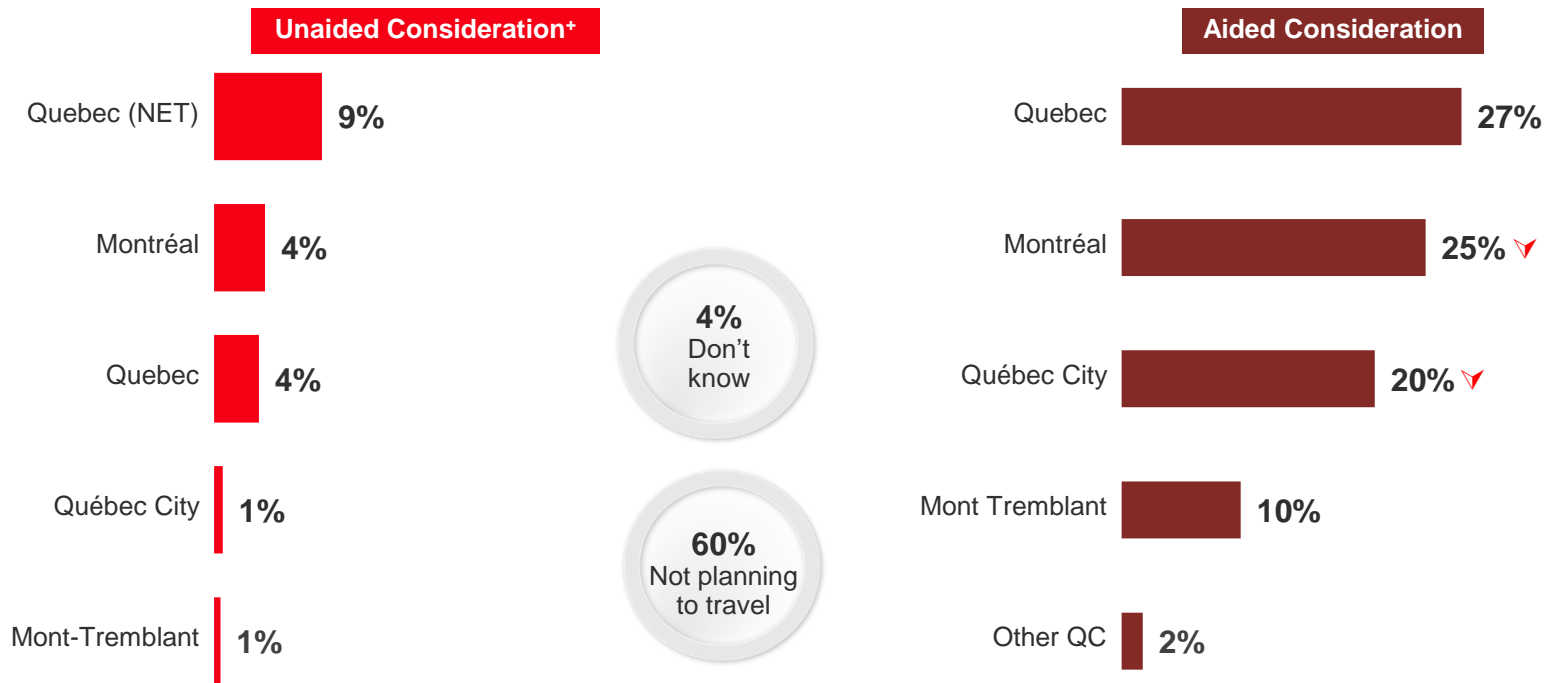
QMP1. Which of the following best describes your current situation when thinking about each of the following destinations for a vacation trip?

QBVC1a. You may have already mentioned this before, but which destinations would you seriously consider visiting in the next year?

▲ / ▼ Significantly higher / lower than August 2020 wave.

Unaided and Aided Consideration (Next Year)

– Quebec (out-of-province)



Base: Domestic out-of-province pleasure travellers (past 3 years or next year) (n=4528)

S8: You mentioned that you are likely to take a vacation trip of 2 or more nights outside of your own province, but within Canada in the next year. Which destinations are you seriously considering for your trips in the next year?

Base: Domestic out-of-province pleasure travellers (past 3 years or next year) excluding residents from each province (n=3775)

BVC1a. You may have already mentioned this before, but which destinations would you seriously consider visiting in the next 2 years?
BVC1b. You may have already mentioned this before, but which destinations would you seriously consider visiting in the next year?

Note: Only destinations with 1% or more mentions shown for unaided consideration.

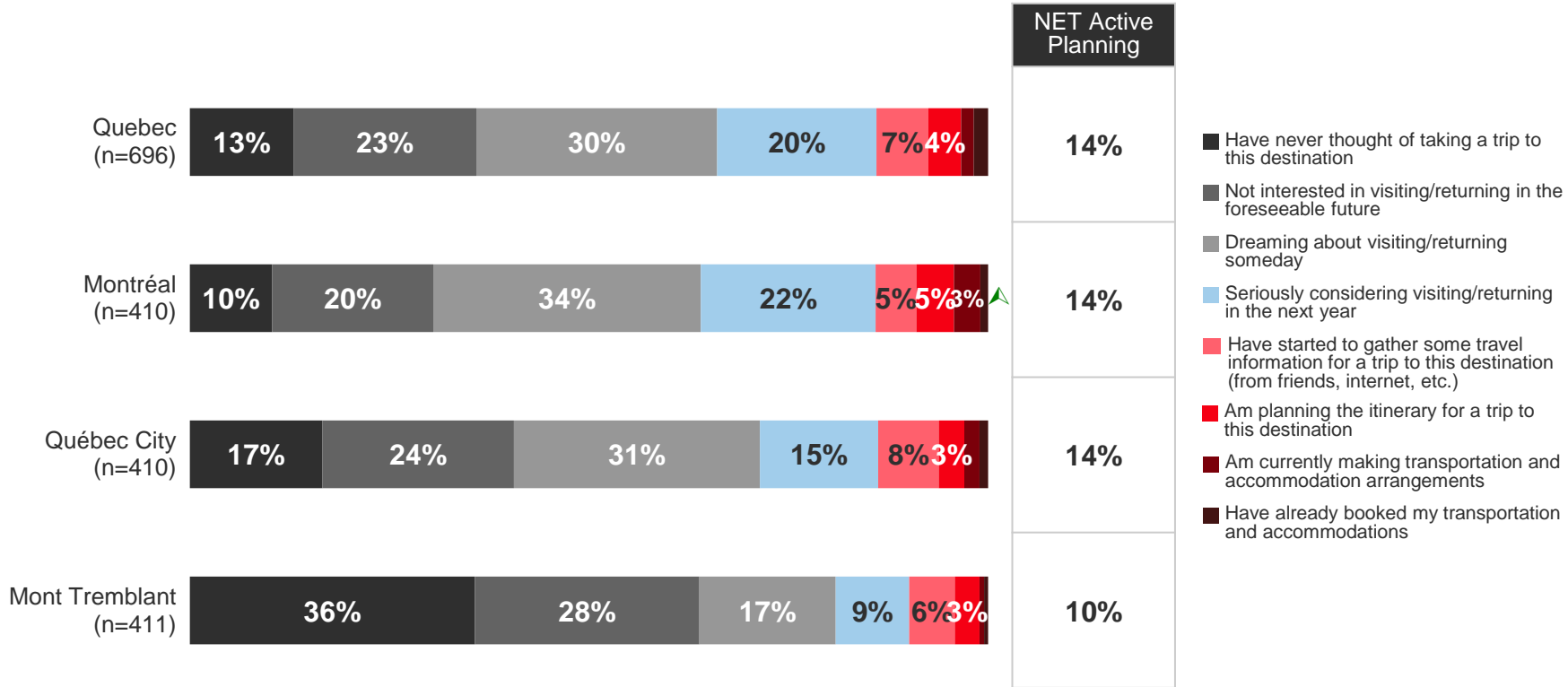
+Answers not coded in the June/July/August waves (COVID tracker) – no trending.

Note: Data is not comparable to the 2019 GTW due to a change in methodology.

Note: Unaided consideration is based to total sample and does not exclude residents from each province – respondents have the opportunity to type anything unaided and filtering out respondents who mention a destination in their own province would bias the data.

▲ / ▼ Significantly higher / lower than August 2020 wave.

Stage in the Purchase Cycle – Quebec (out-of-province)



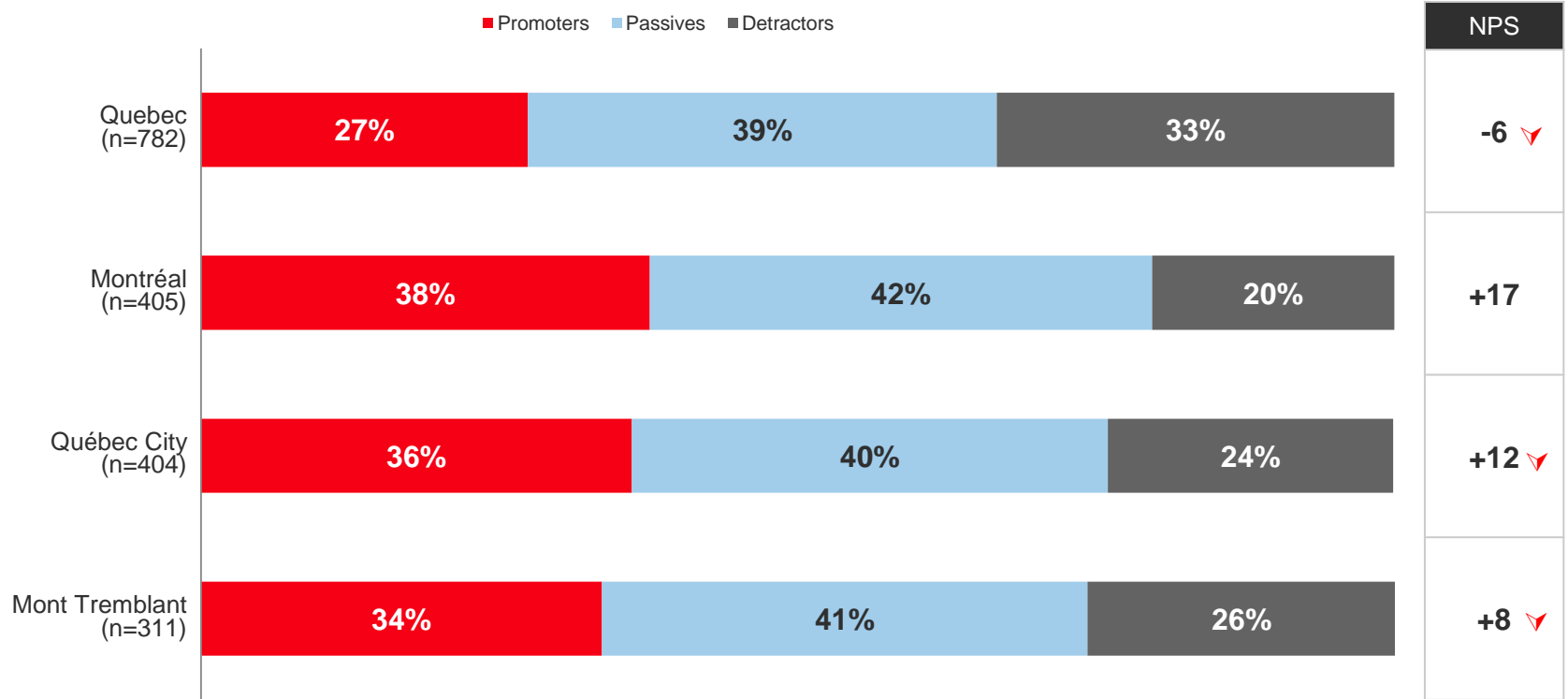
▲ / ▼ Significantly higher / lower than August 2020 wave.

Note: NET Active Planning = respondents who are gathering information, planning a visit, making arrangements, or already booked.

Base: Domestic out-of-province pleasure travellers (past 3 years or next year) evaluating destination

QMP1. Which of the following best describes your current situation when thinking about each of the following destinations for a vacation trip?

Net Promoter Score (NPS) – Quebec (out-of-province)

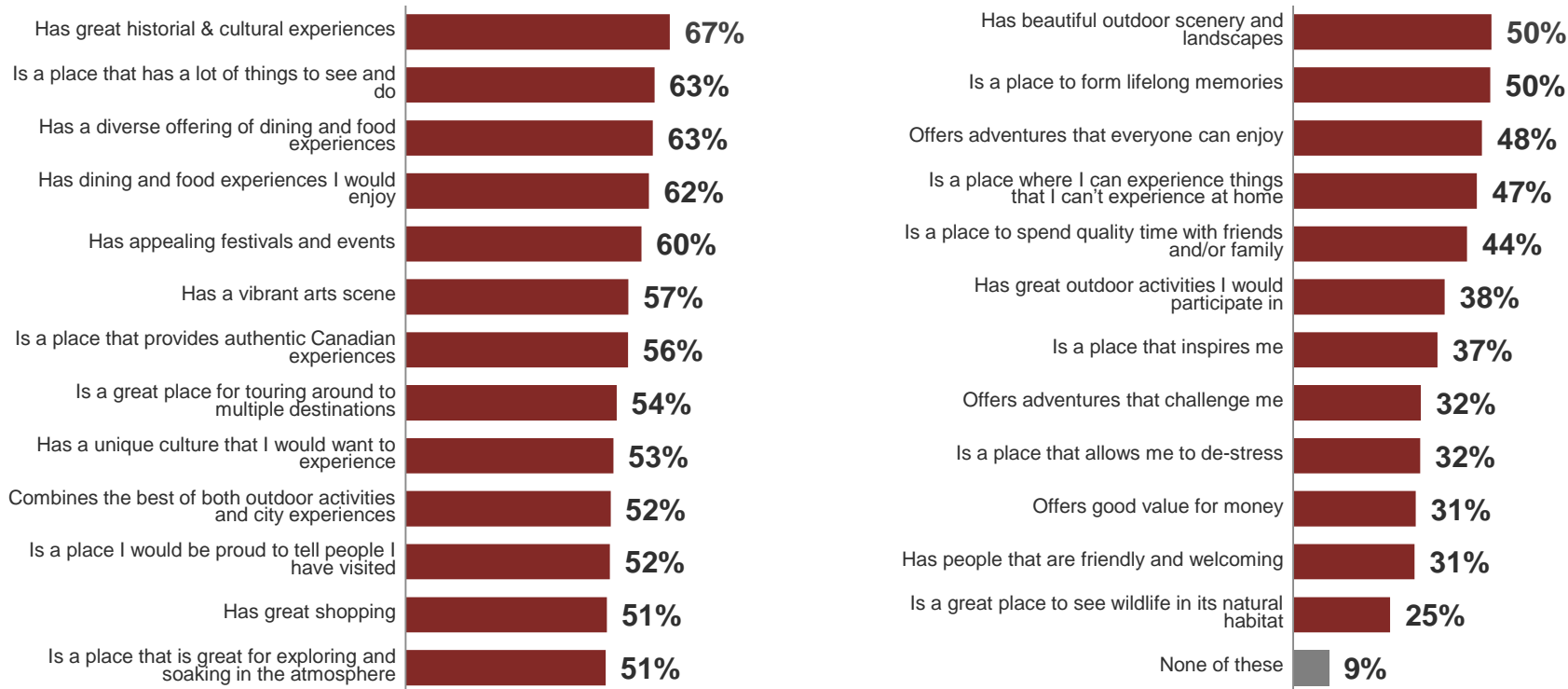


▲ / ▼ Significantly higher / lower than August 2020 wave.

Base: Domestic out-of-province pleasure travellers (past 3 years or next year) ever visited province/territory or destination

QMP11. Whether you have visited or not, how likely are you to recommend each of the following vacation destinations to a friend, family member or colleague?

Brand Attributes – Quebec (out-of-province)



+Not asked in the June/July/August waves (COVID tracker) – no trending.

Note: Data is not comparable to the 2019 GTW due to a change in methodology.

Base: Domestic out-of-province pleasure travellers (past 3 years or next year) evaluating Quebec (n=696)

MMP5. We are interested in your general impressions about destinations, even if you have never been there. Please select all the destinations you think apply to the statement. Select None of these if you think none of the destinations apply.

Brand Attributes – Relative Strengths & Weaknesses+

Attributes		British Columbia	Alberta	Saskatchewan	Manitoba	Ontario	Quebec	New Brunswick	Nova Scotia	Prince Edward Island	Newfoundland and Labrador	Yukon	Northwest Territories	Nunavut
Higher Order Motivations	Allows me to de-stress													
	Spend quality time with friends and/or family													
	Offers adventures that everyone can enjoy													
	Place to form lifelong memories													
	Place that inspires me													
	Proud to tell people I have visited													
	Adventures that challenge me													
Cities	Great shopping													
	A lot of things to see and do													
	Great for exploring and soaking in the atmosphere													
Tours/Journeys	Combines both outdoor activities and city experiences													
	Touring around to multiple destinations													
Outdoor	Outdoor activities I would participate in													
	Beautiful outdoor scenery and landscapes													
	Great place to see wildlife in its natural habitat													
Food	Dining and food experiences I would enjoy													
	Diverse dining/food experiences													
Culture	Great historical/cultural experiences													
	Unique culture I want to experience													
	Vibrant arts scene													
	Appealing festivals and events													
General	Good value for money													
	Authentic Canadian experiences													
	People are friendly and welcoming													
	Experience things I can't experience at home													

■ Shows significant (90% confidence level) strength ■ Shows significant (90% confidence level) weakness/opportunity

+Not asked in the June/July/August waves (COVID tracker) – no trending.

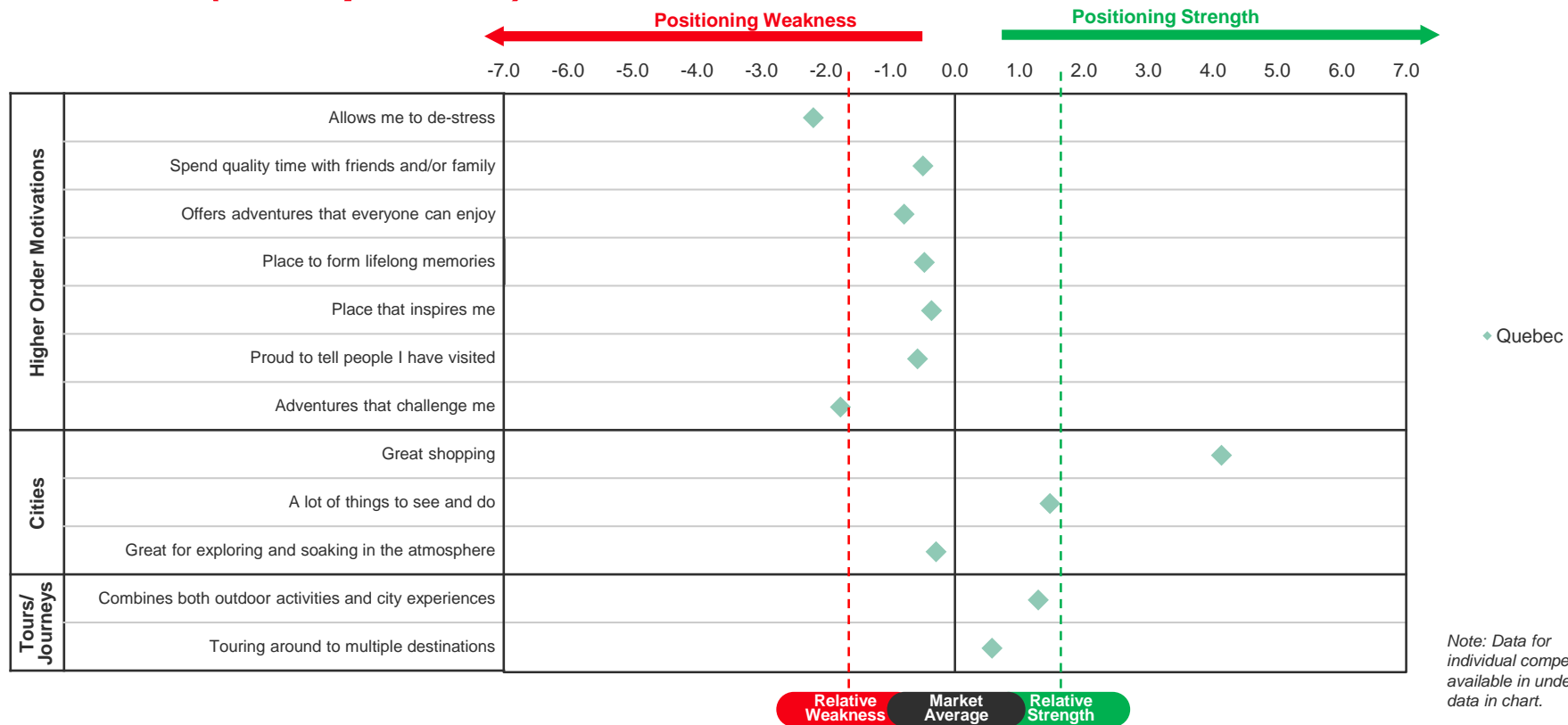
Note: Data is not comparable to the 2019 GTW due to a change in methodology.

Base: Domestic out-of-province pleasure travellers (past 3 years or next year) evaluating each destination

QMP5. We are interested in your general impressions about destinations, even if you have never been there. Please select all the destinations you think apply to the statement. Select None of these if you think none of the destinations apply.

Performance on Brand Attributes

- Quebec (out-of-province)



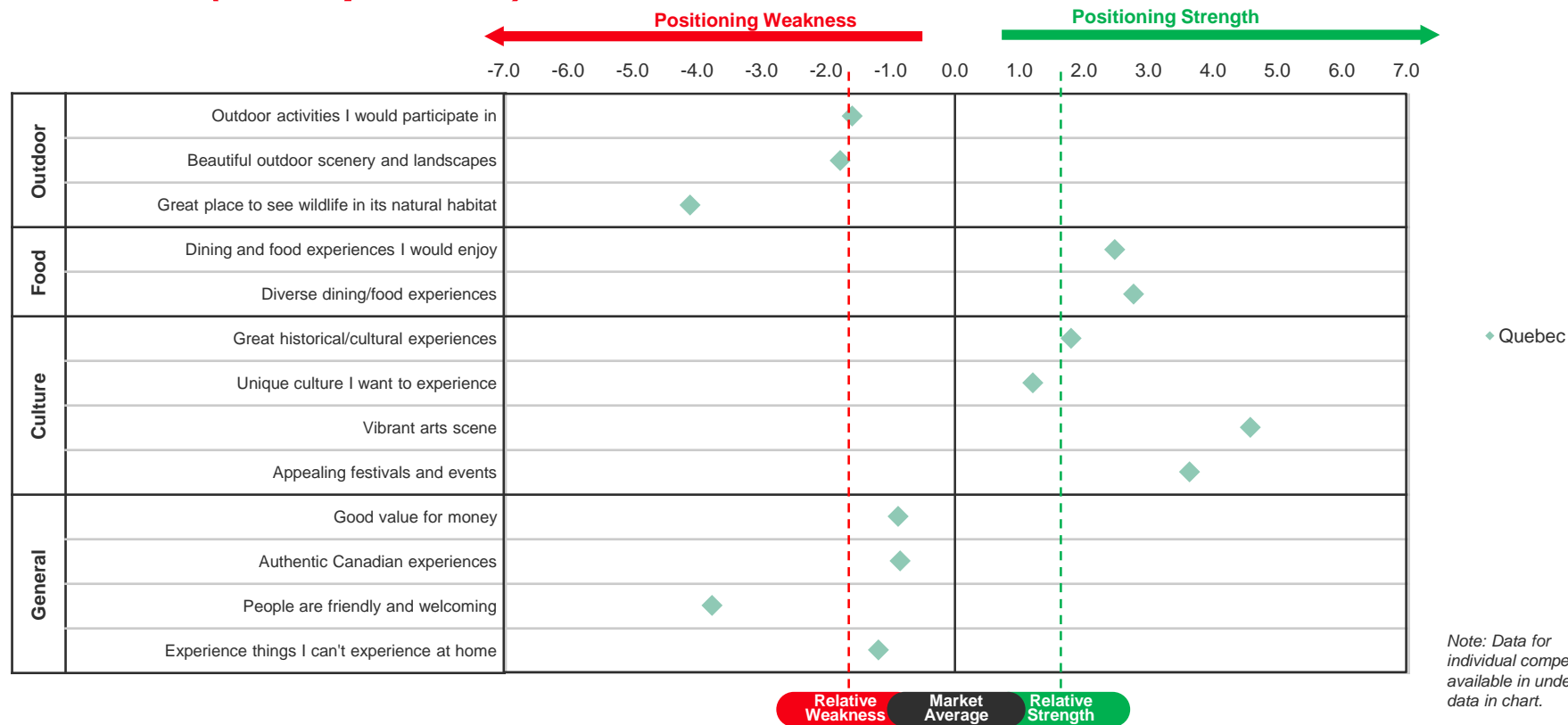
Note: Data for individual competitors available in underlying data in chart.

Relative Weakness | Market Average | Relative Strength

+Not asked in the June/July/August waves (COVID tracker) – no trending.
 Note: Data is not comparable to the 2019 GTW due to a change in methodology.
 Base: Domestic out-of-province pleasure travellers (past 3 years or next year) evaluating Quebec (n=696)
 QMP5. We are interested in your general impressions about destinations, even if you have never been there. Please select all the destinations you think apply to the statement. Select None of these if you think none of the destinations apply.

Performance on Brand Attributes (cont.)

- Quebec (out-of-province)-



Note: Data for individual competitors available in underlying data in chart.

Relative Weakness | Market Average | Relative Strength

+Not asked in the June/July/August waves (COVID tracker) – no trending.
 Note: Data is not comparable to the 2019 GTW due to a change in methodology.
 Base: Domestic out-of-province pleasure travellers (past 3 years or next year) evaluating Quebec (n=696)
 QMP5. We are interested in your general impressions about destinations, even if you have never been there. Please select all the destinations you think apply to the statement. Select None of these if you think none of the destinations apply.

2.

In-Province Tourism

GTW – November 2020

Quebec Brand Metrics – Summary (in-province)

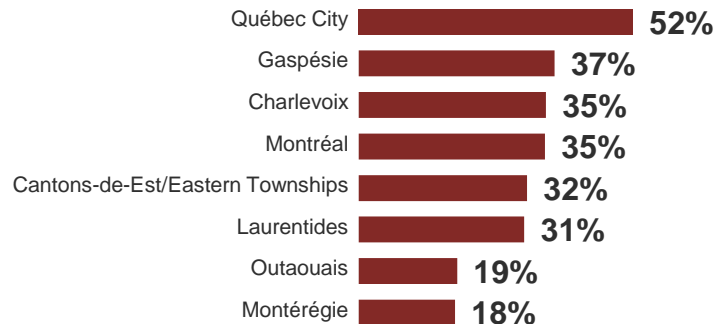
Next Year Aided Consideration

(BVC1b) (n=754)

	June 2020	July 2020	August 2020	2020 GTW (November)
Québec City	29%	23%	27%	31%
Charlevoix	23%	19%	25%	27%
Gaspésie	24%	19%	25%	25%
Cantons-de-Est/Eastern Townships	18%	13%	15%	21% ▲
Laurentides	17%	16%	14%	18%
Montréal	14%	11%	9%	12%
Outaouais	10%	7%	8%	10%
Montréal	8%	5%	5%	6%

Destination Knowledge+

– Top2Box (MP3)



+Not asked in the June/July/August waves (COVID tracker) – no trending.

NPS Among Past Visitors

(MP11)

	June 2020	July 2020	August 2020	2020 GTW (November)
Gaspésie	+47	+40	+35	+42
Charlevoix	+48	+31	+51	+40 ▼
Québec City	+30	+23	+33	+28
Cantons-de-Est/Eastern Townships	+35	+21	+23	+24
Laurentides	+22	+11	+25	+9 ▼
Outaouais	+6	-3	+6	-14 ▼
Montréal	-11	-11	-20	-24
Montréal	+0	-13	-9	-26

Path to Purchase (NET Active Planning)

(MP1)

	June 2020	July 2020	August 2020	2020 GTW (November)
Gaspésie	9%	10%	5%	9% ▲
Québec City	12%	10%	8%	8%
Charlevoix	9%	8%	7%	7%
Montréal	9%	8%	5%	7%
Outaouais	7%	3%	5%	6%
Cantons-de-Est/Eastern Townships	7%	7%	5%	6%
Laurentides	7%	7%	6%	6%
Montréal	4%	3%	4%	3%

▲ / ▼ Significantly higher / lower than August 2020 wave.

Quebec Brand Attributes – Summary (in-province)

Top 5 Impressions* (MP5)

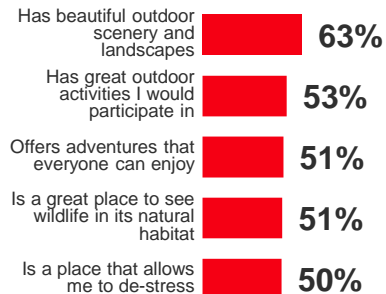
MONTRÉAL (n=471)



QUÉBEC CITY (n=471)



LAURENTIDES (n=471)



CHARLEVOIX (n=471)



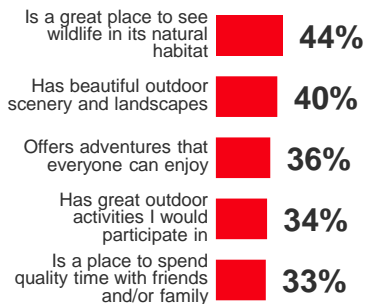
GASPÉSIE (n=472)



CANTONS-DE-EST/EASTERN TOWNSHIPS (n=471)



OUTAOUAIS (n=472)



MONTÉRÉGIE (n=471)



+Not asked in the June/July/August waves (COVID tracker) – no trending.

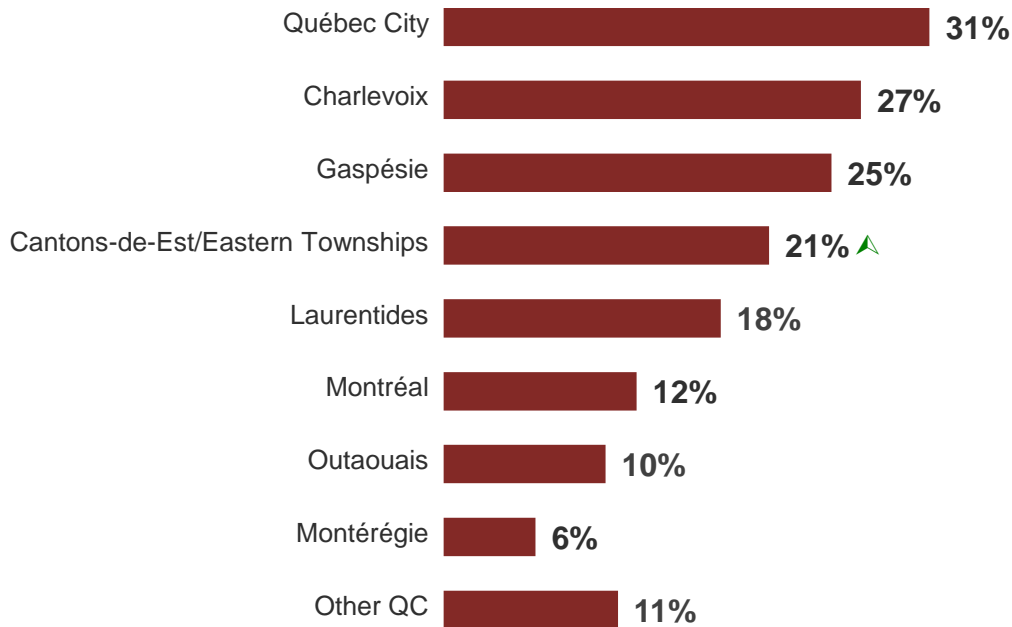
Note: Data is not comparable to the 2019 GTW due to a change in methodology.

Base: Respondents evaluating in-province destinations

QMP5. We are interested in your general impressions about destinations, even if you have never been there. Please select all the destinations you think apply to the statement. Select None of these if you think none of the destinations apply.

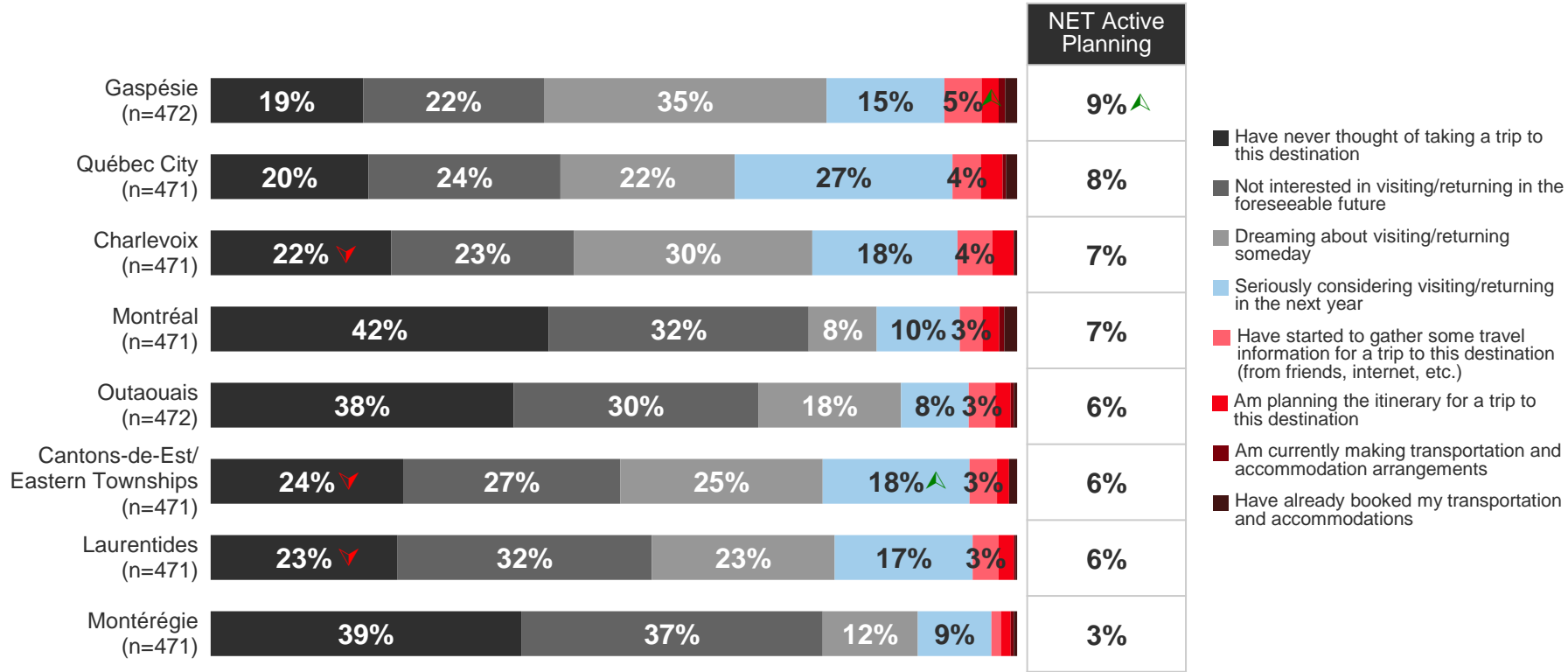
Aided Consideration (Next Year)

– Quebec (in-province)



Stage in the Purchase Cycle – Quebec (in-province)

CITW – NOVEMBER 2020



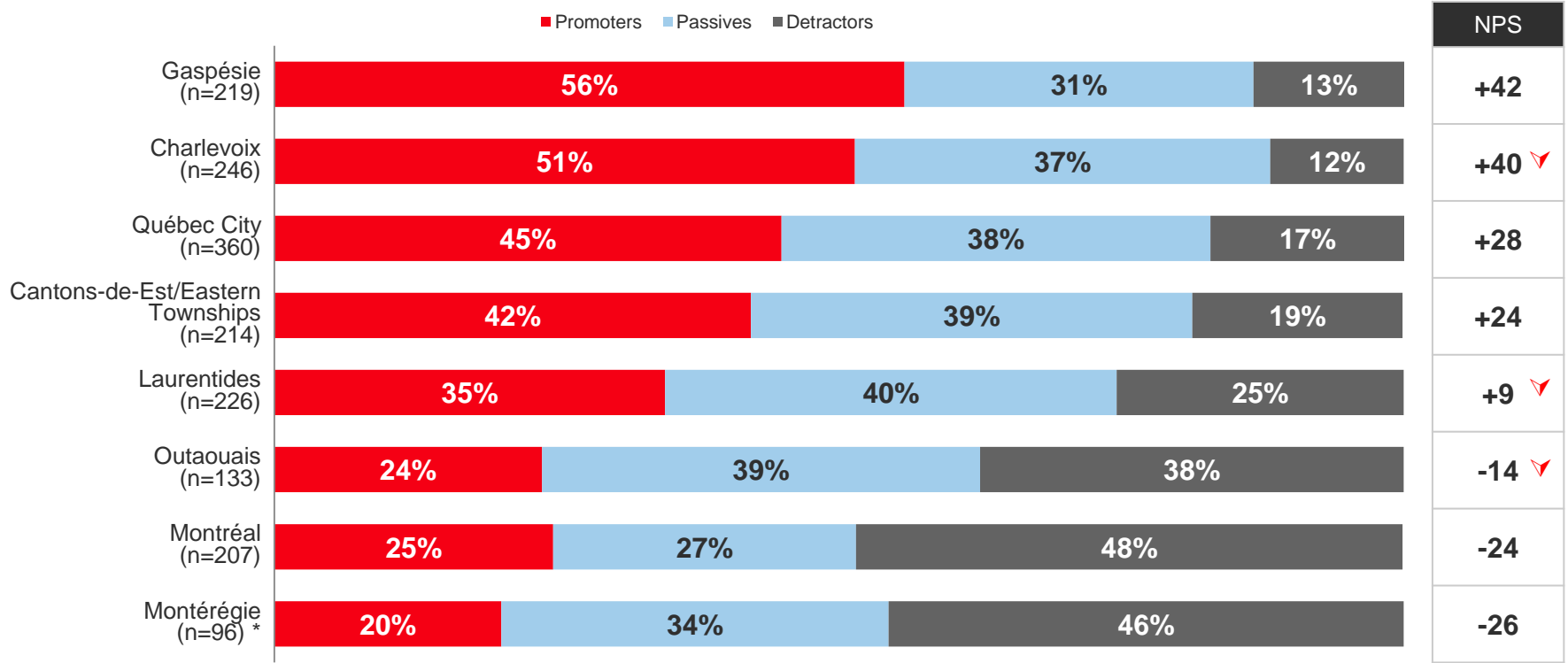
▲ / ▼ Significantly higher / lower than August 2020 wave.

Note: NET Active Planning = respondents who are gathering information, planning a visit, making arrangements, or already booked.

Base: Respondents evaluating in-province destinations

QMP1. Which of the following best describes your current situation when thinking about each of the following destinations for a vacation trip?

Net Promoter Score (NPS) – Quebec (in-province)



▲ / ▼ Significantly higher / lower than August 2020 wave.

* Small base size (<100), interpret with caution.

Base: Respondents ever visited in-province destinations

QMP11. Whether you have visited or not, how likely are you to recommend each of the following vacation destinations to a friend, family member or colleague?

Brand Attributes – Relative Strengths & Weaknesses+

Attributes		Montréal	Québec City	Laurentides	Charlevoix	Gaspésie	Cantons-de-Est/ Eastern Townships	Outaouais	Montréal
Higher Order Motivations	Allows me to de-stress	■	■		■				
	Spend quality time with friends and/or family								
	Offers adventures that everyone can enjoy								
	Place to form lifelong memories								
	Place that inspires me								
	Proud to tell people I have visited	■							
	Adventures that challenge me								
Cities	Great shopping	■	■		■	■		■	
	A lot of things to see and do	■							
	Great for exploring and soaking in the atmosphere								
Tours/Journeys	Combines both outdoor activities and city experiences					■			
	Touring around to multiple destinations								
Outdoor	Outdoor activities I would participate in	■	■	■			■		
	Beautiful outdoor scenery and landscapes	■	■	■	■				
	Great place to see wildlife in its natural habitat	■	■	■		■		■	
Food	Dining and food experiences I would enjoy	■	■						
	Diverse dining/food experiences			■		■			
Culture	Great historical/cultural experiences	■	■	■			■		
	Unique culture I want to experience			■		■			
	Vibrant arts scene	■	■	■	■	■		■	
	Appealing festivals and events	■	■		■	■	■	■	
General	Good value for money								■
	Authentic Canadian experiences								
	People are friendly and welcoming	■							
	Experience things I can't experience at home		■			■			

■ Shows significant (90% confidence level) strength ■ Shows significant (90% confidence level) weakness/opportunity

+Not asked in the June/July/August waves (COVID tracker) – no trending.

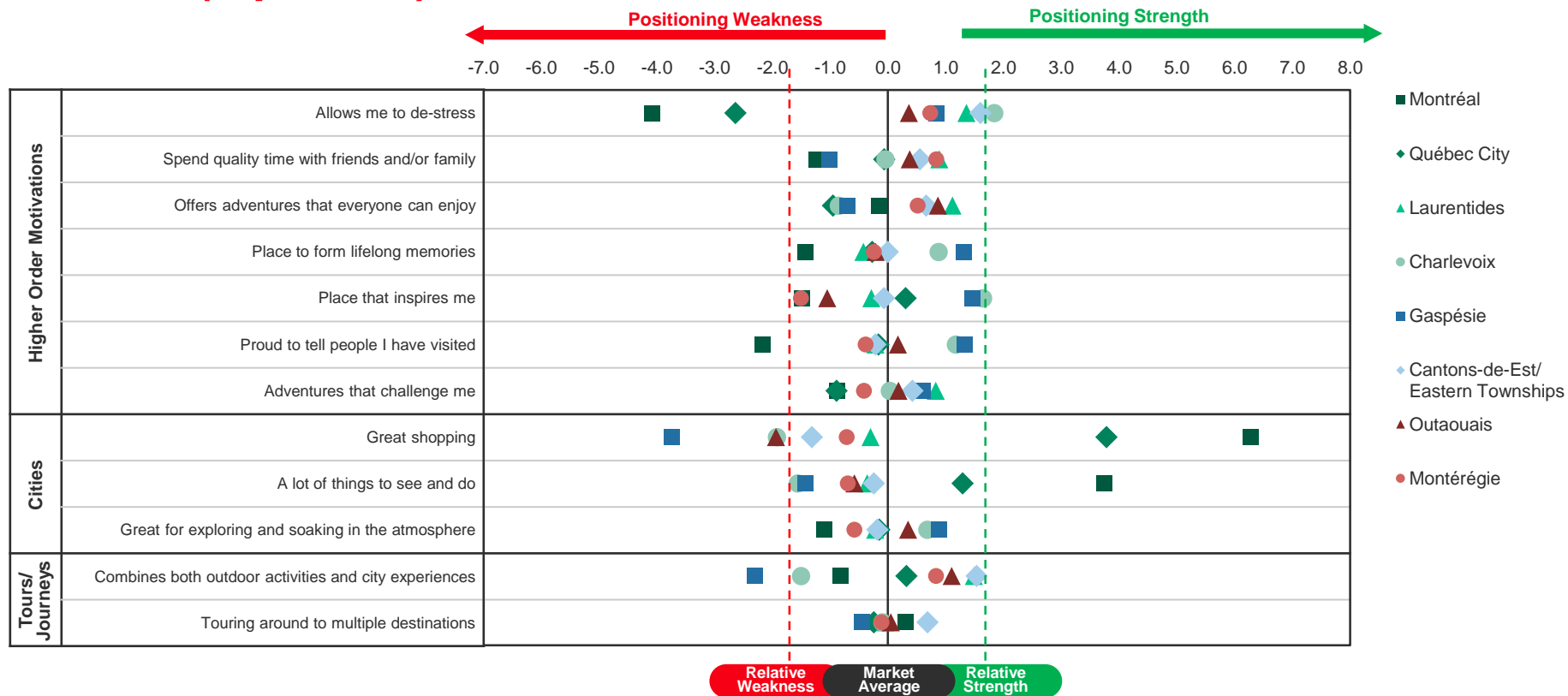
Note: Data is not comparable to the 2019 GTW due to a change in methodology.

Base: Respondents evaluating in-province destinations

QMP5. We are interested in your general impressions about destinations, even if you have never been there. Please select all the destinations you think apply to the statement. Select None of these if you think none of the destinations apply.

Performance on Brand Attributes

- Quebec (in-province)

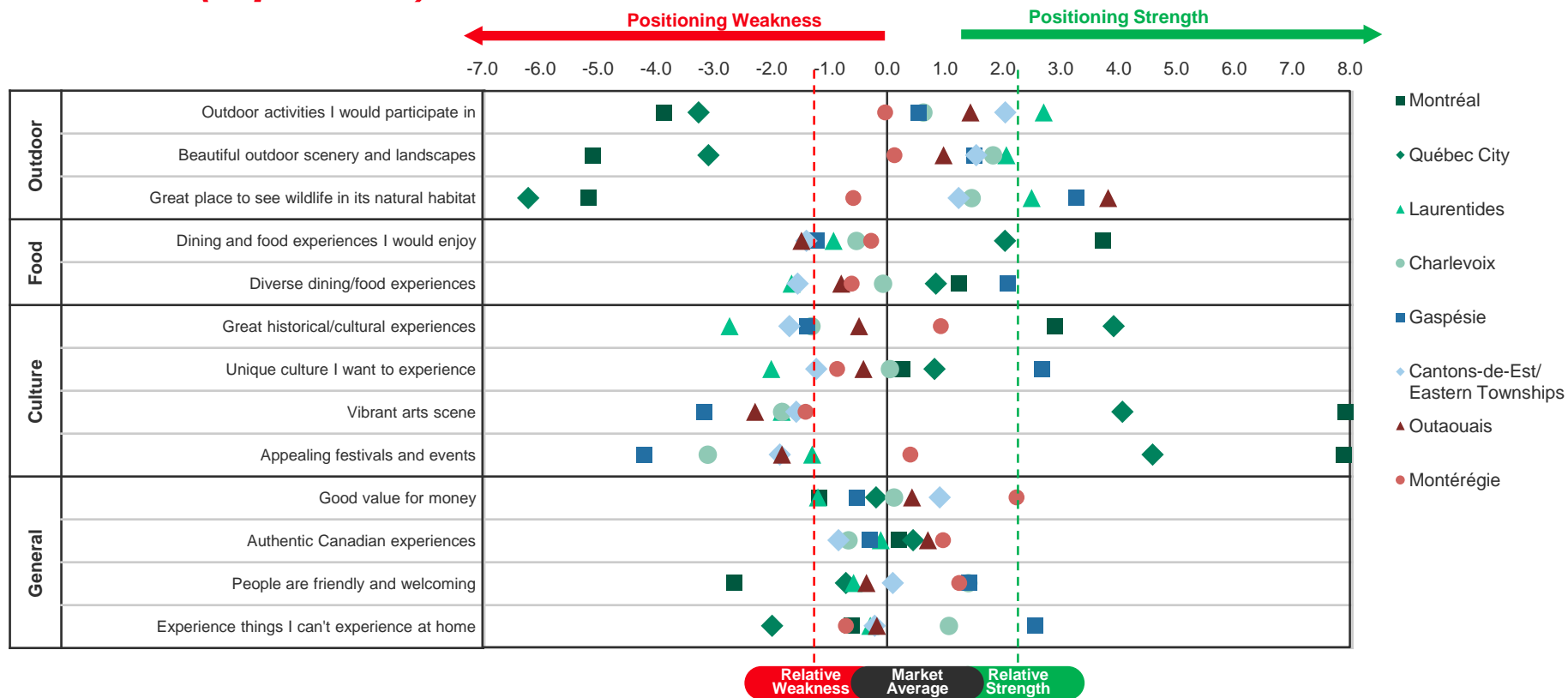


Relative Weakness | Market Average | Relative Strength

+Not asked in the June/July/August waves (COVID tracker) – no trending.
 Note: Data is not comparable to the 2019 GTW due to a change in methodology.
 Base: Respondents evaluating in-province destinations (n=471-472)
 QMP5. We are interested in your general impressions about destinations, even if you have never been there. Please select all the destinations you think apply to the statement. Select None of these if you think none of the destinations apply.

Performance on Brand Attributes (cont.)

- Quebec (in-province)



+Not asked in the June/July/August waves (COVID tracker) – no trending.
 Note: Data is not comparable to the 2019 GTW due to a change in methodology.
 Base: Respondents evaluating in-province destinations (n=471-472)
 QMP5. We are interested in your general impressions about destinations, even if you have never been there. Please select all the destinations you think apply to the statement. Select None of these if you think none of the destinations apply.