

2020 Global Tourism Watch Brand Metrics

Quebec



Canadä

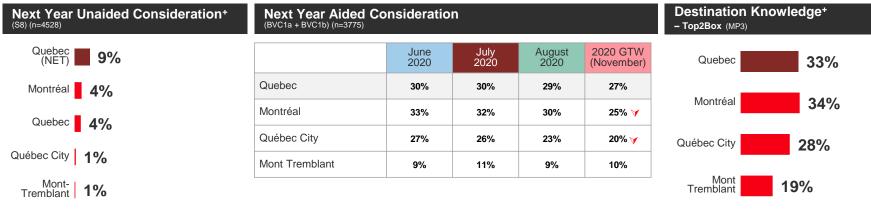


1. Out-of-Province Tourism

GTW – November 2020



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



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

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

Path to Purchase (NET Ac	tive Planni	ng)		
	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%

	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 🗸



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

Top 5 Impressions⁺



QUÉBEC CITY (n=410)



MONTRÉAL (n=410) Has a vibrant arts scene 70% Has dining and food experiences I would enjoy 68% Has a diverse offering of dining and food experiences 667% Has great historical & cultural experiences 66% Is a place that has a lot of things to see and do 66%

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.

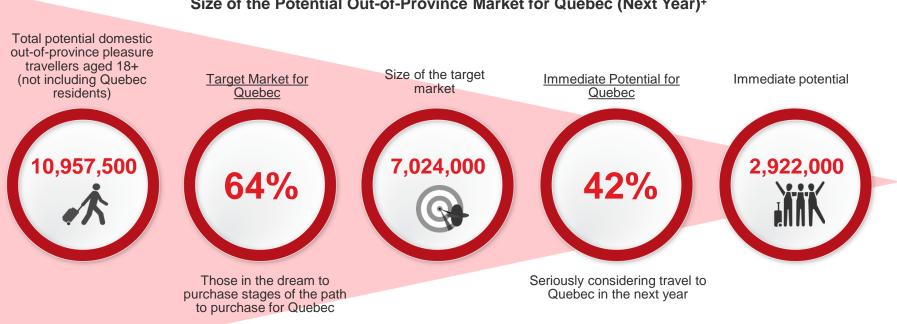
Base: Domestic out-of-province pleasure travellers (past 3 years or next year) evaluating each destination

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)*

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?



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 for your own province, but within Canada in the next year. Which destinations are you seriously considering for your trips 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.

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?



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



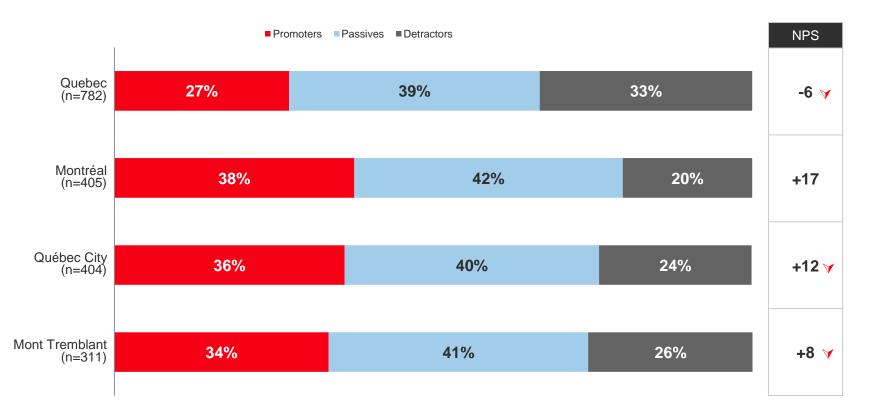
▲ / ¥ Significantly higher / lower than August 2020 wave.

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)+

Has beautiful outdoor scenery and landscapes
Is a place to form lifelong memories
Offers adventures that everyone can enjoy
Is a place where I can experience things that I can't experience at home
Is a place to spend quality time with friends and/or family
Has great outdoor activities I would participate in
Is a place that inspires me
Offers adventures that challenge me
Is a place that allows me to de-stress
Offers good value for money
Has people that are friendly and welcoming
Is a great place to see wildlife in its natural habitat
None of these
S S V S S V S S V S S V S S S V S S S S

67%	Has great historial & cultural experiences
63%	Is a place that has a lot of things to see and do
63%	Has a diverse offering of dining and food experiences
62%	Has dining and food experiences I would enjoy
60%	Has appealing festivals and events
57%	Has a vibrant arts scene
56%	Is a place that provides authentic Canadian experiences
54%	Is a great place for touring around to multiple destinations
53%	Has a unique culture that I would want to experience
52%	Combines the best of both outdoor activities and city experiences
52%	Is a place I would be proud to tell people I have visited
51%	Has great shopping
51%	Is a place that is great for exploring and soaking in the atmosphere

+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.

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Brand Attributes - Relative Strengths & Weaknesses+

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

Shows significant (90% confidence level) strength 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.

10

Performance on Brand Attributes - Quebec (out-of-province)

		-		P	osition	ing We	akness	5			Ро	sitionin	g Streng	th			
	-7	7.0	-6.0	-5.0	-4.0	-3.0	-2.0	-1.0	0.0	0 1.0	2.0	3.0	4.0	5.0	6.0	7.0	
	Allows me to de-stress						٠										
ions	Spend quality time with friends and/or family							4									◆ Quebec
Higher Order Motivations	Offers adventures that everyone can enjoy							٠									
ler Mo	Place to form lifelong memories																
er Orc	Place that inspires me							•	•								
Highe	Proud to tell people I have visited							٠	,								
	Adventures that challenge me						۲										
	Great shopping												٠				
Cities	A lot of things to see and do										•						
	Great for exploring and soaking in the atmosphere								•								Note: Data for individual compe
rs/ neys	Combines both outdoor activities and city experiences									•							
Tours/ Journeys	Touring around to multiple destinations									٠							
		-					Relat Weaki	tive ness	Mark Avera	ket R age S	elative trength						available in un data in chart.

Data for vidual competitors lable in underlving in chart.

+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 app

Performance on Brand Attributes (cont.) – Quebec (out-of-province)*

				P	osition	ing We	akness			Positioning Strength										
	-	7.0	-6.0	-5.0	-4.0	-3.0	-2.0	-1.0	0.0	1.0	2.0	3.0	4.0	5.0	6.0	7.0				
-	Outdoor activities I would participate in						•	•												
Outdoor	Beautiful outdoor scenery and landscapes	;									-									
õ	Great place to see wildlife in its natural habitat	t			٠						-									
pg	Dining and food experiences I would enjoy	/																		
Food	Diverse dining/food experiences	;										٠								
	Great historical/cultural experiences	;									٠									
ure	Unique culture I want to experience									٠										
Culture	Vibrant arts scene	•									1			•						
	Appealing festivals and events	;											•							
	Good value for money	/						٠												
eral	Authentic Canadian experiences	;						٠			ł									
General	People are friendly and welcoming				٠		1													
	Experience things I can't experience at home						!	٠			1									

Quebec

ote: Data for dividual competitors vailable in underlying ata in chart.

+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



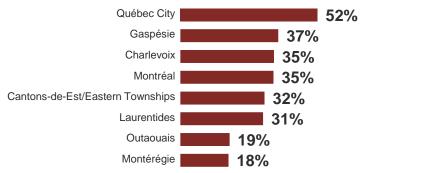
Quebec Brand Metrics – Summary (in-province)

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%
Montérégie	8%	5%	5%	6%

Destination Knowledge⁺

- Top2Box (MP3)



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

NPS Among Past Visitors

	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
Montérégie	+0	-13	-9	-26

Path to Purchase (NET Active Planning)

	June 2020	July 2020	August 2020	2020 GTW (November)
Gaspésie	9%	10%	5%	9% ٨
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%
Montérégie	4%	3%	4%	3%

Quebec Brand Attributes – Summary (in-province)

Top 5 Impressions+





GASPÉSIE (n=472) CANTONS-DE-EST/EASTERN TOWNSHIPS (n=471) Has beautiful outdoor 78% Has beautiful outdoor 62%

18%	scenery and landscapes
70%	Is a great place to see wildlife in its natural habitat
66%	Has people that are friendly and welcoming
64%	Is a place to form lifelong memories
62%	Is a place that allows me to de-stress
62%	Is a place I would be proud to tell people I have visited

62%	Has beautiful outdoor scenery and landscapes
53%	Is a place that allows me to de-stress
51%	Has great outdoor activities I would participate in
50%	Offers adventures that everyone can enjoy
49%	ls a place to spend quality time with friends and/or family



OUTAOUAIS (n=472)

habitat

44%

40%

36%

34%

33%

Is a great place to see

Has beautiful outdoor

Offers adventures that

quality time with friends

everyone can enjoy

Has great outdoor

activities I would

participate in Is a place to spend

and/or family

scenery and landscapes

wildlife in its natural

CHARLEVOIX (n=471)



MONTÉRÉGIE (n=471)



CANADA`

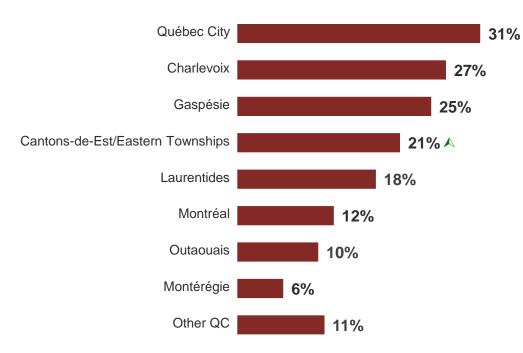
+Not asked in the June/July/August waves (COVID tracker) - no trending.

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

15 Base: Respondents evaluating in-province destinations

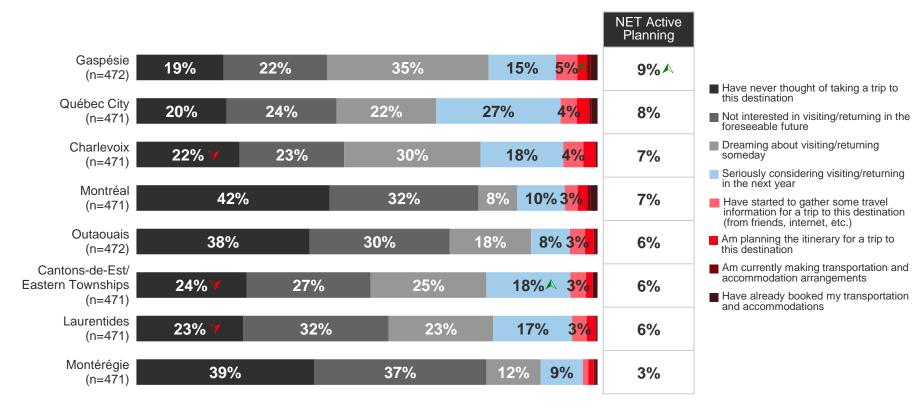
QMP5. We are interested in your general impressions about destinations, even if you have never been there. Please select all the destinations you think apply to the statement. Select None of these if you think none of the destinations apply

Aided Consideration (Next Year) - Quebec (in-province)





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



17

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

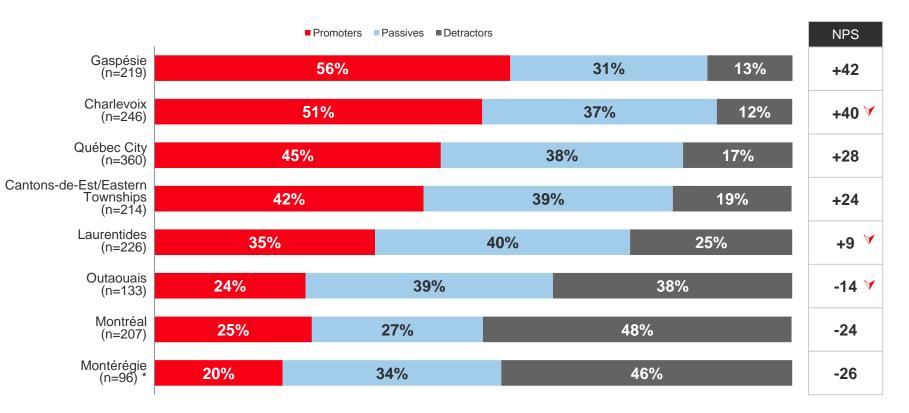
Note: NET Active Planning = respondents who are gathering information, planning a visit, making arrangements, or already booked.

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?



18

Brand Attributes - Relative Strengths & Weaknesses+

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

Shows significant (90% confidence level) strength Shows signification

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.

19 Note: Data is not comparable to the 2019 GTW due to a 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)*

	-	Positioning Weakness Positioning Strength	
	-7.	0 -6.0 -5.0 -4.0 -3.0 -2.0 ₁ -1.0 0.0 1.0 2.0 3.0 4.0 5.0 6.0 7.0	8.0
	Allows me to de-stress		Montréal
ions	Spend quality time with friends and/or family		 Québec City
otivat	Offers adventures that everyone can enjoy		▲ Laurentides
Higher Order Motivations	Place to form lifelong memories		Charlevoix
er Ord	Place that inspires me		■ Gaspésie
High	Proud to tell people I have visited		
	Adventures that challenge me		 Cantons-de-Est/ Eastern Townships
	Great shopping		▲ Outaouais
Cities	A lot of things to see and do		 Montérégie
	Great for exploring and soaking in the atmosphere		
irs/ neys	Combines both outdoor activities and city experiences]
Tours/ Journeys	Touring around to multiple destinations		
		Relative Weakness Average 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)

20 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)*

	4	Positioning Weakness								Positioning Strength								
	-7.	0 -6.0	-5.0	-4.0	-3.0	-2.0	1 .0	0.0	0	1.0	2.0	3.0	4.0	5.0	6.0	7.0	8.0	
r	Outdoor activities I would participate in				•		-											Montréal
Outdoor	Beautiful outdoor scenery and landscapes				٠		1											 Québec City
ō	Great place to see wildlife in its natural habitat	٠					•											▲ Laurentides
pc	Dining and food experiences I would enjoy										٠							o Oh a share i s
Food	Diverse dining/food experiences					4)									 Charlevoix
	Great historical/cultural experiences									•			٠					Gaspésie
ure	Unique culture I want to experience						••			•								 Cantons-de-Es
Culture	Vibrant arts scene												٠					Eastern Towns Outaouais
	Appealing festivals and events					1	Á							•				
	Good value for money									•								 Montérégie
eral	Authentic Canadian experiences																	
General	People are friendly and welcoming																	
	Experience things I can't experience at home					•												

+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.

21