



Increasing the quality, value, effectiveness, and use of research in travel marketing, planning, and development

WELCOME AND MEMBER SPOTLIGHT FROM SCOTT JOHNSON

By: Scott Johnson, Co-Founder, XBorder Canada and CEO, Travel Market Insights Inc.

It is great to see the TTRA community keeping the Northeast TTRA members informed. Last week the US Travel Association's IPW started on a positive note with the new international travel policies that open the U.S. for more visitors.



Everyone in the travel research field is working to understand and navigate this ever-changing travel environment. Overwhelmingly, reports highlight incredible pent-up demand for travel. In particular, demand to visit family and friends and to just get back out there and travel – even if primarily local for now. However, safety and policy remain real challenges to fully opening travel as the pandemic drags on.

Given Canada is a key part of nearly all states' visitor mix, we are pleased to give the NETTRA an update on the XBorder Canada (XBC) programs.

XBorder Canada was established to provide all 50 states/territories/select cities with Canadian visitor volumetrics and comprehensive visitor profiles so our destination partners can effectively promote and measure the Canadian visitor impact.

The XBC program expanded when our partner's needs changed due to the pandemic. The first step for most was to establish a benchmark that was pre-Covid, i.e., 2019 year-end visitor profile (and historical Canadian metrics).

To be competitive in the new normal our destination partners needed to understand what the norm was for their destination. XBC provided the only comprehensive (all 50 states/territories/select cities/), comparable, and verifiable destination-specific Canadian visitor profiles for 2019 and past years. This included a profile of both land and air visitors by destination along with the total visitor profile by destination.

After establishing the 2019 visitor profile (benchmark), XBC then tracked 2020 and 2021 visitation, which was very minimal after first quarter 2020. Throughout 2020 some visitors continued to visit despite restrictions and inconveniences/quarantines, etc.

Canadians could technically still visit by air, and those who wanted to still drive found very creative ways to visit – such as taking a helicopter and having a moving company transport their car/RV across the border so they could continue their journey by land.

Given 2020 and 2021 are anything but normal, industry partners wanted to understand the future travel intentions of Canadians – with a lot of destinations recognizing that auto travel may regain share more quickly once travel resumes. In addition, many recognized that Canada is likely to dominate as the primary international visitor source for nearly all states coming out of the pandemic.

This need led XBC to expand its mission to understand Canadian travelers that were planning to visit the U.S. – their future travel intentions. There was a lot of data out there that was good Gen-pop data – all travelers and non-travelers including domestic and total international. But no one was reporting on the Canadian travelers planning to visit the U.S. specifically.

XBC was the only source that could re-survey Canadians that were planning to visit in 2020 (pre-pandemic). To meet our destination partners needs XBC established a marketing-driven survey series – the *Canadian Future Travel Intentions Survey*. The *Canadian Future Travel Intentions Survey* profiles Canadians planning to visit the United States. The survey series provides insight on how visitors use information sources to plan their visit to the U.S., how they will travel (land or air), the barriers that are keeping them from traveling to the U.S., when they will travel, and more.

The US Travel Association featured results from our first *Canadian Future Travel Intentions Survey* (released in June) as an industry update in their “*Inbound Market profile: Canada 2020/21*.”

https://www.ustravel.org/system/files/media_root/document/Research_Market_Profile_Canada_0.pdf.

The current ever-shifting Covid situation (unknowns) highlighted key weaknesses in existing forecasting models for airlines, airports, travel trade, and destinations. The XBC team, working with TMII, is developing a model using relevant and validated “visitor” data along with other key economic, Covid-related, and policy indicators to establish an adjustable monthly forecast for year-end visitor projections for all states and select cities. Not only will we be able to effectively report visits but also forecast visits as travel surges from Canada and all major countries. One new forward-facing resource is the TMII/XBC Google Travel Booking Survey – specifically for Canadian travelers booking travel to the United States, and other top international visitor countries.

As part of our ongoing XBC efforts, we worked on a project tied to FEMA that required us to report all travel by Canadian residents to all states including border-state ‘day travelers’ and ‘day visitors’ (definitionally quite different). This of course has a substantial impact for some border states in the Northeast and along the U.S. Canada border, where the border closure has had a significant impact.

Covid also impacted the Canadian Travel Trade. This led to XBC establishing the Canada Travel Trade Panel. The first survey will be launched just before travel resumption (October/November 2021).

To bring things full circle, XBC/TMII partnered with Dean Runyan Associates to establish the first ever country economic impact reports.

The country impact report provides destinations with the ability to assess and report jobs, payroll, taxes, and segment impact by country for our destination partners, making it directly comparable to other countries and to domestic visitor impact.



Canadian-owned sail boats dry docked at NY Marina due to COVID, summer 2021.

I will leave you with this, a mentor of mine encouraged me to provide a positive kernel – no matter what. That’s a tall order based on some headlines. However, within the threads of data and analysis we know demand for travel (from Canada and overall) is substantial. But also, perhaps just as important, there is a heightened understanding of travel ‘as an industry’ within our communities. Research has taken center stage, and I look forward to TTRA and NETTRA members leading the industry’s recovery and the way forward.

Here is a summary of the XBC Programs for 2022:

- ✓ 2022 XBC Canadian Visitor Survey – comprehensive visitor profiles for all 50 states/territories and select cities/regions.
 - Custom questions available
 - Quarterly/Seasonal reports
- ✓ 2021 and 2020 XBC State/City Visitor Profile (pandemic era data), with land and air profiles.
- ✓ 2019 XBC State/City Visitor Profile (benchmark data), with land and air profiles.
- ✓ 2020 and 2021 volumetrics for states/cities/territories.
- ✓ Canadian Future Travel Intentions Survey Series:
 - Survey one (available now)
 - Second survey scheduled for October/November 2021 (conducted when travel opens). Custom questions available.
 - Third and ongoing survey schedule TBD
- ✓ Forecast - adjusted monthly to reflect realistic outcomes (by land and air).
- ✓ XBC Canada Travel Trade Panel (conducted with travel resumption).
 - Custom questions available
- ✓ XBC state/city visitor impact reports (available now for 2019, 2020).

To learn more about how XBC programs can align with your destination’s goals to build back better, contact Scott and the XBC team:

Email: scott@xbordercanada.com or visit <https://www.xbordercanada.com/>.

SAVE THE DATE: 2ND ANNUAL NETTRA CONFERENCE

THURSDAY, JANUARY 20TH, 2022

By: Lynn Minnaert, Clinical Associate Professor and Academic Chair, New York University

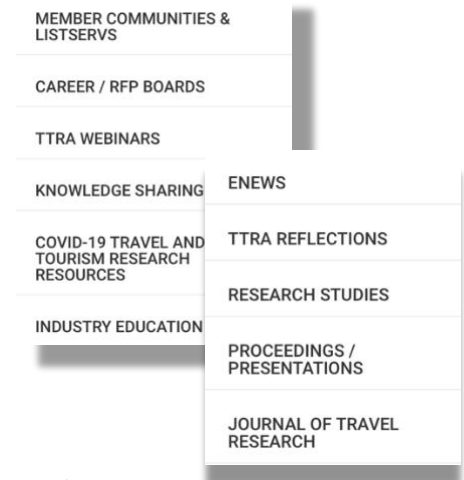
Our Second Annual NETTRA Conference will take place on Thursday January 20th. Please save the date and join us for networking, research updates and best practices from across the region! We are also looking for research submissions. More details will follow soon.

RESEARCH HIGHLIGHT – TTRA MEMBER RESEARCH TOOLS

By: Stephen Braun, NETTRA Communications Chair

This month we would like to review the significant number of research tools and resources available with a TTRA membership, especially as we continue to navigate somewhat uncharted territory as an industry. The TTRA website contains two, broad areas with those elements:

- 1. Member Resources.** This area of the TTRA website includes a number of community, research, and education postings along with community-focused options such as knowledge sharing and RFP and Career postings. The LISTSERV functionality on the website is a great way to ask a pressing question then colleagues with respond with their experience or to point one in the right direction for more information. There is also a robust amount of data related to COVID-19.
- 2. Insights.** This area the TTRA website features the latest and greatest tourism research findings whether actionable now or insight into the future of tourism. Copies of many presentations for TTRA proceedings are also stored here for download and further professional use. Finally, members will find the most current and also past editions of the *Journal of Travel Research* which contains important and timely information for all sectors of the industry.



Reminder: By joining TTRA and specifying the Northeast Chapter as a location, a portion of your annual TTRA dues is credited to the Northeast Chapter for its programs, including the annual NETTRA winter conference. Any current members of TTRA based in the Northeast who have not made a chapter selection in the past year should confirm Northeast membership to TTRA in their profile which will ensure we receive credit for all existing memberships.

TTRA MARKETING OUTLOOK FORUM

New dates for the **TTRA Marketing Outlook Forum** are February 7-9, 2022. The Bethesda MD location for the conference has not changed. For more information about this highly recommended conference, including the schedule, sponsorships opportunities, and safety protocols, please visit the [conference home page](#).

CALL FOR FUTURE EDITIONS OF YOUR NETTRA NEWSLETTER

We are always looking for ways to feature our members and provide broader exposure for their accomplishments, initiatives, and research. We would like to feature YOU! Please don't hesitate to contact us to explore some ideas. Newsletters through 2022 will be issued quarterly.

Past editions of the NETTRA newsletter may be found on our NETTRA website: <https://www.nettra.org/newsletter> . We look forward to hearing from you.