



Year End 2023

Introduction

XBorder Canada (XBC) is the largest ongoing monthly survey of Canadian visitors traveling to the United States. XBC provides the U.S. Department of Commerce, National Travel and Tourism Office with an annual profile of Canadian land visitors to the United States. XBC is a syndicated product produced by XBorder Research Group, a partnership between Travel Market Insights Inc. and DataPath Systems.

Starting in 2018, XBorder Research Group launched the XBC program to provide United States, state, and select city visitor volumetrics (visits, spending, nights) and in-depth comprehensive visitor profiles that Statistics Canada historically reported prior to 2018.

The following 2023 annual report provides volumetrics and visitor profiles for Overnight visitors only. The XBC program also collects Day visitor volume and Day non-visitor volume. XBC can integrate the Day visitor data into reports for states as a special custom data report. For additional XBC programs, please see the XBC Product Tab in this report or visit: <https://www.xbordercanada.com/our-programs>.

Methodology

XBorder Canada provides subscribers with trusted confidence that the Canadian visitor volumetrics and profiles are based on proven statistical methodologies.

XBC's methodology has been vetted by national, state, and city industry leaders. For example, The U.S. Department of Commerce, National Travel and Tourism Office conducted extensive vetting of the XBC methodology, including a global review of other resources and methodologies. The result, USDOC, NTTO designated XBC (starting in 2021) as the official source for Canadian visitor profiles to the U.S. and for state-level reporting for Canadians visitors by land. Similarly, XBC is the primary source meeting FEMA data needs regarding Canadian volumetrics to all U.S. states and territories annually.

Visit Florida conducted a vetting process of XBC's methodology, using an economist panel, resulting in confirming XBC as the official Canadian visitor source for Visit Florida – providing Canadian volumetrics and profiles for the state quarterly and annually.

In 2023 XBC completed the survey program by implementing a monthly multiple-panel approach. In 2023 109,943 total Canadians were surveyed. Of those, 14,609 had taken a trip to the U.S. in 2023 and are included in this report. Based on a representative sample the Margin of Error (ME) would be +/- 0.30 on the total sample at a 95% confidence level. For most subgroups reported the ME ranges from +/- 0.30 to +/- 3.0 at a 95% confidence level.

In the survey a trip was defined as: A trip is defined as: when you visited anywhere in the United States (including Puerto Rico/Virgin Islands/U.S. Territories) for any type of non-routine, non-essential trip (leisure, personal, business, pass-through, etc.) which was 100 km from home and not just for routine errands or for your regular job/work commute. A trip can include day-trips and overnight trips. Include trips even when you only changed planes, or boarded a cruise ship in the U.S. Please, do not include routine or essential trips such as commuting to/from work or school, school lasting 90+ days, or trips taken as a flight attendant or commercial vehicle operator.

Data Weighting

Data weighting is comprehensive and involves three steps at the national level:

Step One: It matches the panel respondents (travelers and non-travelers) back to Canadian census data on key demographics for: Age, Province/Territory, Gender, Children at Home, Rural/Urban, Employment, Home Ownership, and Language (known factors that impact travel).

Step Two: Next, it matches travelers to Statistics Canada Frontier and National Travel Survey Data by: Changing Planes and Exiting the U.S., Month of Travel, Border Crossing Entry Point, Length of Stay in the U.S., and Land/Air/Sea by Day/Overnight by Quarter of Trip End Date. (As Frontier Data includes auto travel that is for routine/commuter traffic, that count is reduced based on the National Travel Survey Data – by month and east/west ports of entry).

Step Three: the data is projected to the total number of visitors using Statistics Canada's Frontier Data and National Travel Survey Data. Final data counts match the Statistics Canada reports and the U.S. I-94 reports (overnight counts).

State and City Volumetrics

XBC created a Volumetric Model at the state level, using national, regional, and historical Statistics Canada data as key model inputs. This model also considers the overlapping volumes between states – as one visitor may account for multiple state visits. The model follows the following process:

Step One: A Historical Over/Under Score (OUS) is calculated and applied to each state. This OUS is based on eight years of historical Statistics Canada data, which provides a score for each region, and then each state, based on how that region/state compared to the national shifts in visitors. For example, if the U.S. is down 4%, how did state X compare? Removing outliers, each state is given an OUS for their typical change, as it relates to the national change.

Step Two: Starting with regions across the U.S., the current year is predicted for the region using the previous year's volumes and OUS. That predicted result is then compared to survey data results. Subsequently, an Optimizer Tool is employed to balance the regions to ensure they fall between the predicted value and the survey results. Once the region's total volume is determined, a similar step is repeated for the states within that region, which results in a final visitor volume estimate (overnight and then repeated for day visitors) for each state. Results are further optimized to account for overlap between cities within that state.

Important Data Updates

The following highlights important data updates and improvements to the XBC program that should be noted.

XBC's status as the USDOC, NTTO official source for Canadian land visitors to the U.S. and state-level data required some questionnaire adjustments to advance reporting in the survey that improves compatibility to the USDOC, NTTO SIAT survey questionnaire and output for overseas countries. For additional details on the questionnaire improvements, please contact XBC.

The need for improved weighting and volumetric modeling was driven by two major changes in the data available from Statistics Canada. First, in 2018 Statistics Canada stopped collecting any information at the state level (they never provided data at the city level). That change initiated the start of XBC, and a private sector replacement. Data run and provided to clients for the 2018 year was weighted using 2018 Statistics Canada national Frontier data.

However, in 2019 Statistics Canada underwent additional survey and methodological changes that then impacted the national data. Please note the following statement from Statistics Canada: "keep in mind when analyzing Frontier Counts results, as the changes introduced in late 2018 and January 2019 continue to affect year-over-year and year-to-date analyses between 2019 and previous years" and "Starting with January 2019 data, Statistics Canada updated the method of determining trip durations for US residents travelling to Canada and for Canadian residents returning from the United States. This change affects the relative proportions of same-day and overnight travelers arriving in Canada by air and by "other" modes of transportation (train, marine private, pedestrians, other vehicles). Trip durations for travel by automobile and bus are not affected. Caution is therefore advised when comparing 2019 data with data from earlier periods for these modes of transportation."

These changes in 2019 by Statistics Canada included survey design differences between the kiosk systems added in the airports versus the paper in-flight form, as well as definitional changes which previously grouped people into day or overnight by categories, which are now able to be more accurate. Because of this, direct historical comparisons are ambiguous and may provide an inaccurate picture of actual trends.

One additional weight, based on Length of Stay data from the Statistics Canada National Travel Survey (NTS), was also added to the standard weighting practice in 2019, and retroactively applied to 2018.