

2024 GLOBAL TRAVELLER RESEARCH PROGRAM

UNITED KINGDOM HIGHLIGHTS REPORT



Canada



Cape Breton Island Nova Scotia



CANADIAN TOURISM DATA
collective

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STUDY OVERVIEW: UNITED KINGDOM MARKET



The Global Traveller Research Program is an annual survey commissioned by Destination Canada and conducted by YouGov Canada. The study fielded online in English, with sample being sourced from a nationally established panel.

The target population are residents aged 18 years and older who have taken a long-haul pleasure trip, where they had stayed at least 4 nights with a minimum of 1 night in paid accommodations in the past 3 years, or plan to take such a trip in the next 2 years.

Highly Engaged Guest (HEG) Audience Definition: Four segments that have been identified by Destination Canada as having higher economic and responsible values that most benefit Canadian communities.



Timing of Fieldwork

**November 18th –
December 4th 2024**



Geographical Definition for Qualified Trips

**Outside of: Europe,
North Africa and the
Mediterranean**



Sample Distribution

Sample distribution:	National
Highly Engaged Guest (HEG) Audience:	1039
Other travellers:	477
Total sample size:	1516

- In 2023, DC switched research providers to YouGov Canada, with the project being migrated over to YouGov’s proprietary panel.



Key Insights



Canada continues to be a leading international destination among UK travellers, with next 2-year immediate potential for Canada being 3.7M



Potential visitors to Canada are more likely to consider a visit during the Summer months followed by Fall



Travellers are interested in local cuisine and natural attractions



Travellers to Canada in the past 3 years were mostly on holiday trips, choosing Canada for factors such as it being somewhere they always wanted to visit, safety, and seeing a great trip itinerary



There is a high level of interest in Indigenous culture among UK Travellers; safety and comfort of the destination, as well as authentic experiences would increase their interest in Indigenous cultural experiences

MARKET SIZING



Killarney Provincial Park
Ontario

MARKET SIZING – LONG-HAUL TRAVELLERS

Total Population 18+

52,156,500 (Total UK Population 18+)

22% Took a Long-Haul[^] Pleasure Trip in the Past 3 Years

11,474,500 (Recent Long-Haul Travellers)

22% Plan To Take a Long-Haul Pleasure Trip In Next 2 Years

11,474,500 (Upcoming Long-Haul Travellers)

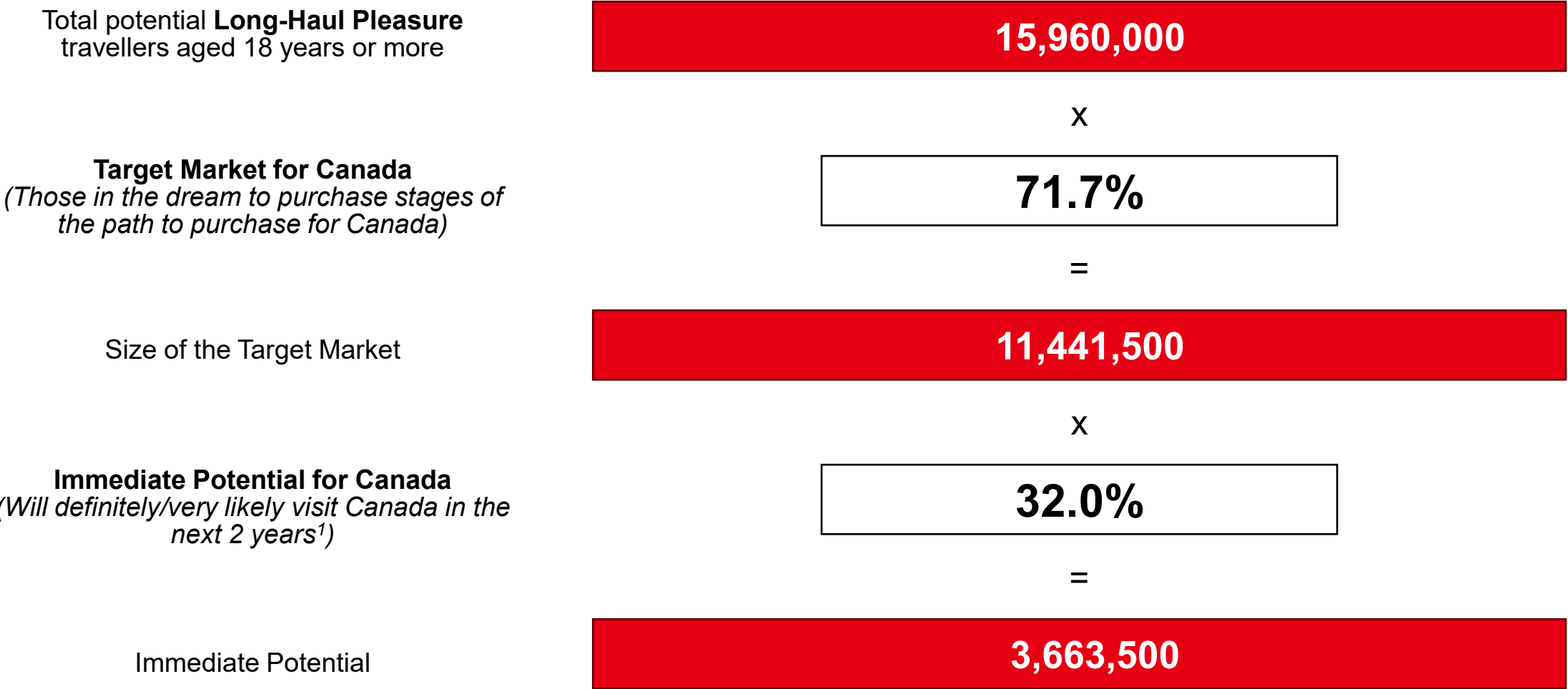
30.6% Incidence Rate

Total long-haul pleasure travel incidence (past 3 years/planned next 2 years)

15,960,000 (Total Long-haul Travellers)

[^] Long-haul = outside of Europe, North Africa and the Mediterranean
Note: Results are from 2023 YouGov Canada Omnibus Survey
Base: General population aged 18+ (n=2244)

POTENTIAL MARKET SIZE FOR CANADA (NEXT 2 YEARS)



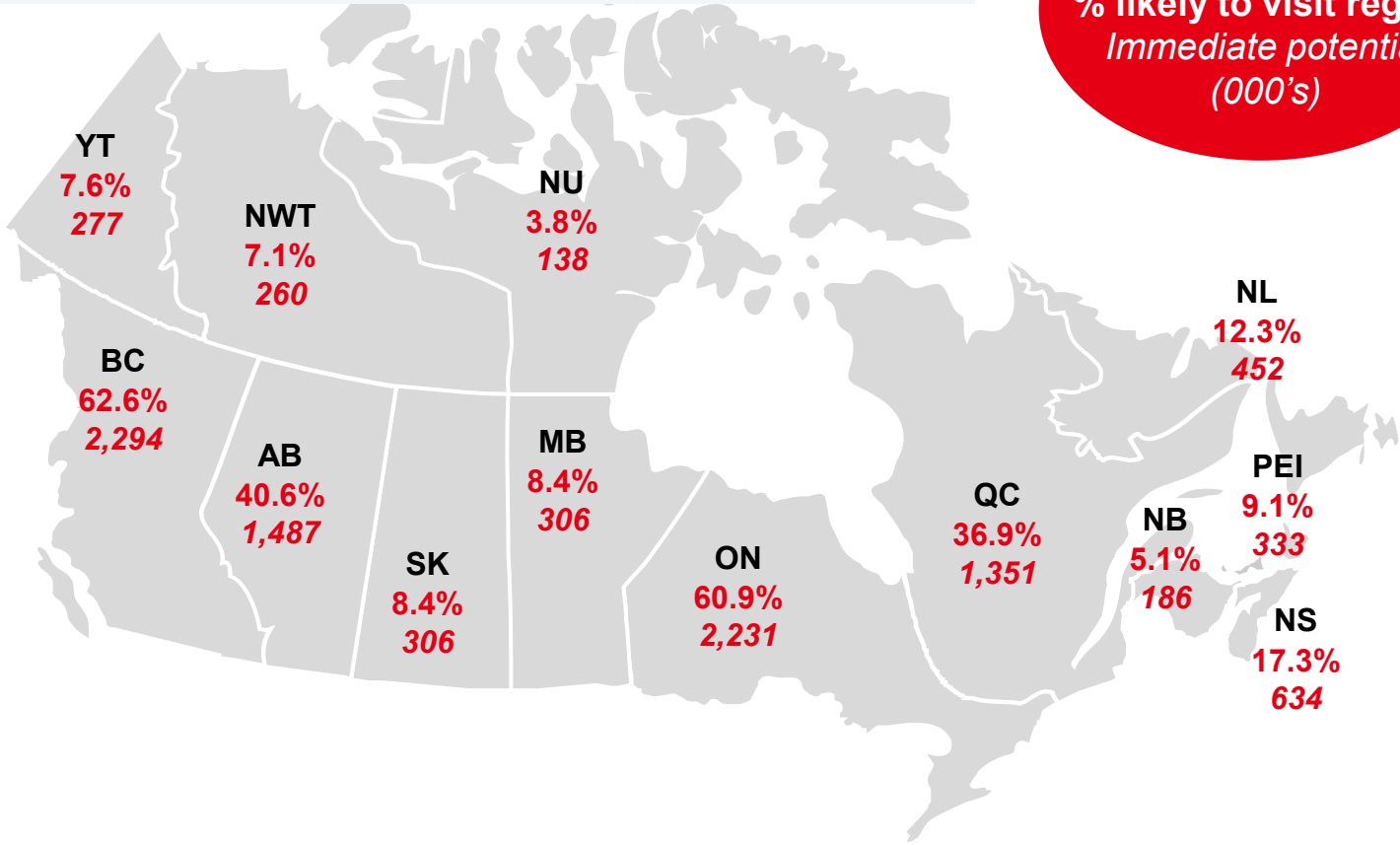
¹ Includes respondents likely to visit Canada for a trip of 1 to 3 nights, or a trip of 4 nights or more.
Base: Target market for Canada = long-haul pleasure travellers (past 3 years or next 2 years) (n=1516); Immediate potential for Canada = dream to purchase stages for P2P for Canada (n=1088)
C1. Which of the following best describes your current situation when thinking about each of the following destinations for a holiday trip? (Select one for each)
E1. Realistically, how likely are you to take a holiday trip to Canada in the next 2 years? (Select one)

POTENTIAL MARKET SIZE BY REGION

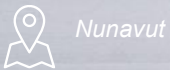
Ontario and BC have the potential to draw in over 2.2 million UK travellers each over the next 2 years.

Immediate Potential for Canada: **3,663,500**

Key:
% likely to visit region
Immediate potential
(000's)



Base: Those in the dream to purchase stages of the path to purchase for Canada and definitely/very likely to take a trip to Canada (n=1088)
E2. If you were to take a holiday trip to Canada, in the next 2 years, which of the following Canadian provinces or territories are you likely to visit? (Select all that apply)



TIME OF YEAR INTERESTED IN TAKING A TRIP TO CANADA (NEXT 2 YEARS)

Province/Territory	Winter (Dec, Jan, Feb)	Spring (Mar, Apr, May)	Summer (Jun, Jul, Aug)	Fall (Sept, Oct, Nov)
British Columbia	7%	18%	27%	23%
Alberta	4%	13%	17%	13%
Saskatchewan	1%	2%	4%	2%
Manitoba	2%	2%	3%	2%
Ontario	5%	17%	26%	20%
Quebec	4%	11%	16%	13%
New Brunswick	1%	2%	2%	2%
Nova Scotia	2%	5%	6%	6%
Prince Edward Island	1%	2%	3%	3%
Newfoundland & Labrador	2%	3%	5%	5%
Yukon	1%	2%	3%	2%
Northwest Territories	1%	2%	3%	2%
Nunavut	1%	1%	1%	1%

Base: Those in the dream to purchase stages of the path to purchase for Canada & definitely/likely to take a trip to Canada (n=1088) E3a-m. During what time of year are you considering visiting [PROVINCE]? (Select all that apply)



UK travellers show a preference for summer, while fall is the second most popular time of year.

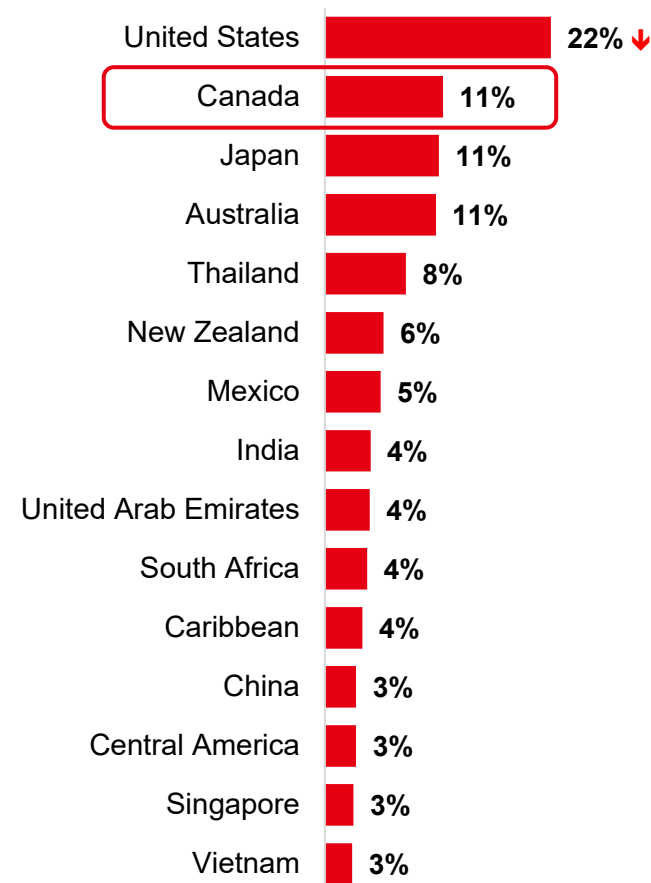
CANADA VS. COMPETITORS



Alberta

UNAIDED DESTINATION CONSIDERATION (NEXT 2 YEARS)¹

On an unaided basis, UK travellers are most likely to consider the United States, followed by Canada, Japan and Australia.



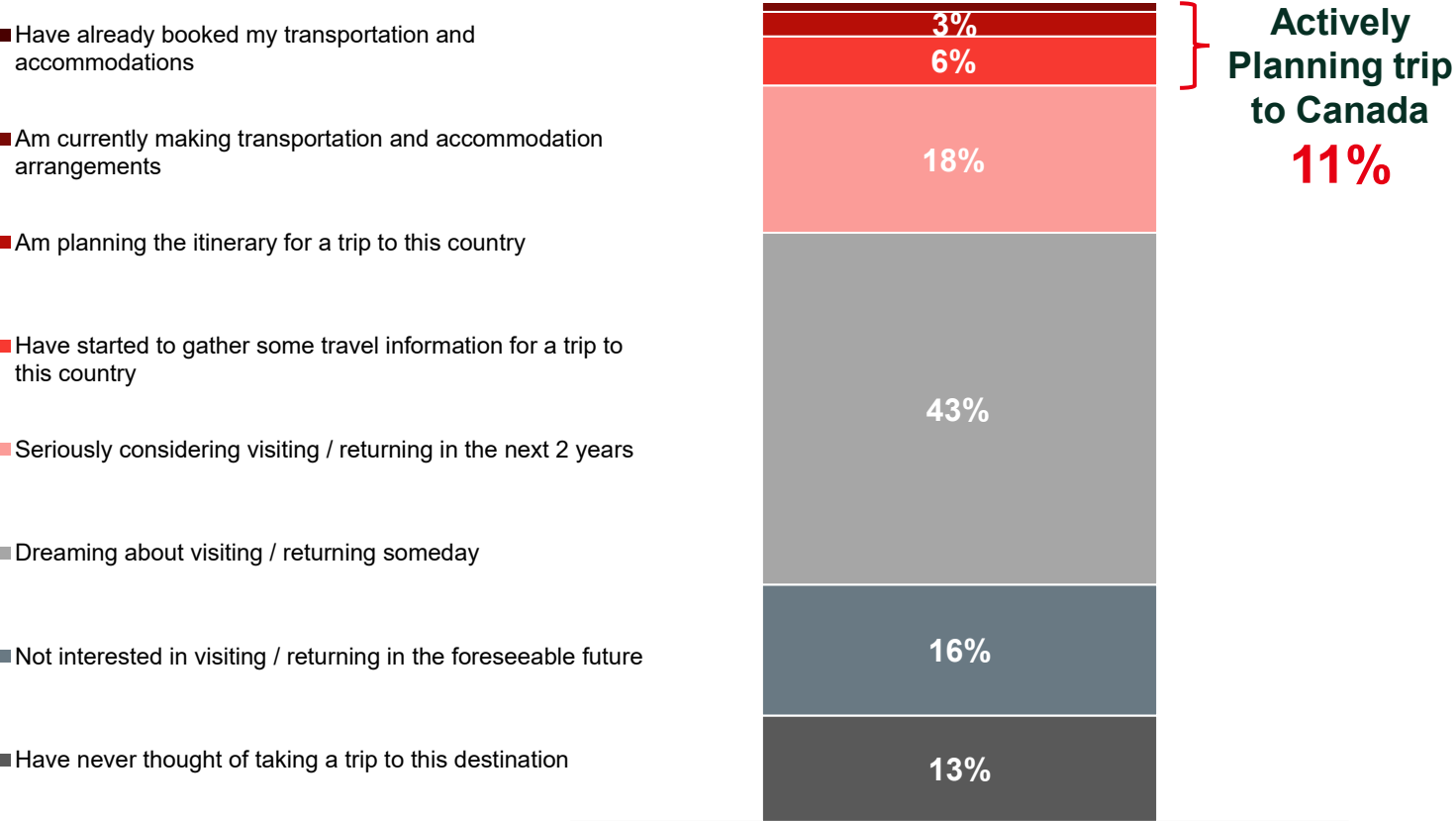
¹Roll-up of brand mentions by country (e.g., percentage who said "Canada" or any destination in Canada).
Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=1516)
B1. You mentioned that you are likely to take long-haul holiday trip in the next 2 years. Which destinations are you seriously considering? (Please list up to 3 destinations)



Tofino

British Columbia

STAGE IN THE PURCHASE CYCLE FOR CANADA



One in ten UK travellers are actively planning a trip to Canada.

12 ↑ / ↓ = significantly higher/lower result (2024 vs. 2023)

Note: all respondents evaluated Canada plus 3 randomly selected countries from the competitive set.
Base: Long-haul pleasure travellers (past 3 years or next 2 years), Evaluated Canada (n=1516)
C1. Which of the following best describes your current situation when thinking about each of the following destinations for a holiday trip?
(Select one for each)

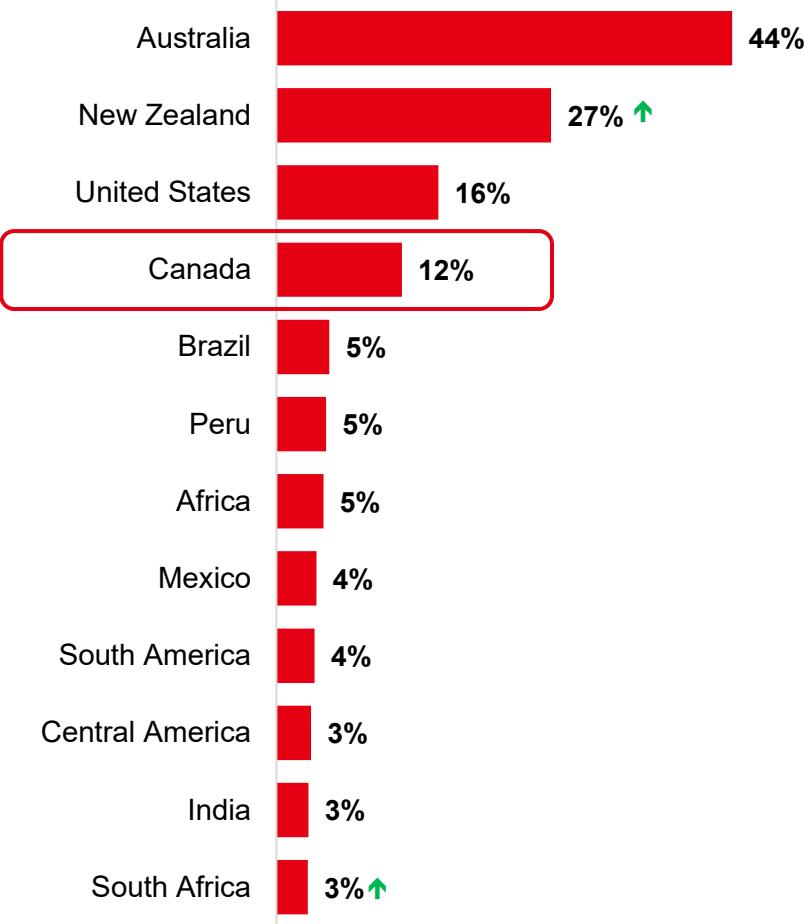


INDIGENOUS TRAVEL



Carcross
Yukon

UNAIDED INDIGENOUS DESTINATION



↑ / ↓ = significantly higher/lower result (2024 vs. 2023)

Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=1516)
B4. [DESCRIPTION] What destinations come to mind when thinking about **Indigenous tourism**? (Please list up to 3 destinations. You can mention destinations within or outside of Europe, North Africa and the Mediterranean.)
[DESCRIPTION] Please note: You do not have to limit your responses to destinations you are considering for a holiday trip.



On an unaided basis, Canada ranks fourth when thinking of Indigenous tourism destinations.

INTEREST IN INDIGENOUS DESTINATIONS

One half of UK travellers are interested in participating in Indigenous experiences in Canada, with nearly three in ten being very interested.

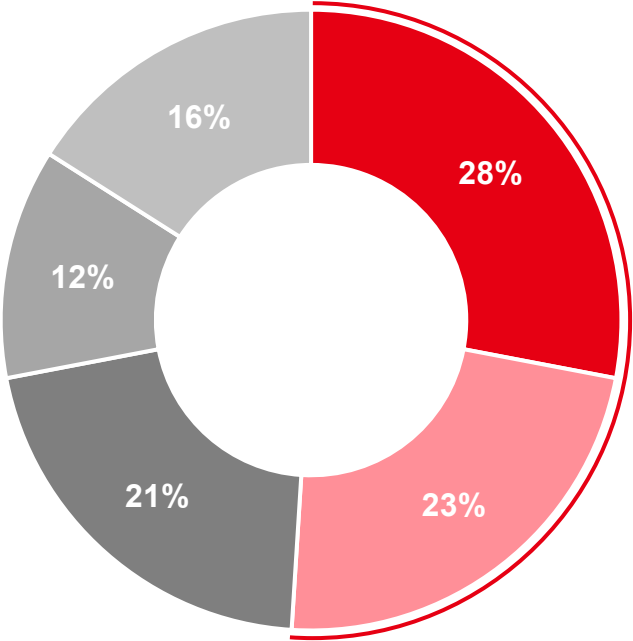
5 - Very interested

4

3

2

1 - Not at all interested



4 or 5 (out of 5)
51%

Note: respondents were asked either about interest in Indigenous destinations (C10) or factors to drive interest in Indigenous cultural experiences (C11)
 Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=749)
 C10. As you may or may not know, Indigenous peoples are descendants of the original inhabitants of a country or region before people of different cultures or origins arrived. They have unique traditions and ways of life that are often distinct from the larger societies where they live. Indigenous tourism businesses are owned or operated by Indigenous people. How interested are you in participating in Indigenous cultural experiences and tourism activities in the following destinations?

FACTORS TO DRIVE INTEREST IN INDIGENOUS CULTURAL EXPERIENCES

Safety and comfort of the destination, followed by authenticity of the experience are the most mentioned factors driving interest in Indigenous cultural experiences.



Note: respondents were asked either about interest in Indigenous destinations (C10) or factors to drive interest in Indigenous cultural experiences (C11)
Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=767)
C11. What factors would increase your interest in participating in Indigenous cultural experiences and tourism activities in a destination? (Select up to 3)



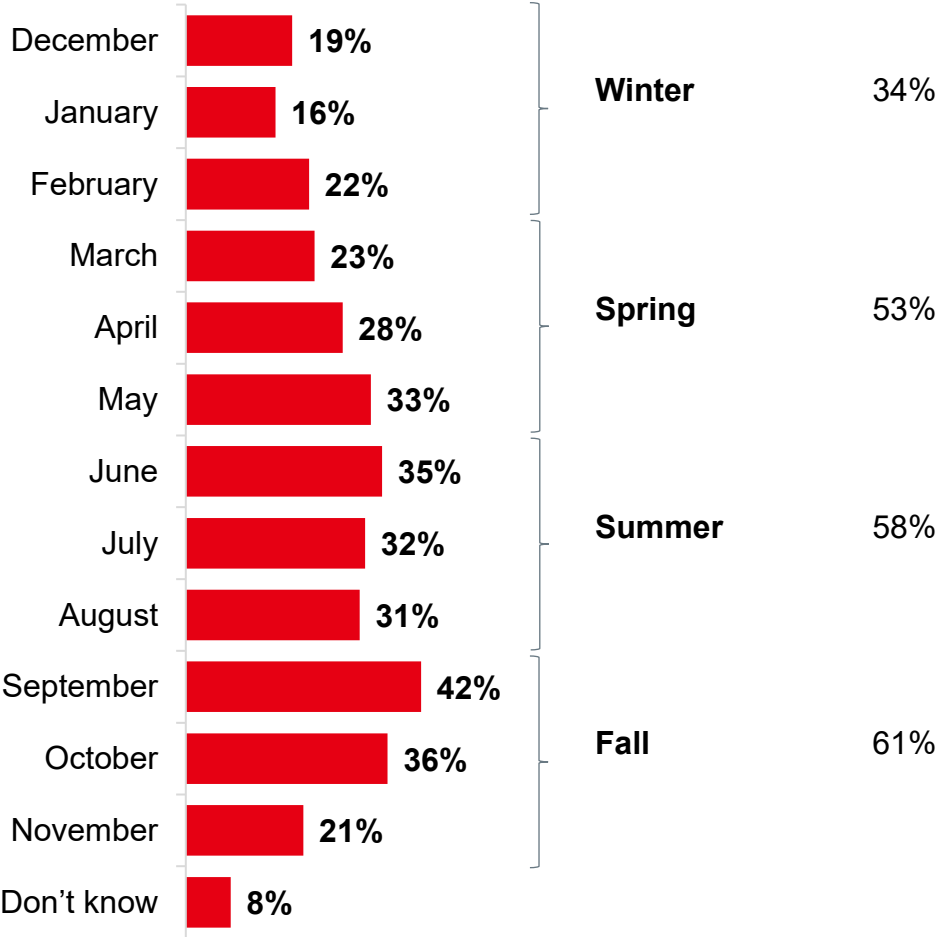
TRAVEL BEHAVIOURS

FARINE
FIVE ROSES



Montreal
Quebec

PREFERRED TIME OF YEAR FOR HOLIDAY TRIPS



Fall is the most preferred time for holiday trips, followed closely by summer, with September being the most popular month among UK travellers.



Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=1516)
D1. In general, what time of year do you typically like to take holiday trips? Select all that apply




Gros Morne National Park
Newfoundland and Labrador

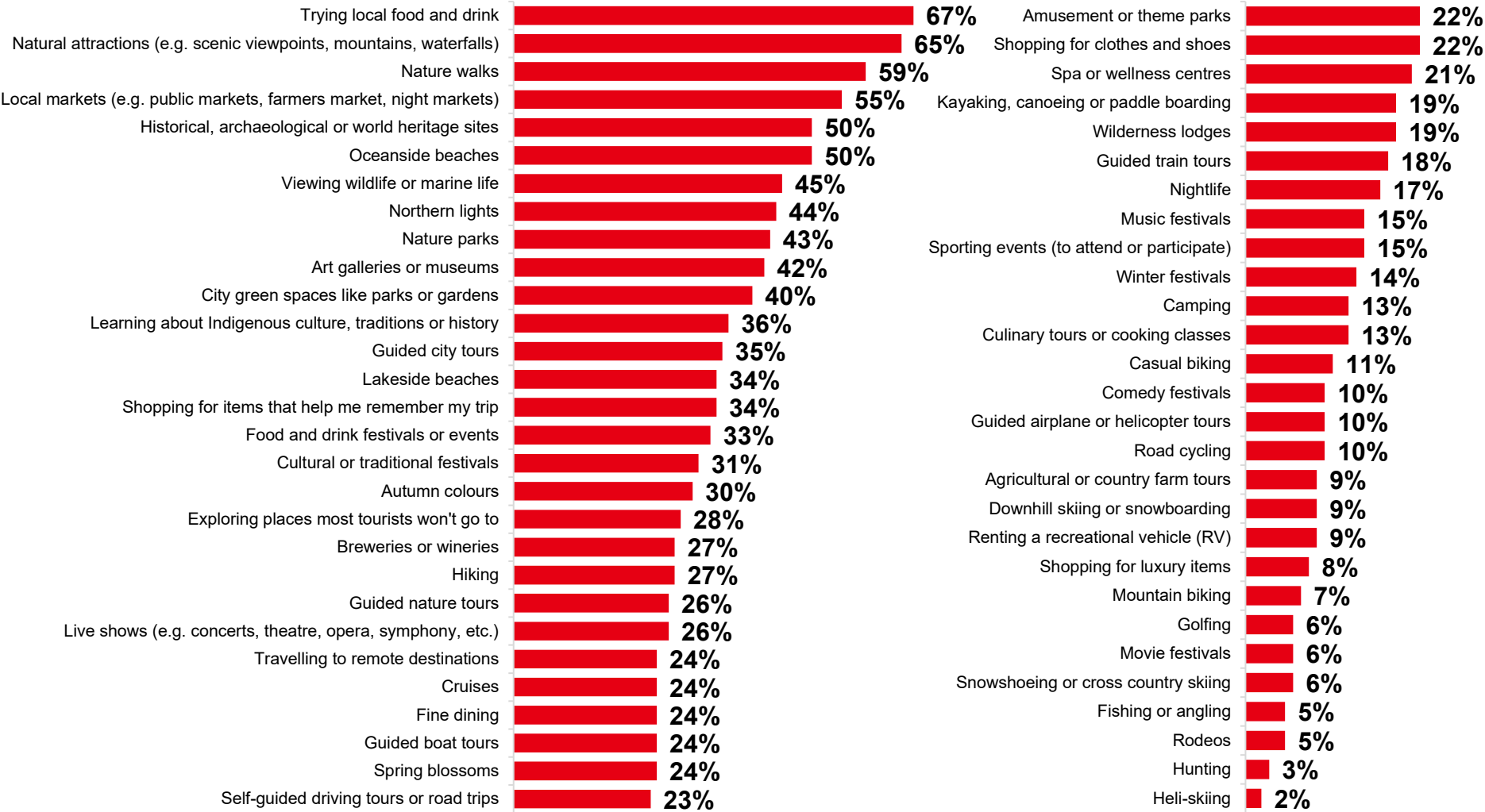
United Kingdom GTRP –
December 2024



GENERAL ACTIVITIES INTERESTED IN (FULL LIST)

Top activities when on a holiday include trying local cuisine, and natural attractions.

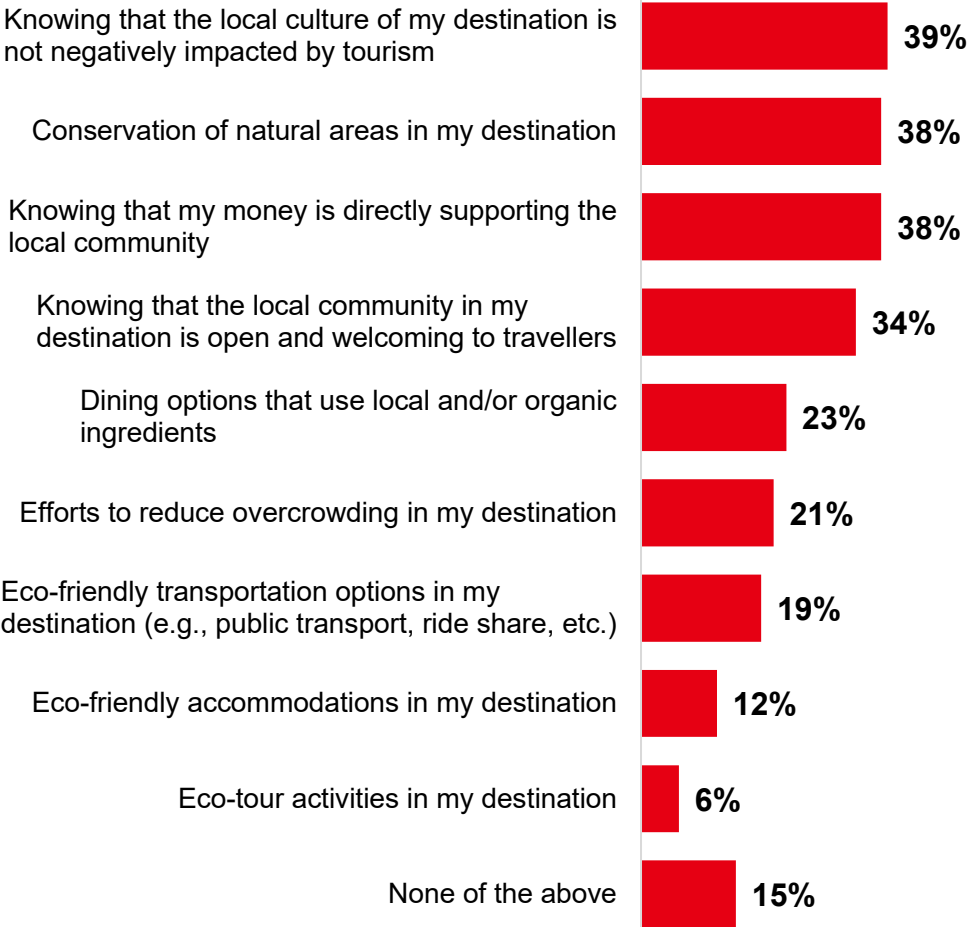
 Cup and Saucer Trail
Ontario



Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=1516)
D4. In general, what activities or places are you interested in while on holiday? (Select all that apply)

TOP 3 MOST IMPORTANT SUSTAINABILITY EFFORTS

The most important sustainability efforts are knowing that the local culture of the destination are not negatively impacted by tourism, conservation of natural areas in the destination, and knowing that their money is supporting the local community.

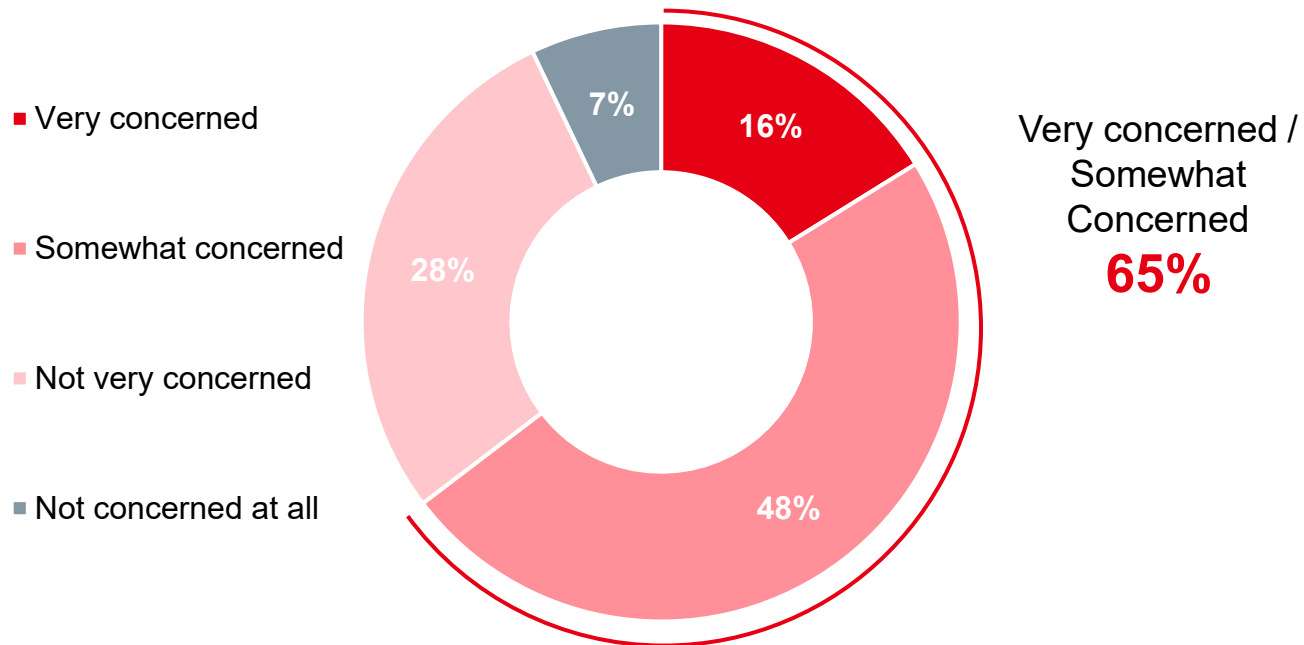


Sustainable Travel Description

Sustainable travel refers to “travel that minimizes any negative impacts on the destination’s environment, economy and society, while making positive contributions to the local people and conserving the destination’s natural and cultural heritage”.

Note: respondents were asked either about most important sustainability efforts (D8) or barriers to sustainable travel (D9)
Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=755)
D8. What are the top 3 sustainability efforts that are most important to you when selecting a holiday destination? Select up to three choices.

IMPACT OF EXTREME WEATHER EVENTS ON TRAVEL PLANS



47% state extreme weather events will **significantly or moderately impact** their travel decisions in the next year

↑ / ↓ = significantly higher/lower result (2024 vs. 2023)

Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=1516)

D10. As you may or may not be aware, extreme weather events are occurrences of unusually severe weather or climate conditions. They are often short-lived and include blizzards, heat waves, wildfires, tornadoes, hurricanes or tropical cyclones. How concerned are you about extreme weather events affecting your travel plans?

D15. To what extent do you expect extreme weather events to impact your future travel decisions in the next year?

Nearly two thirds of UK travellers are concerned about extreme weather impacting their travel plans, with almost one half stating that extreme weather will impact their future travel decisions.



Canadian Museum of Human Rights, Winnipeg
Manitoba

United Kingdom GTRP –
December 2024

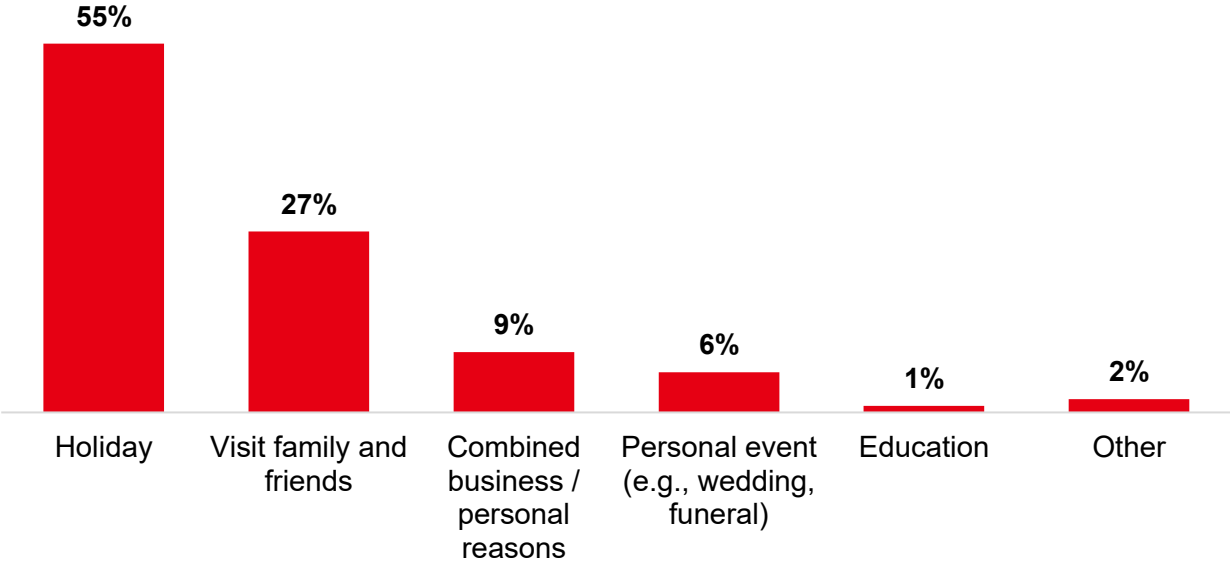


MOST RECENT TRIP



Le Pays de la Sagouine
New Brunswick

MAIN PURPOSE OF RECENT TRIP



Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to Canada past 3 years (n=172)
F2. What was the main purpose of this trip? (Select one)

Over one half of UK travellers to Canada in the past three years were going on a holiday trip.

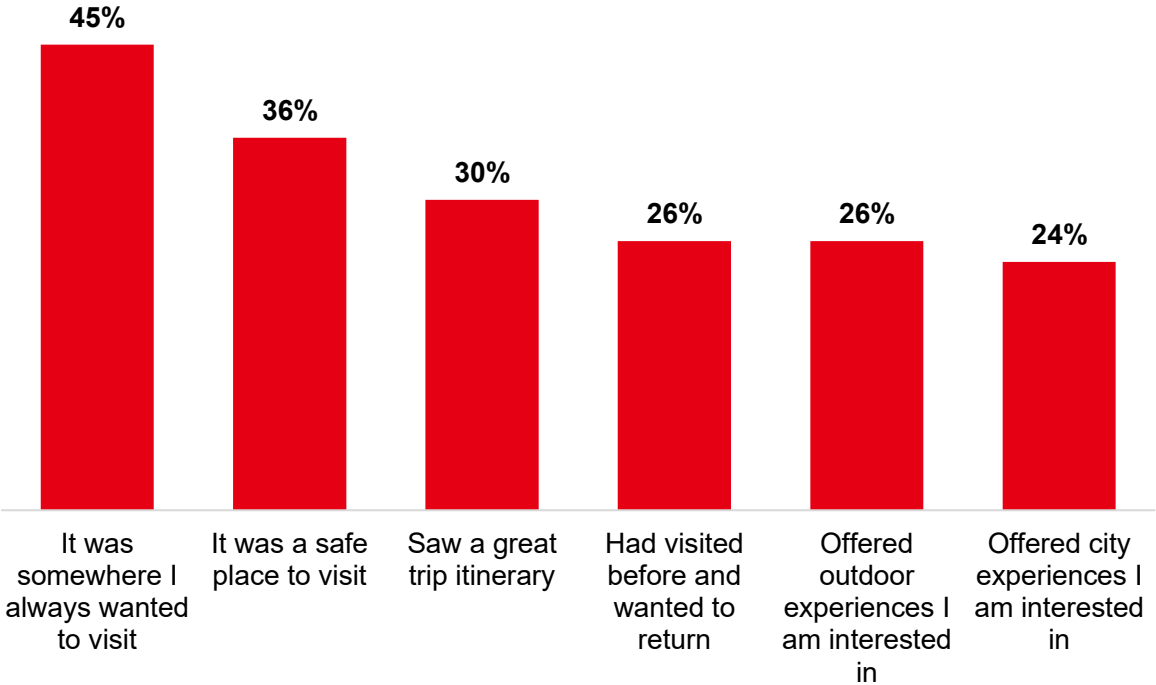


Nahanni National Park Reserves
Northwest Territories

United Kingdom GTRP –
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FACTORS IN CHOOSING DESTINATION FOR RECENT TRIP (TOP 6)

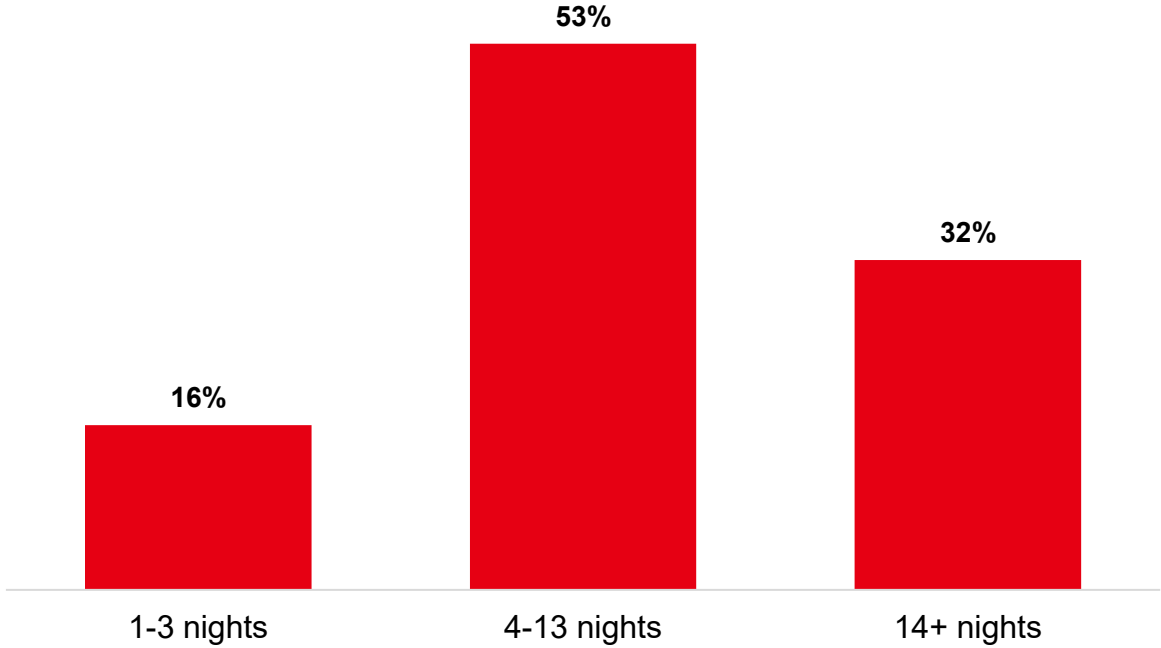


The top factors for choosing Canada for their most recent trip include that it was somewhere they always wanted to visit, safety, and seeing a great trip itinerary.

Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to any destination past 3 years, Took a holiday (n=94)
F3. Which of the following factored into your choice of destination for this trip? (Select all that apply)



NIGHTS SPENT DURING RECENT TRIP



Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to Canada past 3 years (n=172)
 F4. How many nights did you spend in this destination?



Over one half of UK travellers to Canada stayed for 4-13 nights.

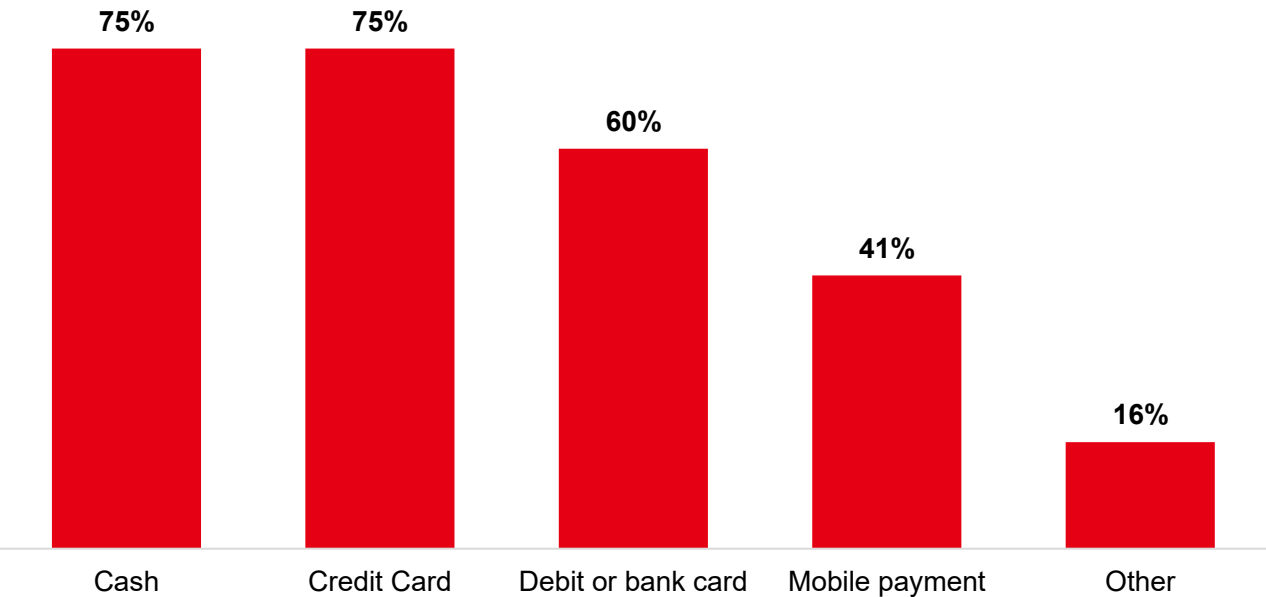


Barren Canyon, Algonquin Park
 Ontario

United Kingdom GTRP –
 December 2024



PAYMENT METHODS FOR RECENT TRIP



Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to Canada past 3 years (n=172)
F8. Approximately what percentage of your purchases did you make during your trip with each of the following payment methods? Your best guess is fine. (Enter one number per row. Your total must add to 100%).

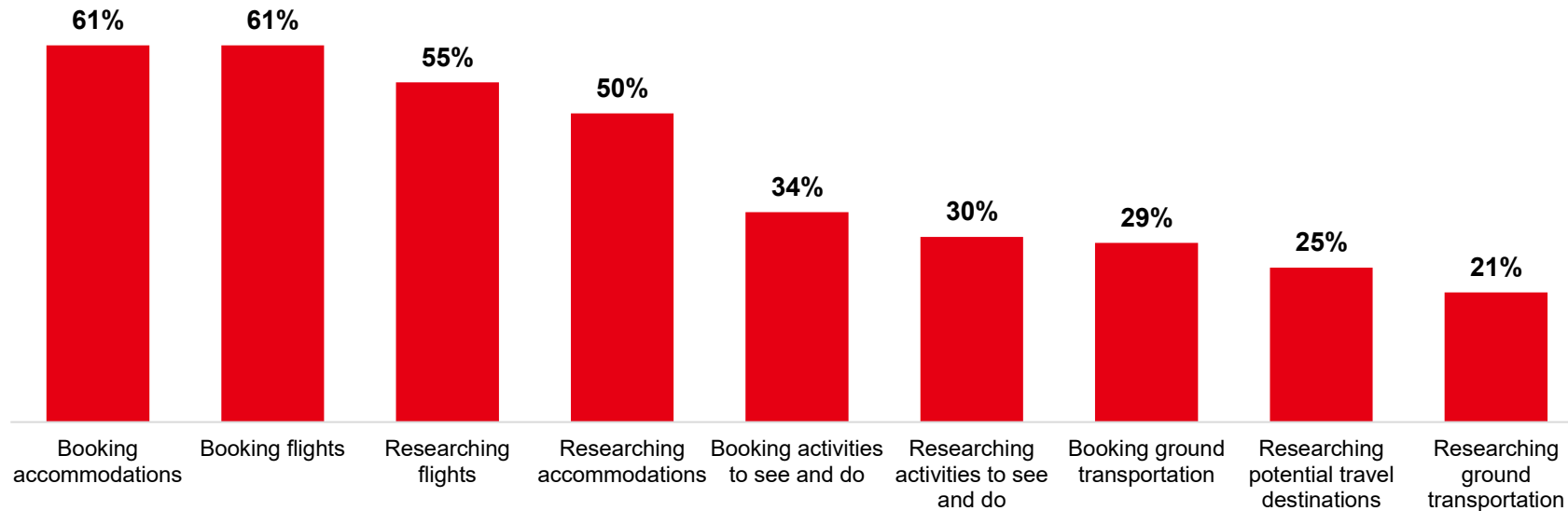


The most common payment methods UK travellers used for their most recent trip to Canada were cash or credit card.



TRAVEL AGENTS/TOUR OPERATOR USAGE FOR RECENT TRIP (AMONG THOSE WHO USED A TRAVEL AGENT/TOUR OPERATOR)

33% used a travel agent



**One third of UK
travellers to Canada
used a travel agent,
most likely for
booking
accommodations or
flights.**

Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to any destination past 3 years (n=172) Travelled to any destination past 3 years, Used a Travel Agent/Tour Operator (n=56)

F9. Travel agents offer personalized service to help individuals, groups, and business travellers plan and organize their travel schedules, from purchasing tour packages to booking flights and hotels. Examples of travel agents include Trailfinders or Flight Centre, they do not include online booking engines like Expedia or Booking.com. Did you use a travel agent or tour operator to help you research or book your trip? (Select one)

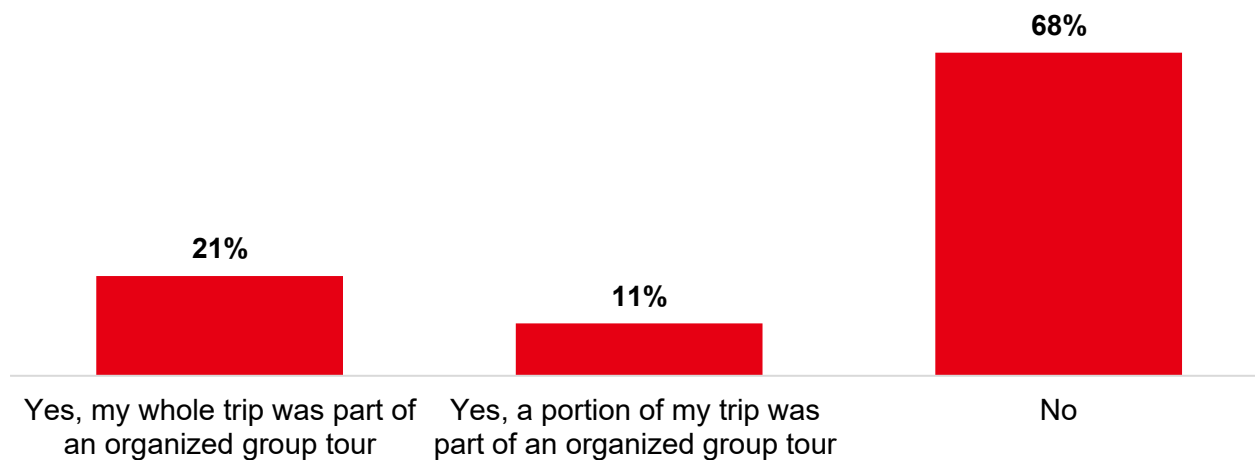
F10. Which of the following did a travel agent or tour operator help you with?

United Kingdom GTRP –
December 2024

Twin Falls Lodge
Saskatchewan



ORGANIZED GROUP TOUR FOR RECENT TRIP



Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to Canada past 3 years (n=172)
F11. An organized group tour consists of a package where any combination of accommodation, transportation, food and/or activities are included as a multi-day itinerary. Did you travel as a part of an organized group tour on this trip?

Over two in ten travellers to Canada in the past three years used an organized group tour for their whole trip, and another one in ten used one for a portion of their trip.



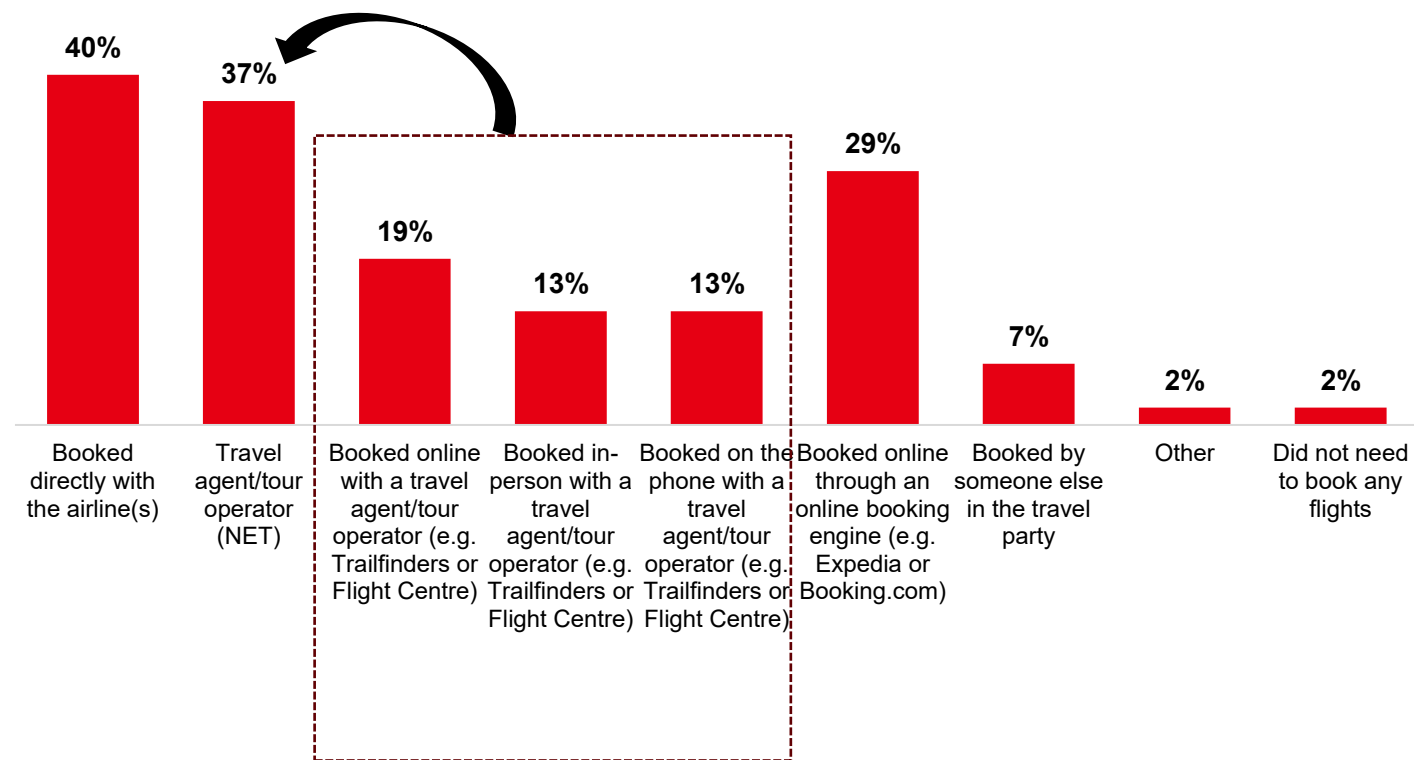
Saskatoon

Saskatchewan

United Kingdom GTRP –
December 2024



BOOKING FLIGHTS FOR RECENT TRIP



Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to Canada past 3 years (n=172)
F12. How did you book your flight for this trip? (Select all that apply)

Recent UK travellers to Canada were most likely to have booked flights directly with the airlines, followed by booking with a travel agent or tour operator.

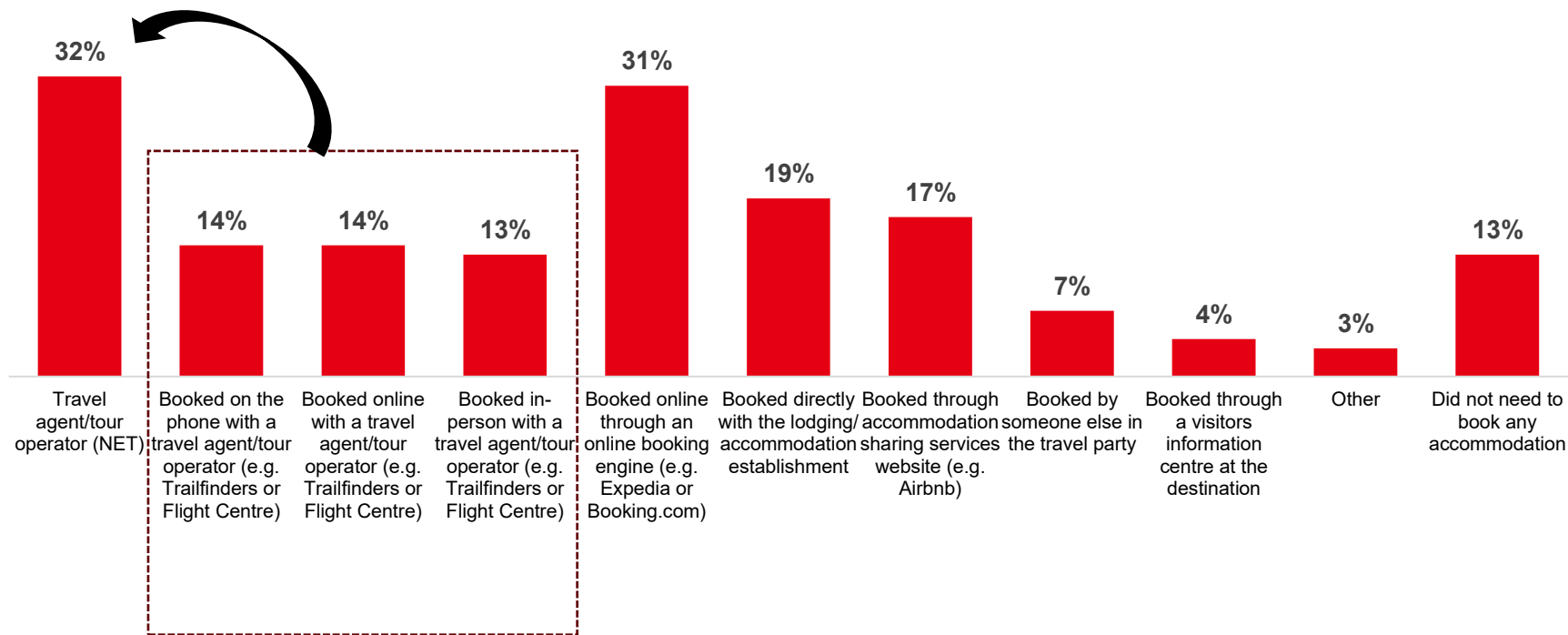


Montmorency Falls Park, Quebec City
Quebec

United Kingdom GTRP –
December 2024



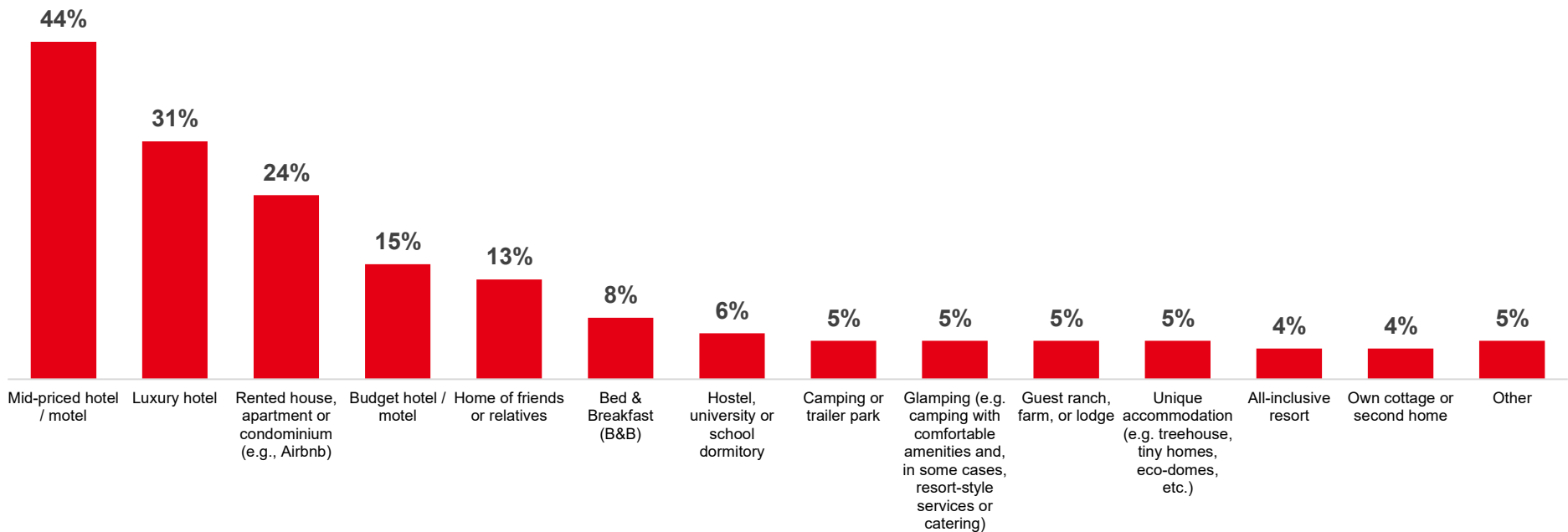
BOOKING ACCOMMODATIONS FOR RECENT TRIP



Over three in ten recent travellers to Canada booked their accommodations through a travel agent or tour operator or through an online booking engine.

Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to Canada past 3 years (n=172)
F13. How did you book your accommodation for this trip? (Select all that apply)

TYPE OF ACCOMMODATIONS FOR RECENT TRIP



Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to Canada past 3 years, Booked Accommodations (n=149)
F14. Which type of accommodation did you stay in during this trip? (Select all that apply)



UK travellers that recently travelled to Canada were most likely to stay at a mid-priced hotel or motel.



THANK YOU

For any questions, please reach out to research@destinationcanada.com

