

# 2024 GLOBAL TRAVELLER RESEARCH PROGRAM

## UNITED KINGDOM STRATEGIC 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	Geographical Definition for Qualified Trips	Sample Distribution
November 18 <sup>th</sup> – December 4 <sup>th</sup> 2024	Outside of: Europe, North Africa and the Mediterranean	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.



# SEGMENT DESCRIPTION SLIDES

Destination Canada categorizes travellers into seven key segments using a short series of questions called the **Traveller Segmentation Program typing tool**. Four segments have been identified by Destination Canada as having higher economic and responsible values that most benefit Canadian communities – these segments are referred to as Highly Engaged Guests and are Destination Canada’s recommendation for all international leisure tourism targeting towards Canada. Throughout this report audience breakouts are included sometimes for Highly Engaged Guests (HEGs) as a whole and for individual segments that make up Highly Engaged Guests.

## HIGHLY ENGAGED GUESTS



**Outdoor Explorers**  
Base motivations

Adventure  
Novel & Authentic  
Accomplishment



**Culture Seekers**  
Base motivations

New Connections  
Novel & Authentic  
Familiarity



**Refined Globetrotters**  
Base motivations

Novel & Authentic  
Bonding  
Security



**Purpose Driven Families**  
Base motivations

Bonding  
Novel & Authentic  
Security

## OTHER TRAVELLER SEGMENTS



**City Trippers**  
Base motivations

Fun  
Escape & Relax  
Bonding



**Simplicity Lovers**  
Base motivations

Escape & Relax  
Security  
Simplicity



**Fun & Sun Families**  
Base motivations

Bonding  
Escape & Relax  
Fun

**To Learn More**  
If you'd like to learn more about Destination Canada's segments, and their motivations, explore detailed market profiles, training options, and segment identification tools at [TourismDataCollective.ca/Segmentation](https://TourismDataCollective.ca/Segmentation)



# KEY INSIGHTS



Lunenburg  
Nova Scotia





## Canada's Market Potential & Competitive Destinations

- The immediate market potential for Canada is 3.7M UK Travellers
- The four HEG segments represent over seven in ten (77%) of the immediate market potential:
  - ✓ **Refined Globetrotters** are the largest segment and represent 904K UK Travellers
  - ✓ **Outdoor Explorers** are the second largest segment and represent 817K UK Travellers
  - ✓ **Culture Seekers** are the third largest segment and represent 766K UK Travellers
  - ✓ At 336K, **Purpose Driven Families** represent the smallest segment despite having the highest *incidence* of UK travellers who will definitely/very likely visit Canada in the next two years
- Canada ranks behind the US and Australia for level of knowledge, with only one in four (25%) saying their knowledge of Canada is excellent or very good. This is down compared to last year, but HEGs say they are more familiar with Canada
- UK travellers associate Canada with having beautiful scenery and landscapes and having great outdoor/physical activities
- Canada is second only to the US when looking at seriously considering a trip on an unaided and aided basis among total UK travellers, but falls behind Japan for aided consideration and actively planning among HEG travellers. The biggest challenge for Canada is in converting those in the dream to purchase stage further down the funnel to actual visitation
- In addition, cost is the main factor that would discourage UK travellers from travelling to Canada

## Key Drivers & Opportunities by Priority Segment



### Outdoor Explorers

- In terms of NPS, **Outdoor Explorers** score Canada the second highest (+27)
- Among **Outdoor Explorers**, Canada is well known for being a *safe place to visit, a great place for holidays that avoid surprises, and a socially responsible travel destination*
- Top drivers of holiday destination consideration are *being a destination where they can explore new things and places, a place where they can get away from every day life*. Secondary drivers include *being a place I want to visit with friends or family*
- There is an opportunity for Canada to improve perceptions on being a *place to visit with friends* as no one destination currently owns this dimension of importance



### Refined Globetrotters

- In terms of NPS, **Refined Globetrotters** score Canada the highest (+31) among the four HEG segments
- When it comes to **Refined Globetrotters**, Canada delivers on being a *safe place to visit* (a secondary driver), as well as being known for being a *great place for holidays that avoid surprises and being a socially responsible destination*
- Top drivers of holiday destination consideration are *being a place I want to visit family*. Secondary drivers include *being a place I want to visit with friends, is a safe place to visit, and has unique, natural wonders to discover*
- There is also an opportunity for Canada to improve perceptions on being a *place to visit with family* as no one destination currently owns this dimension of importance



## Fall Travel

- Seasonal potential continues to be higher in the Fall (5.3M Total), more than double the Winter (2.5M)
- Barriers for Fall travel to Canada include not being able to take a holiday during these months (18%) and the weather not being ideal (18%), although mentions of weather have decreased compared to last year
- On the other hand, top motivators were the ideal weather (38%) and less crowds during these months (35%). Mentions of cheaper travel (33%) have decreased compared to last year. Among the four HEG segments, ideal weather is the key motivator for all, although **Outdoor Explorers** place greater importance on there being less crowds during the Fall months.



## Winter Travel

- Consideration to travel for the Winter is low for Canada among total UK travellers, but is slightly higher among HEGs
- UK travellers are more likely to view Canada as a distinct Winter destination (52%), and this is slightly higher among **Outdoor Explorers** and **Purpose Driven Families**
- When it comes to travelling to Canada during the Winter months, **Outdoor Explorers** are most motivated by specific activities they want to do in Canada during these months (39%), while **Refined Globetrotters** are most motivated by weather (31%)
- The main barrier to travelling to Canada in the Winter is the weather being too cold, and although this has lessened compared to last year, it is the biggest deterrent across all segments.





## Recent Trip to Canada: Profile

- Over one half of UK Travellers who travelled to Canada went for a holiday, on par with last year and similar among HEGs
  - Summer, followed by Fall were the most popular times to visit
- Natural attractions, walks and city green spaces, and trying local food/drink were the top activities for **Outdoor Explorers**, **Refined Globetrotters** and **Culture Seekers**
- For travellers to Canada, usage of travel agents to research flights has increased compared to last year; while using a travel agent or tour operator for booking ground transportation has decreased. As well, stays at luxury hotels have increased, while stays at bed & breakfasts have decreased
- Travelling with a spouse/partner or with children under 18 has decreased, while those travelling with a business associate or colleague during their trip to Canada increased
- Compared to other destinations, trips to Canada differed in the following ways:
  - 27% visited family and friends (vs. 20% for other destinations)
  - Most trips lasted 4-13 nights (53%). Only one-third (32%) stayed for over 14 nights in Canada, compared to 44% for other destinations
  - Usage of travel agents or tour operators for researching flights or accommodations was higher for travellers to Canada
  - Travellers to Canada were more likely to use an organized group tour for their whole trip (21%) compared to only 9% for other destinations
  - Travellers to Canada were more likely to book flights and accommodations (via the phone or in-person) with a travel agent or tour operator

# 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<sup>^</sup> 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)

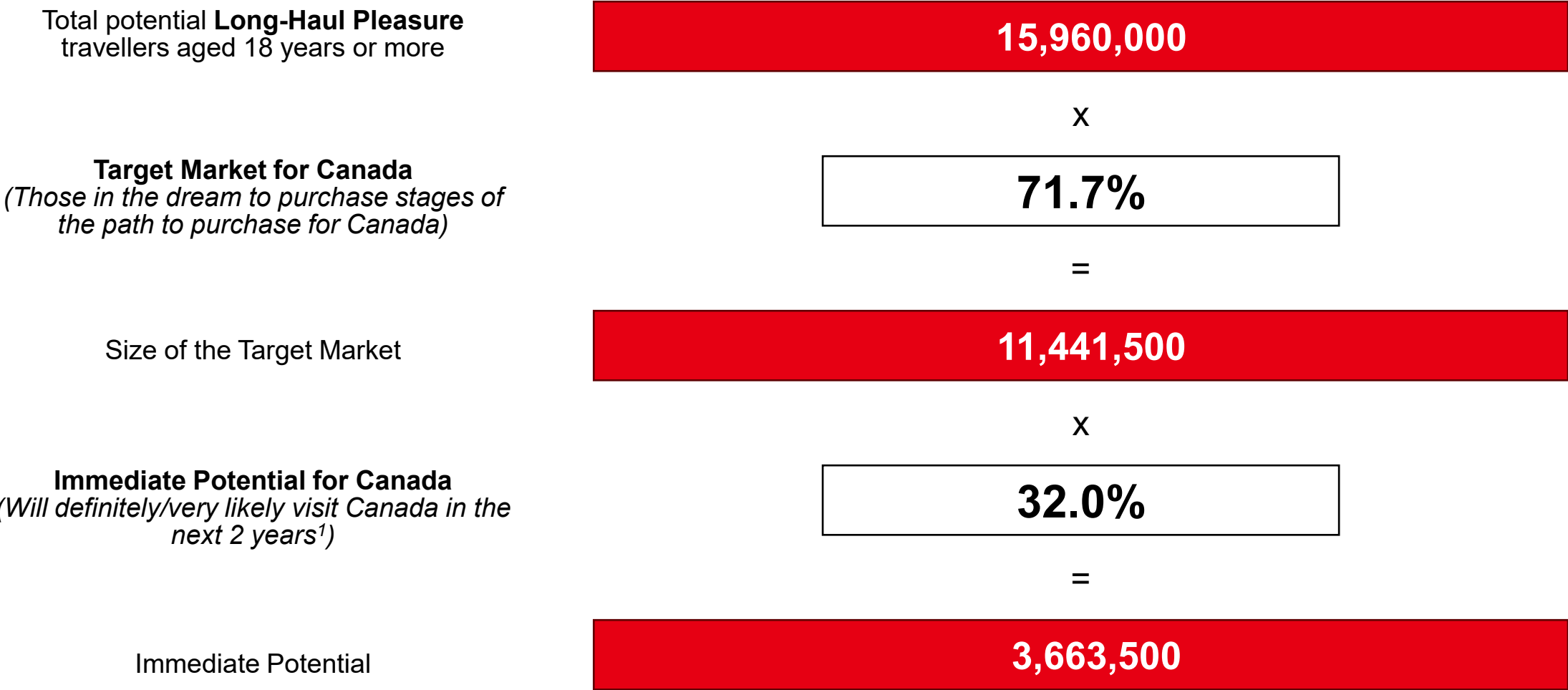
15,960,000 (Total Long-haul Travellers)

<sup>^</sup> 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)

UK's overall target market and immediate potential for Canada have remained stable compared to last year, with 3.7M travellers definitely or very likely to visit Canada in the next two years.



<sup>1</sup> 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 FOR CANADA (NEXT 2 YEARS): BY SEGMENT



Among segments, Refined Globetrotters and Outdoor Explorers offer the largest immediate potential for Canada, with 904K and 817K travellers likely to visit in the next two years, respectively. The Fall season has larger immediate potential across all segments, compared to Winter.

		15,960,000 (Total Long-Haul Travellers)							
Total segment sizes		3,399,500 Outdoor Explorers		2,904,500 Culture Seekers		3,733,000 Refined Globetrotters		901,500 Purpose Driven Families	
X									
Target Market for Canada (Those in the dream to purchase stages of the path to purchase for Canada)		76.1%		72.7%		70.8%		79.1%	
=									
Size of the Target Market		2,586,500		2,112,500		2,642,000		713,000	
X									
Immediate Potential for Canada (Will definitely/very likely visit Canada in the next 2 years <sup>1</sup> )		31.6%		36.3%		34.2%		47.0%	
=									
Immediate Potential		816,500		766,000		903,500		335,500	
X									
Immediate Seasonal Potential (Consideration for Canada in [SEASON] in next 2 years)		Fall 50.1%	Winter 39.7%	Fall 45.2%	Winter 28.7%	Fall 49.1%	Winter 35.8%	Fall 40.7%*	Winter 34.3%*
=									
Immediate Seasonal Potential		Fall 409,000	Winter 324,000	Fall 346,500	Winter 220,000	Fall 443,000	Winter 323,500	Fall 136,500	Winter 115,000

<sup>1</sup> 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): Outdoor Explorers (n=323); Culture Seekers (n=276); Refined Globetrotters (n=354); Purpose Driven Families (n=86)  
Immediate potential for Canada = dream to purchase stages for P2P for Canada: Outdoor Explorers (n=246); Culture Seekers (n=201); Refined Globetrotters (n=251); Purpose Driven Families (n=68)  
Immediate autumn potential for Canada: Outdoor Explorers (n=78); Culture Seekers (n=73); Refined Globetrotters (n=86); Purpose Driven Families (n=32\*); Immediate winter potential for Canada: Outdoor Explorers (n=78); Culture Seekers (n=73); Refined Globetrotters (n=86); Purpose Driven Families (n=32\*)  
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)  
C7. For each of the following destinations, during which months would you consider taking long-haul trip in the next two years?  
\*Small base size, interpret with caution (n<50)

# CANADA VS. COMPETITORS

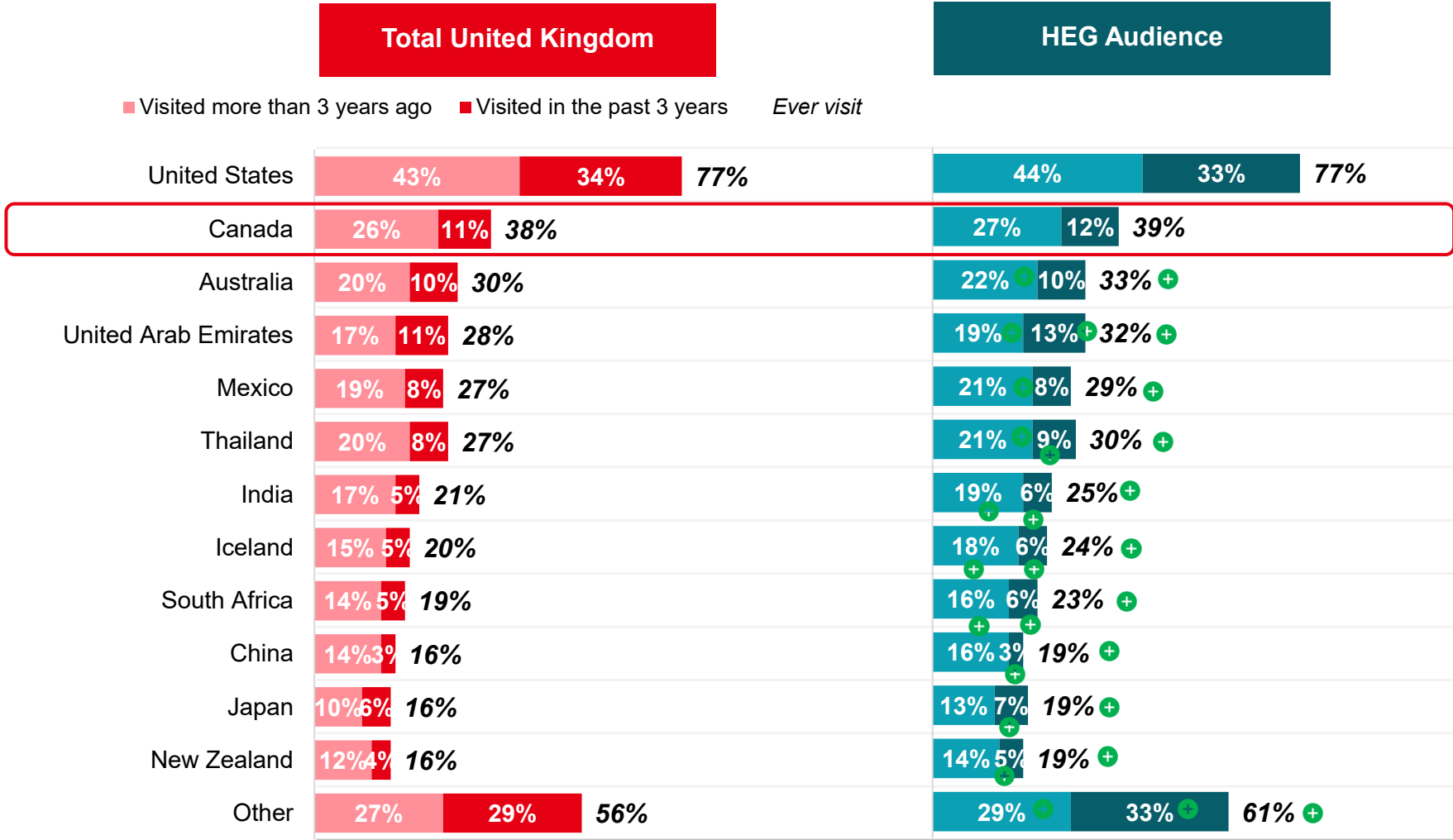


Alberta



# PAST VISITATION

Canada ranks second in past visitation among total UK travellers and among HEGs.



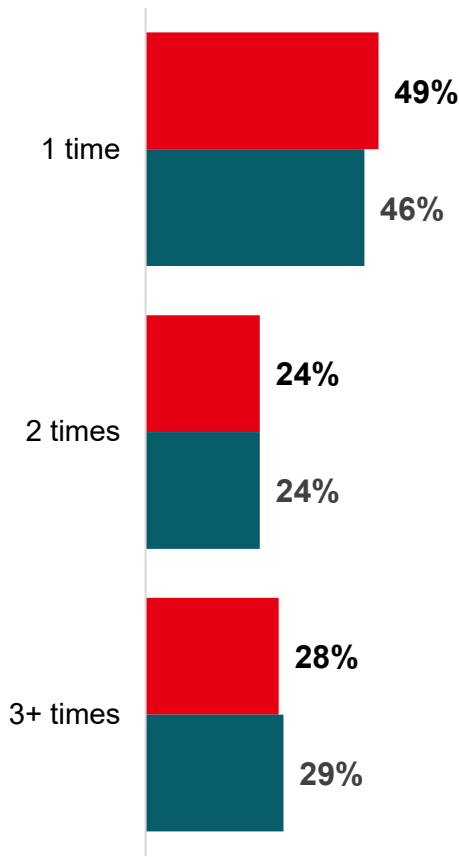
Ever visit Canada:  
Outdoor Explorers: 38%  
Refined Globetrotters: 37%

Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=1516); HEG (n=1039)  
B5. Which of the following countries or regions have you visited while on a holiday trip outside of Europe, North Africa and the Mediterranean which was 1 or more nights long?

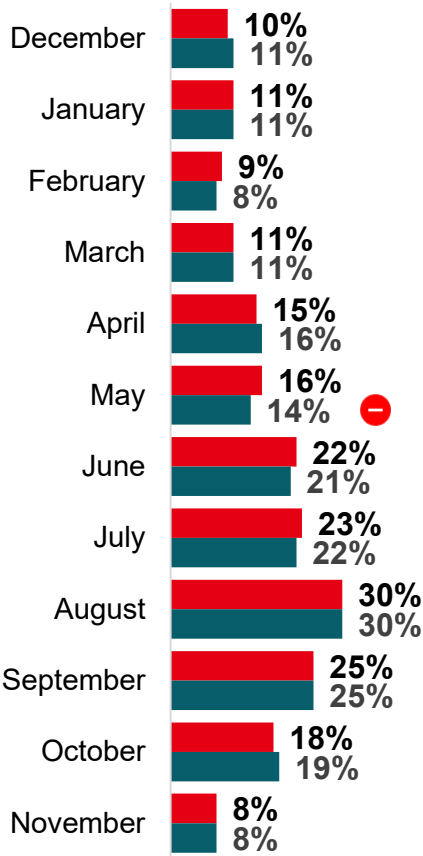
# NUMBER OF VISITS EVER & TIME OF YEAR VISITED CANADA

Summer followed by Fall are the main seasons of travel for total UK travellers and HEGs.

Total United Kingdom HEG Audience



Total United Kingdom HEG Audience

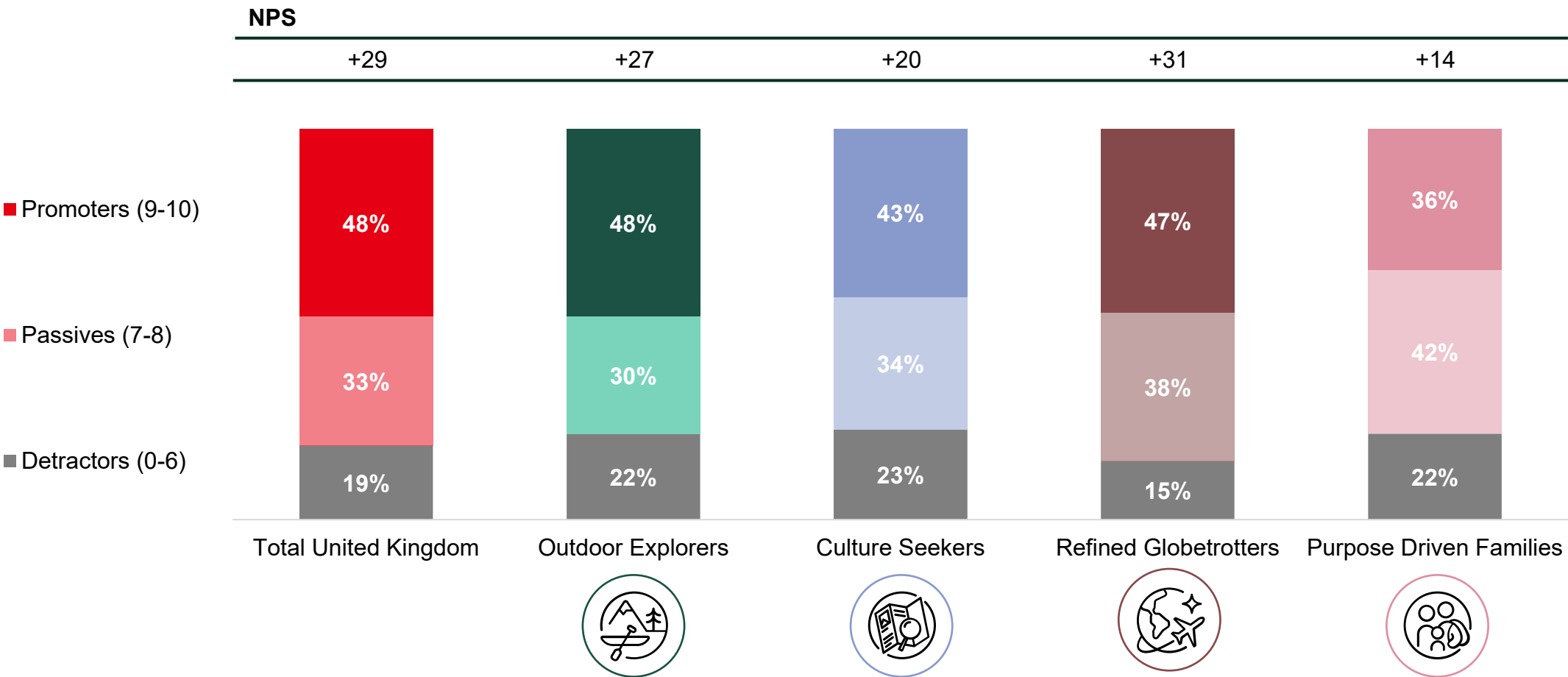


	Total Travellers	Total HEG Travellers
Winter	23%	24%
Spring	32%	32%
Summer	53%	53%
Fall	40%	40%

Base: Long-haul pleasure travellers (past 3 years or next 2 years), Visited Canada (n=569); HEG (n=406)  
F19a. Approximately, how many times have you ever been to Canada?  
F20. What time of year have you ever visited Canada? Select all that apply.

# CANADA NET PROMOTER SCORE (NPS): BY SEGMENT

Canada ranks fifth in terms of NPS against the competitive set, with scores highest among Refined Globetrotters and Outdoor Explorers among the segments.



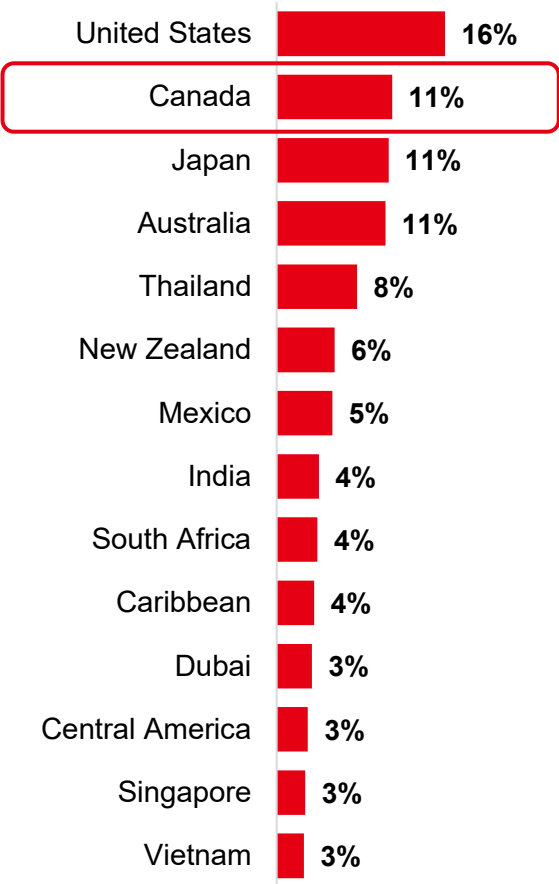
Net Promoter Score (NPS): This measure has an 11pt scale (0-10). The score is calculated by subtracting Detractors (0-6 rating) from Promoters (9-10 rating).  
Base: Long-haul pleasure travellers (past 3 years or next 2 years), Visited Canada: Total (n=569); Outdoor Explorers (n=124); Culture Seekers (n=116); Refined Globetrotters (n=130); Purpose Driven Families (n=36\*)  
C8. How likely are you to recommend each of the following holiday destinations to a friend, family member or colleague?  
\*Small base size, interpret with caution (n<50)



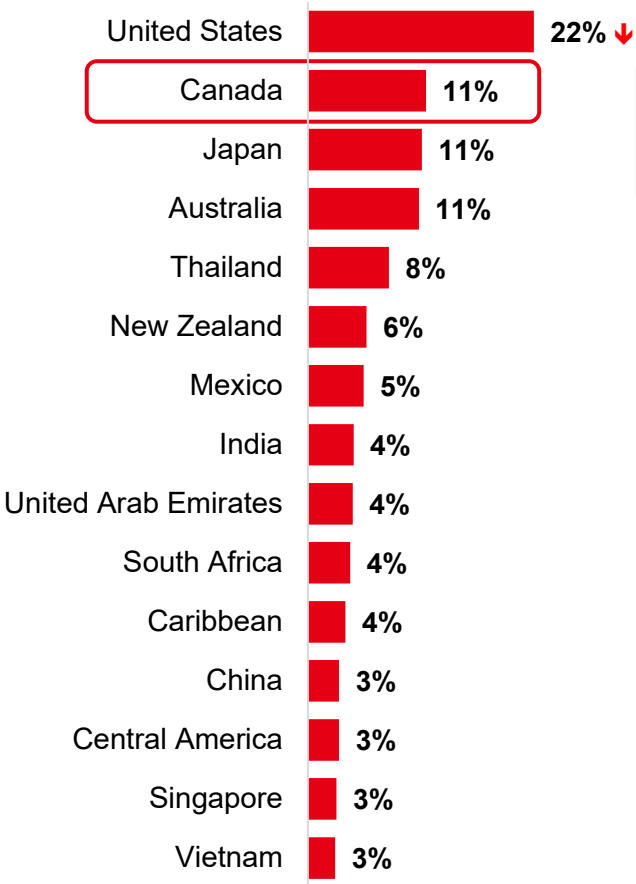
# UNAIDED DESTINATION CONSIDERATION (NEXT 2 YEARS)

Canada ranks second when it comes to destinations volunteered as being seriously considered for trips in the next 2 years, tied with Japan and Australia but behind the US.

Top Destination Brands<sup>1</sup>



Top Destinations<sup>2</sup>



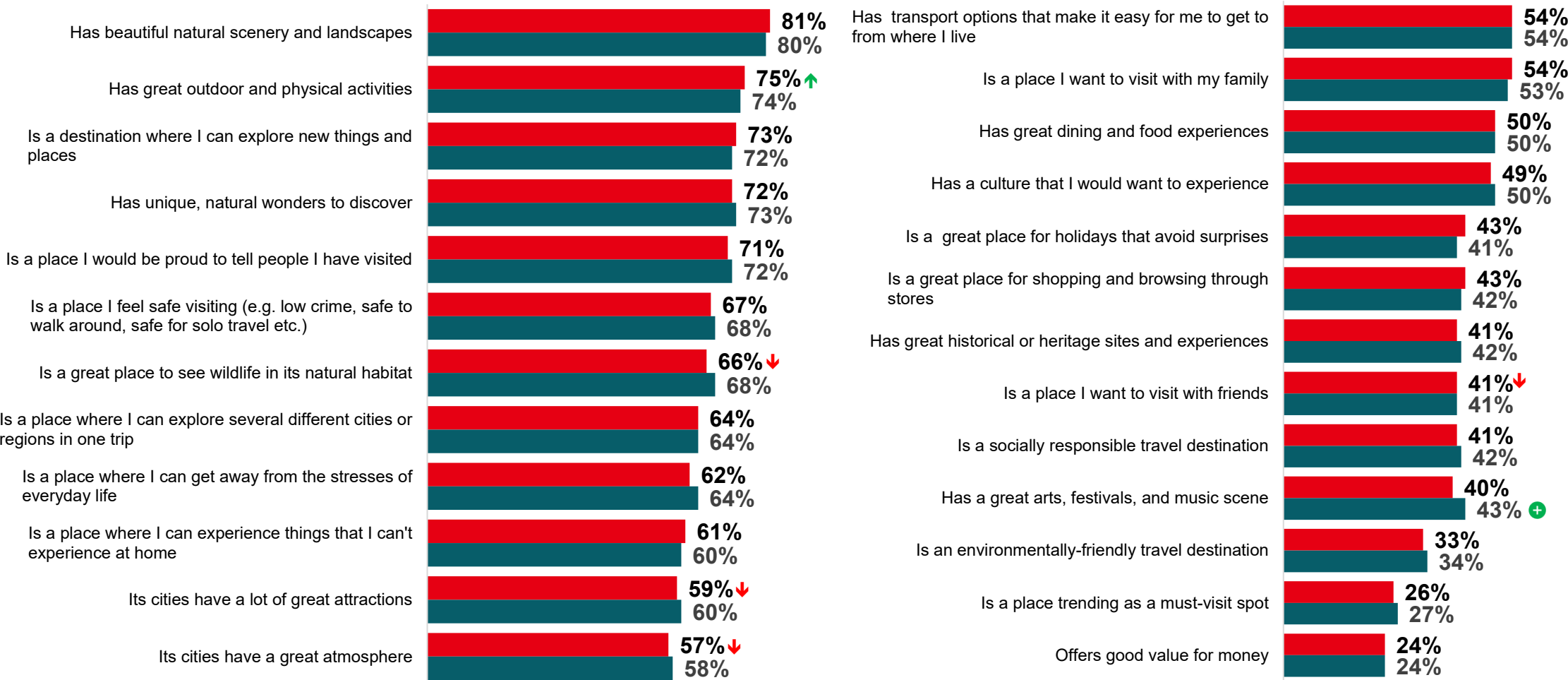
Canada:  
Outdoor Explorers: 15%  
Refined Globetrotters: 8%

<sup>1</sup> Responses as mentioned by respondents (e.g., percentage who said “Canada” specifically).  
<sup>2</sup> Roll-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)

# IMPRESSIONS OF CANADA AS A HOLIDAY DESTINATION

Canada is mainly associated with having beautiful scenery and landscapes and having great outdoor and physical activities.

Total United Kingdom HEG Audience



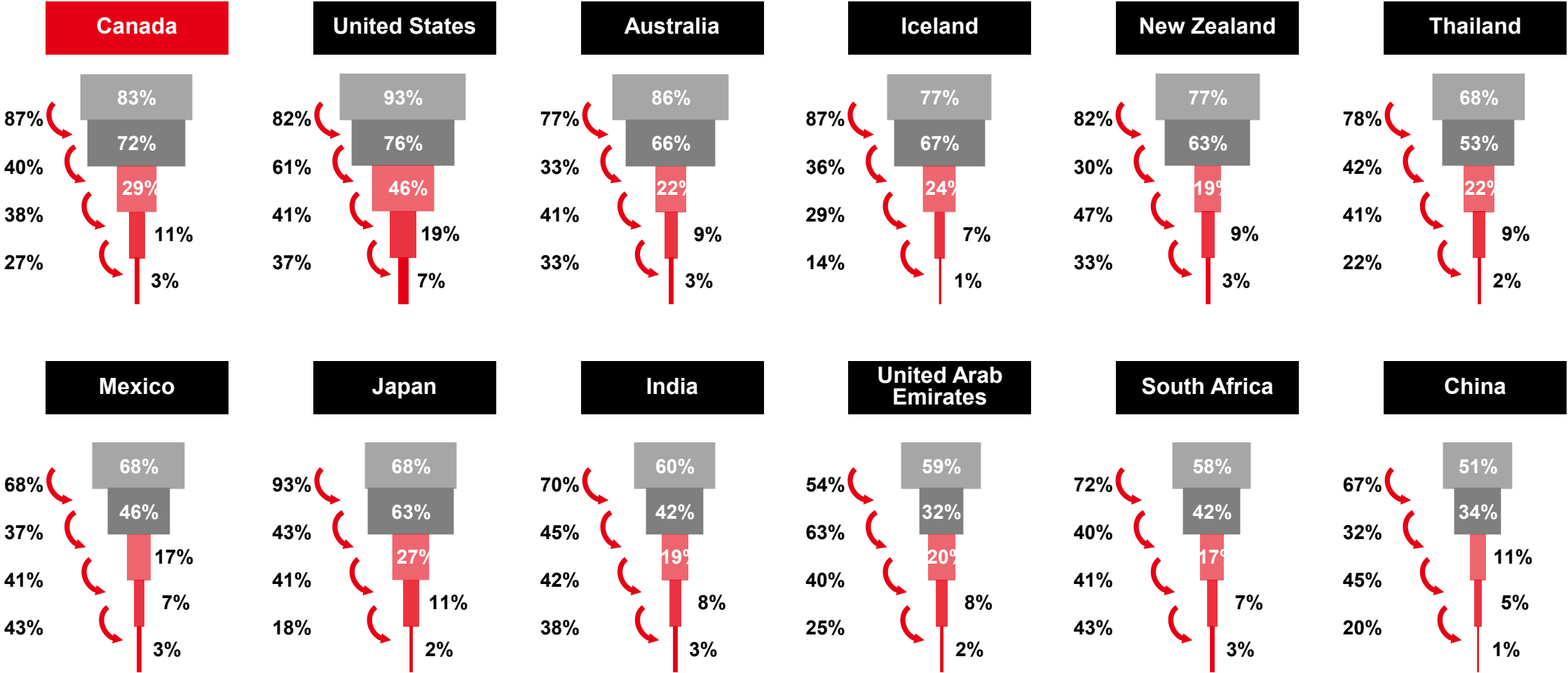
↑ / ↓ = significantly higher/lower result (2024 vs. 2023)  
+ / - = significantly higher/lower result (HEG vs. 2024 Total)

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) (n=1516); HEG (n=1039)  
C6. 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.

# CONSIDERATION FUNNELS: TOTAL UNITED KINGDOM

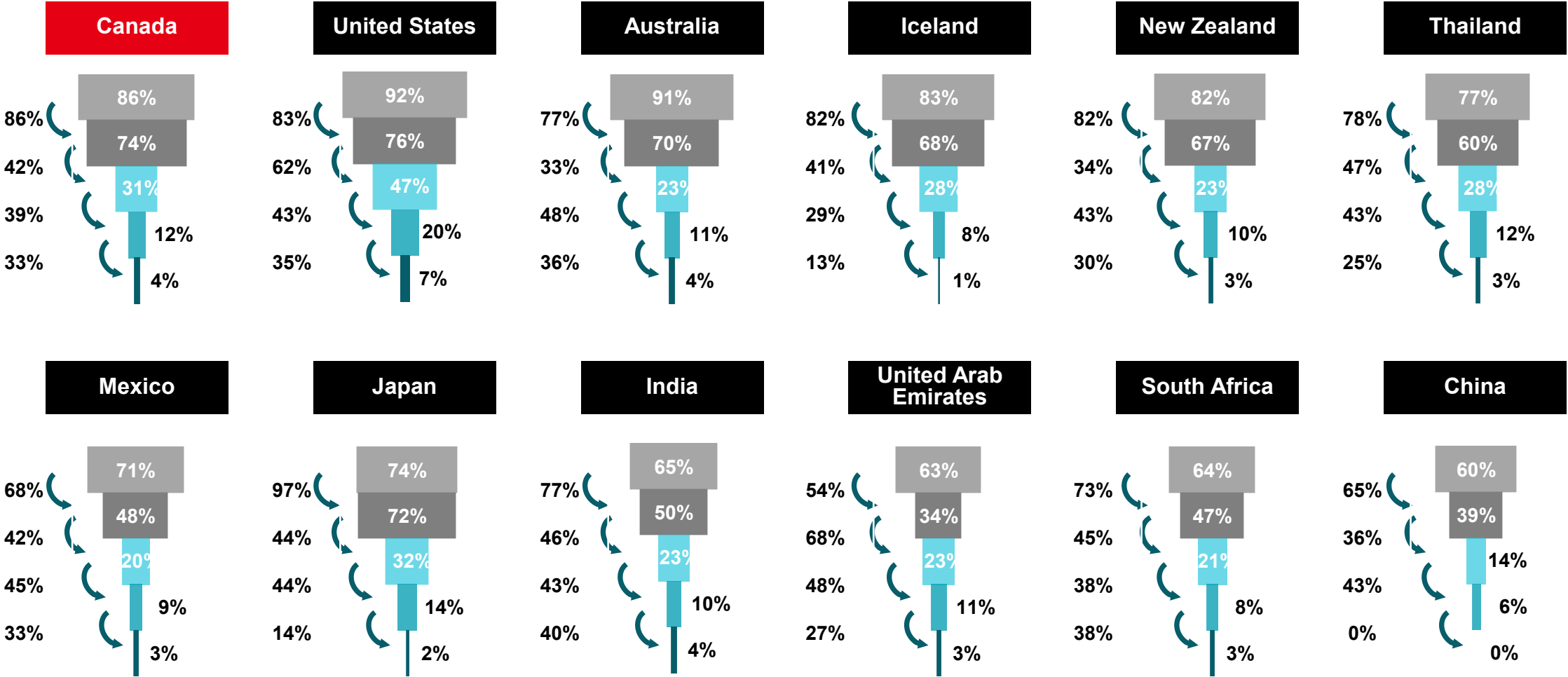
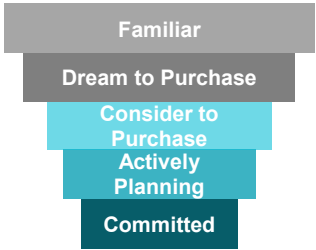


29% UK travellers are considering a trip to Canada in the next two years, ahead of Japan and Australia. However, Canada trails the US significantly as a result of lower conversion between dream to purchase and serious consideration.



# CONSIDERATION FUNNELS: AMONG HEG TRAVELLERS

Among HEGs, Japan starts to overtake Canada at consideration and actively planning.

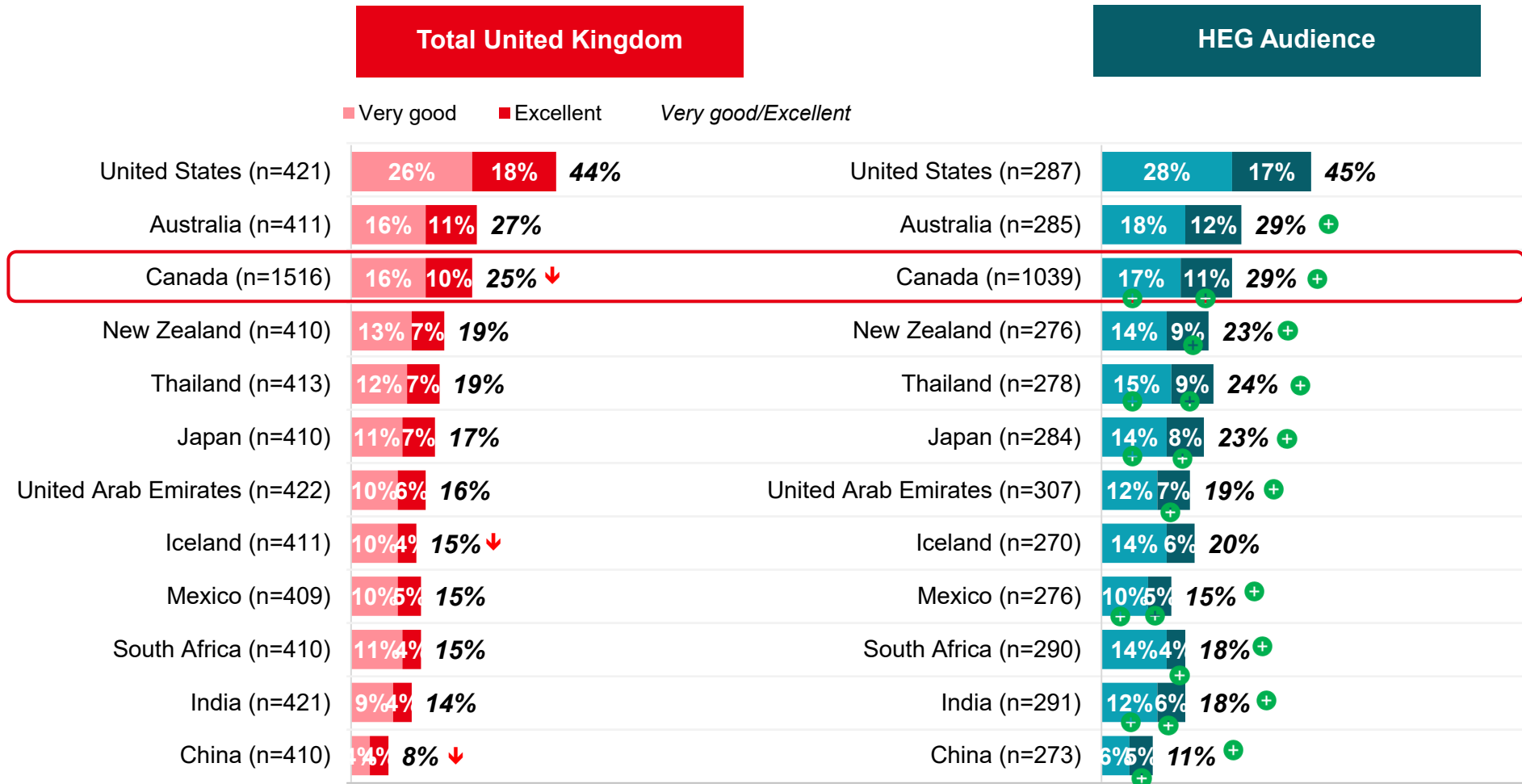


Note: all respondents evaluated Canada plus 3 randomly selected countries from the competitive set.  
Base: Long-haul pleasure travellers (past 3 years or next 2 years), HEG, Evaluated [DESTINATION]  
See notes for question wording and funnel definitions



# LEVEL OF KNOWLEDGE OF HOLIDAY OPPORTUNITIES

Canada ranks third overall in knowledge of holiday opportunities among UK travellers, with scores down compared to last year.



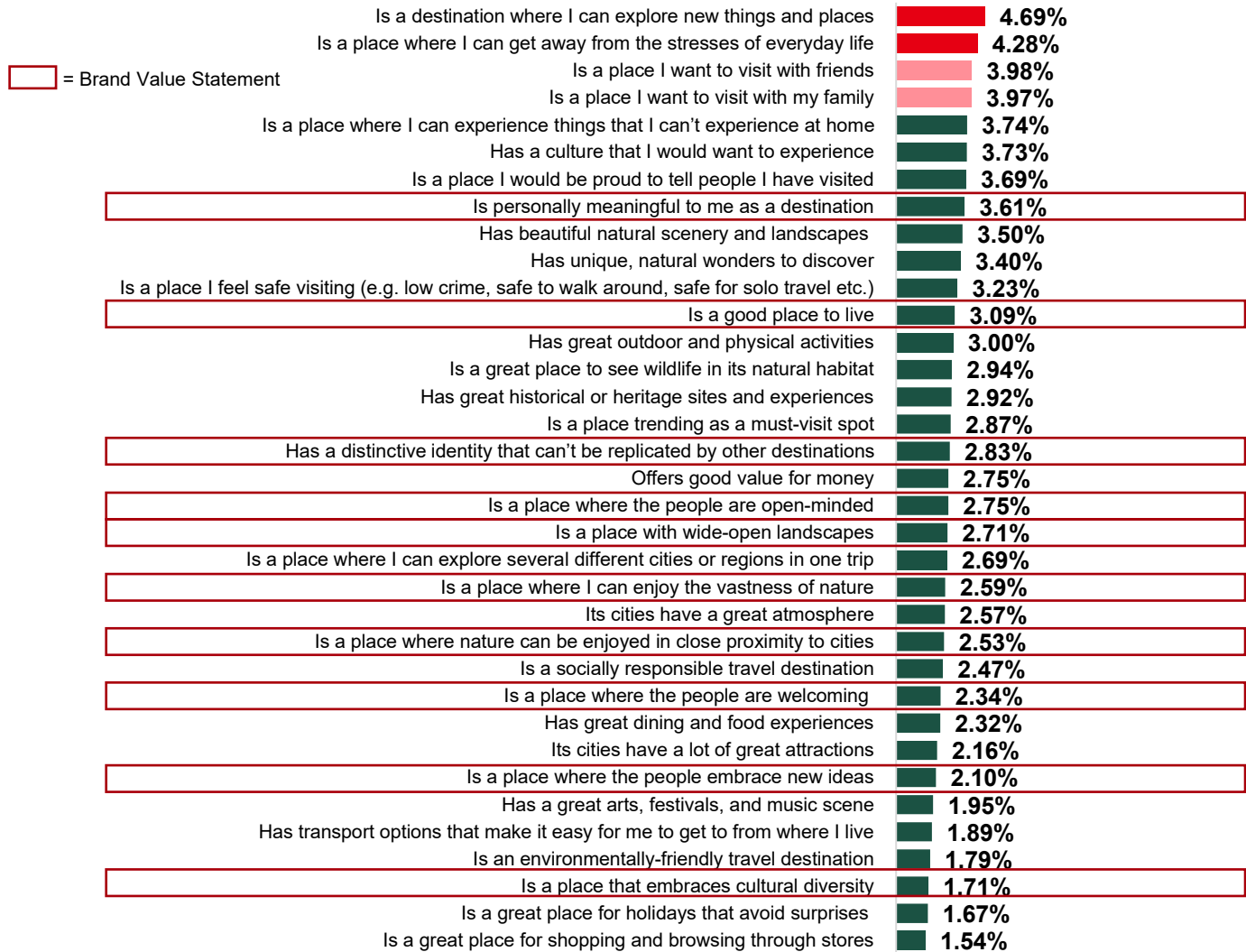
↑ / ↓ = significantly higher/lower result (2024 vs. 2023)  
+ / - = significantly higher/lower result (HEG vs. 2024 Total)

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 [DESTINATION]  
C5. How would you rate your level of knowledge of holiday opportunities in each of the following destinations? (Select one for each)

# KEY DRIVERS

# DESTINATION ATTRIBUTES: DRIVERS ANALYSIS (OUTDOOR EXPLORERS)

*For Outdoor Explorers, key drivers of destination consideration include being a destination where they can explore new things and places and where they can get away from everyday life. Being a place to visit with family or friends are secondary drivers.*



## Description

Key drivers analysis (KDA) seeks to identify the strongest predictors of a dependent variable. In this case, we used consideration of a destination (C2) as the dependent variable. The analysis uses a mix of linear and logistic regressions, assessing the simultaneous effect of many independent variables, destination attributes (C6) while controlling for each other.

## Interpretation

Attributes with a high percentage level are more likely to impact consideration of a destination. This generally means that destinations that score highly on the top attributes may have higher consideration levels. Each percentage does also indicate the degree of relative impact. An attribute with a score of 5% is twice as impactful on consideration as an attribute with a score of 2.5%.

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), Outdoor Explorers (n=323)  
C6. 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.

DESTINATION ATTRIBUTES: RELATIVE STRENGTHS & WEAKNESSES (OUTDOOR EXPLORERS)



To OEs, Canada is a place they feel safe visiting, a great place for holidays that avoid surprises, and is a socially responsible travel destination. There is currently an open opportunity being a place to visit with friends, a secondary driver.

		Canada	Australia	China	Iceland	India	Japan	Mexico	New Zealand	South Africa	Thailand	United Arab Emirates	United States
	n=	323	82	87	98	91	71	91	90	87	81	100	91
Higher Order Motivations	Is a place where I can get away from the stresses of everyday life												
	Is a place I would be proud to tell people I have visited												
	Is a destination where I can explore new things and places												
General Needs	Is a place I feel safe visiting (e.g. low crime, safe to walk around, safe for solo travel etc.)												
	Is a place where I can explore several different cities or regions in one trip												
	Offers good value for money												
	Has transport options that make it easy for me to get to from where I live												
Type of Trip	Is a place I want to visit with friends												
	Is a place I want to visit with my family												
	Is a great place for holidays that avoid surprises												
	Is a place where I can experience things that I can't experience at home												
	Is an environmentally-friendly travel destination												
	Is a socially responsible travel destination												
	Is a place trending as a must-visit spot												
To-Do	Is a great place for shopping and browsing through stores												
	Its cities have a lot of great attractions												
	Has great outdoor and physical activities												
	Has great dining and food experiences												
	Has a great arts, festivals, and music scene												
To-See	Its cities have a great atmosphere												
	Has beautiful natural scenery and landscapes												
	Is a great place to see wildlife in its natural habitat												
	Has great historical or heritage sites and experiences												
	Has a culture that I would want to experience												
	Has unique, natural wonders to discover												

No destination has a strength for this statement

Strength

Weakness

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), Outdoor Explorers, Evaluated [DESTINATION]  
C6. 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 VALUE STATEMENTS (OUTDOOR EXPLORERS)

*In terms of brand value statements, Canada is seen as a place with wide-open landscapes, has people that are open-minded, is a good place to live and is a place where they can enjoy the vastness of nature.*

	Canada	Australia	China	Iceland	India	Japan	Mexico	New Zealand	South Africa	Thailand	United Arab Emirates	United States
n=	323	82	87	98	91	71	91	90	87	81	100	91
Is a place with wide-open landscapes												
Is a place where nature can be enjoyed in close proximity to cities												
Is a place that embraces cultural diversity												
Is a place where the people are welcoming												
Is a place where the people are open-minded												
Is a place where the people embrace new ideas												
Is a good place to live												
Has a distinctive identity that can't be replicated by other destinations												
Is personally meaningful to me as a destination												
Is a place where I can enjoy the vastness of nature												

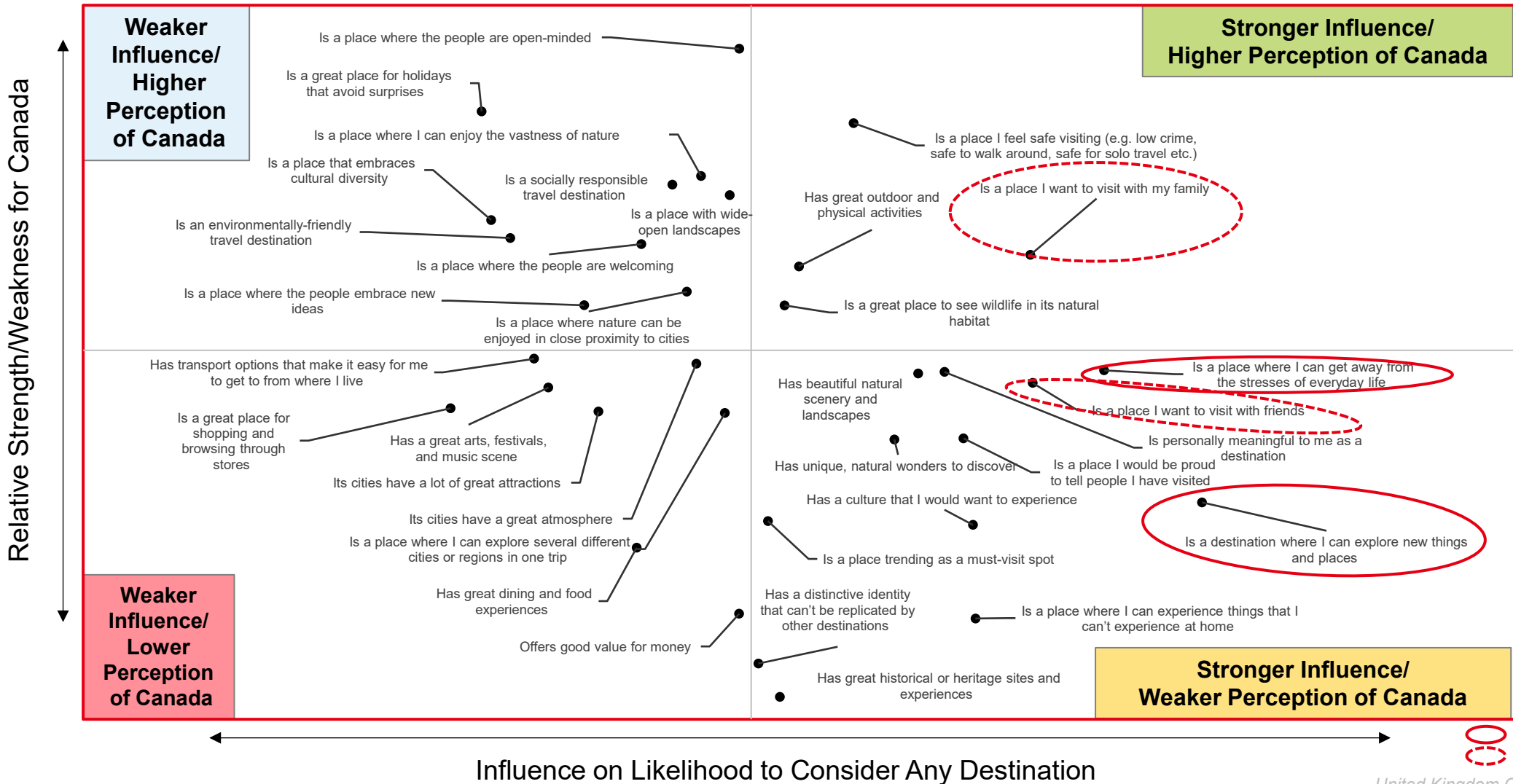
No destination has a strength for this statement

Strength Weakness

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), Outdoor Explorers, Evaluated [DESTINATION]  
C6. 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.

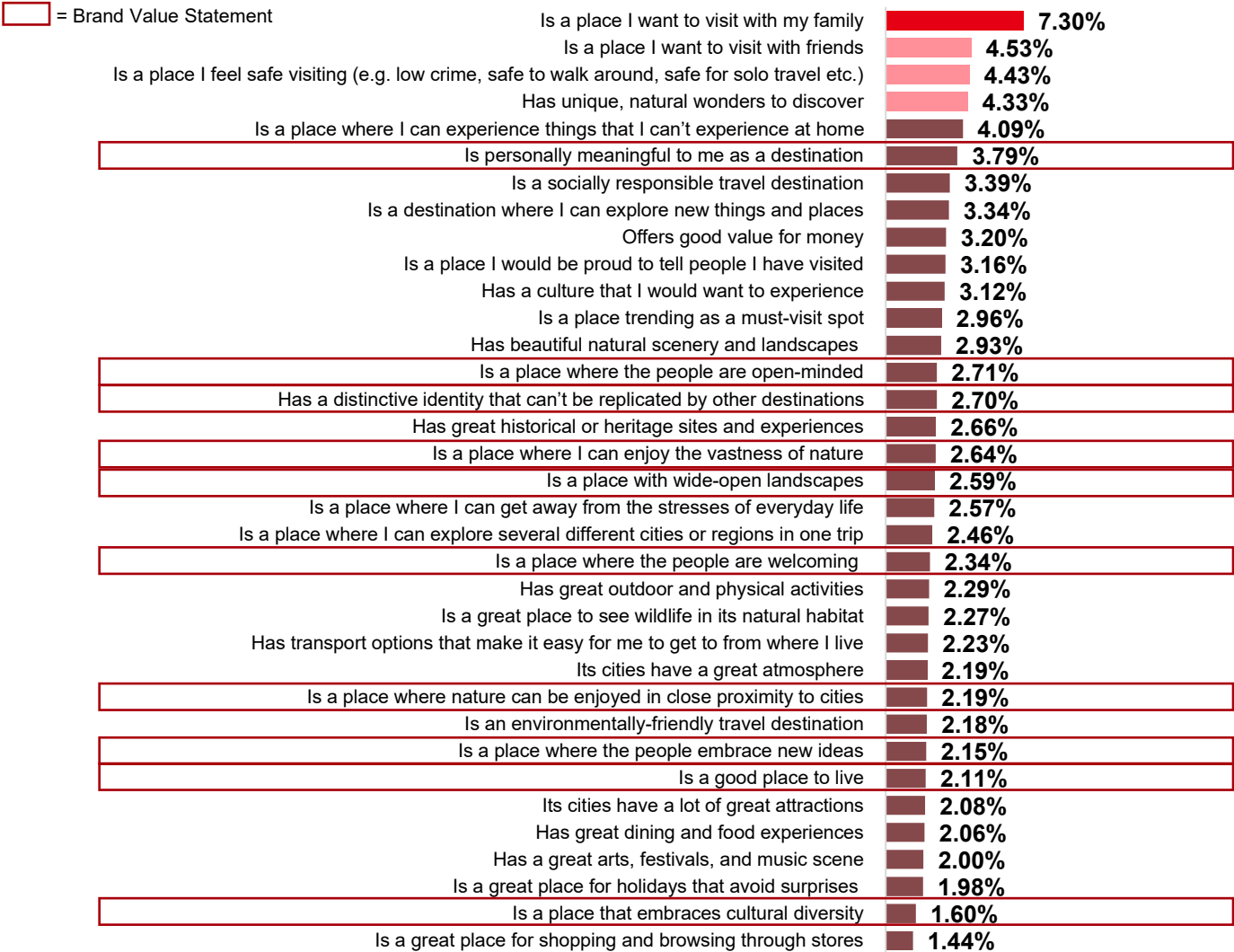
# CANADA STRENGTHS & OPPORTUNITIES (OUTDOOR EXPLORERS)

Perceptions of Canada being a place I want to visit with family is high and should continue to be maintained. However, there is opportunity to further develop perceptions of Canada as being a place where I can explore new things and places, get away from the stresses of everyday life, and being a place I want to visit with friends.



# DESTINATION ATTRIBUTES: DRIVERS ANALYSIS (REFINED GLOBETROTTERS)

*Being a place I want to visit with family is the top driver for Refined Globetrotters as they consider destinations. Secondary drivers include being a place I want to visit with friends, a place I feel safe visiting, and has unique, natural wonders to discover.*



### Description

Key drivers analysis (KDA) seeks to identify the strongest predictors of a dependent variable. In this case, we used consideration of a destination (C2) as the dependent variable. The analysis uses a mix of linear and logistic regressions, assessing the simultaneous effect of many independent variables, destination attributes (C6) while controlling for each other.

### Interpretation

Attributes with a high percentage level are more likely to impact consideration of a destination. This generally means that destinations that score highly on the top attributes may have higher consideration levels. Each percentage does also indicate the degree of relative impact. An attribute with a score of 5% is twice as impactful on consideration as an attribute with a score of 2.5%.

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), Refined Globetrotters (n=354)  
C6. 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.

DESTINATION ATTRIBUTES: RELATIVE STRENGTHS & WEAKNESSES (REFINED GLOBETROTTERS)



Similar to OEs, Canada is a place RGs feel safe visiting, is a great place for holidays that avoid surprises, and is a socially responsible travel destination. There is currently an open opportunity around the key driver of being a place to visit with family.

		Canada	Australia	China	Iceland	India	Japan	Mexico	New Zealand	South Africa	Thailand	United Arab Emirates	United States
	n=	354	91	100	85	93	110	102	88	102	104	106	81
Higher Order Motivations	Is a place where I can get away from the stresses of everyday life												
	Is a place I would be proud to tell people I have visited												
General Needs	Is a destination where I can explore new things and places												
	Is a place I feel safe visiting (e.g. low crime, safe to walk around, safe for solo travel etc.)												
	Is a place where I can explore several different cities or regions in one trip												
	Offers good value for money												
Type of Trip	Has transport options that make it easy for me to get to from where I live												
	Is a place I want to visit with friends												
	Is a place I want to visit with my family												
	Is a great place for holidays that avoid surprises												
	Is a place where I can experience things that I can't experience at home												
	Is an environmentally-friendly travel destination												
To-Do	Is a socially responsible travel destination												
	Is a place trending as a must-visit spot												
	Is a great place for shopping and browsing through stores												
	Its cities have a lot of great attractions												
	Has great outdoor and physical activities												
To-See	Has great dining and food experiences												
	Has a great arts, festivals, and music scene												
	Its cities have a great atmosphere												
	Has beautiful natural scenery and landscapes												
	Is a great place to see wildlife in its natural habitat												
	Has great historical or heritage sites and experiences												
	Has a culture that I would want to experience												
	Has unique, natural wonders to discover												

No destination has a strength for this statement

StrengthWeakness

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), Refined Globetrotters, Evaluated [DESTINATION]  
C6. 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 VALUE STATEMENTS (REFINED GLOBETROTTERS)

*RGs believe Canada has a strong association with most of the brand value statements, being a place with wide-open landscapes, embraces diversity, where people are welcoming, is a good place to live, and is a place where I can enjoy the vastness of nature.*

	Canada	Australia	China	Iceland	India	Japan	Mexico	New Zealand	South Africa	Thailand	United Arab Emirates	United States
n=	354	91	100	85	93	110	102	88	102	104	106	81
Is a place with wide-open landscapes	Strength	Strength			Weakness	Weakness			Strength	Weakness	Weakness	
Is a place where nature can be enjoyed in close proximity to cities						Weakness			Strength		Weakness	Weakness
Is a place that embraces cultural diversity	Strength		Weakness	Weakness				Strength			Weakness	
Is a place where the people are welcoming			Weakness							Strength	Weakness	
Is a place where the people are open-minded	Strength	Strength		Strength	Weakness	Weakness		Strength	Weakness		Weakness	
Is a place where the people embrace new ideas						Strength	Weakness		Weakness	Weakness		
Is a good place to live	Strength	Strength	Weakness		Weakness		Weakness	Strength	Weakness	Weakness		
Has a distinctive identity that can't be replicated by other destinations	Weakness	Weakness	Strength		Strength	Strength		Weakness			Strength	Weakness
Is personally meaningful to me as a destination												
Is a place where I can enjoy the vastness of nature	Strength	Strength			Weakness	Weakness			Strength	Weakness	Weakness	

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), Refined Globetrotters, Evaluated [DESTINATION]  
C6. 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.

No destination has a strength for this statement

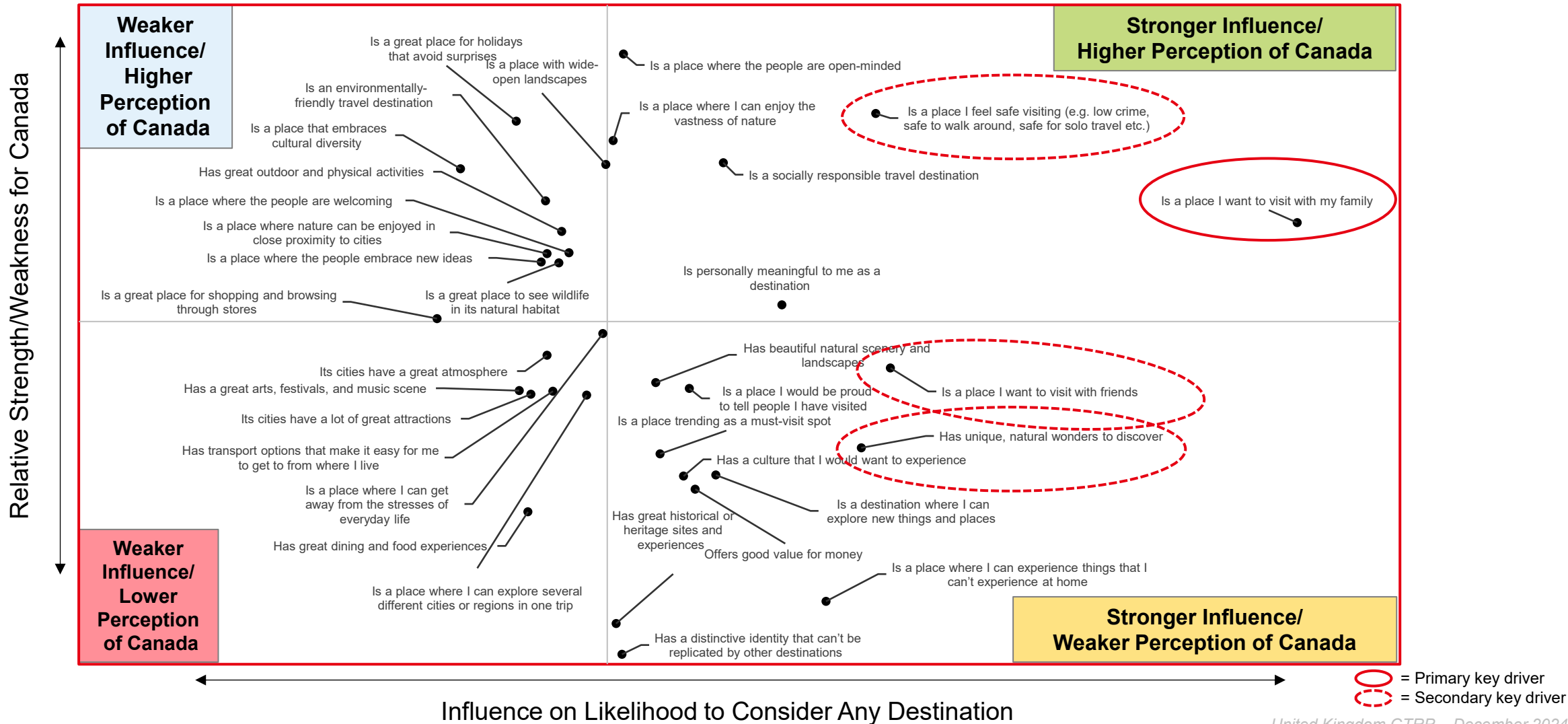
Strength

Weakness



# CANADA STRENGTHS & OPPORTUNITIES (REFINED GLOBETROTTERS)

*Perceptions of Canada as being a place I want to visit with family and where I feel safe visiting is high and should continue to be maintained. That said, there is opportunity to further develop perceptions of Canada being a destination I want to visit with friends and having unique, natural wonders to discover.*



# SEASONAL TRAVEL



Dezadeash River  
Yukon

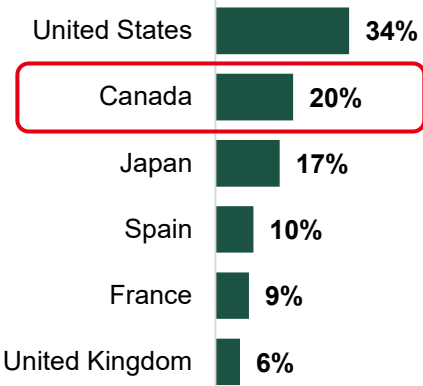
# TOP UNAIDED FALL DESTINATIONS: BY SEGMENTS

Canada ranks highly as a top unaided fall destination, but trails behind the US in all segments, as well as Spain among CSs.



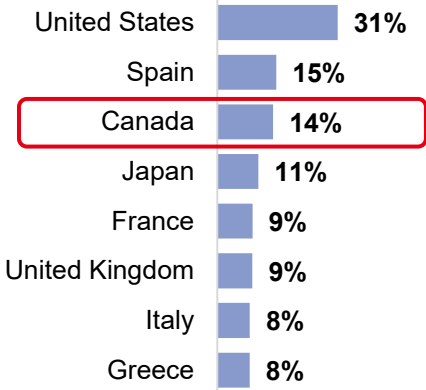
## Outdoor Explorers

(n=174)



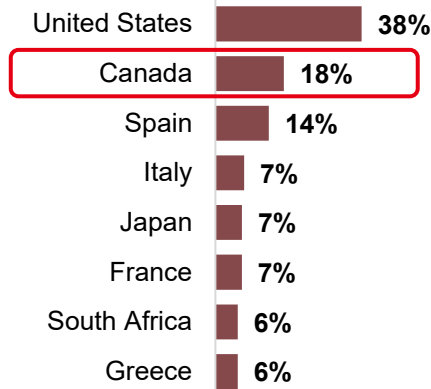
## Culture Seekers

(n=132)



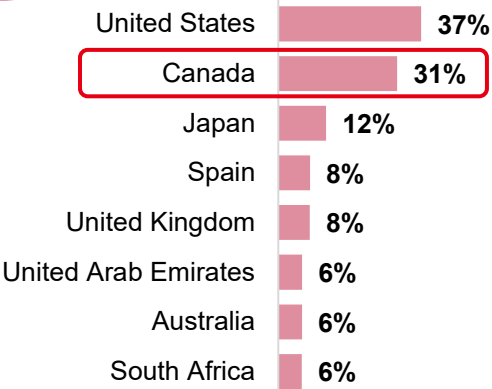
## Refined Globetrotters

(n=175)



## Purpose Driven Families

(n=49\*)



Note: respondents were asked either about winter travel (B2/D2/E13) or autumn travel (B3/D3/E14)  
Base: Long-haul pleasure travellers (past 3 years or next 2 years)  
B3. What destinations come to mind when thinking about travel to experience the **autumn season**? (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.  
\*Small base size, interpret with caution (n<50)

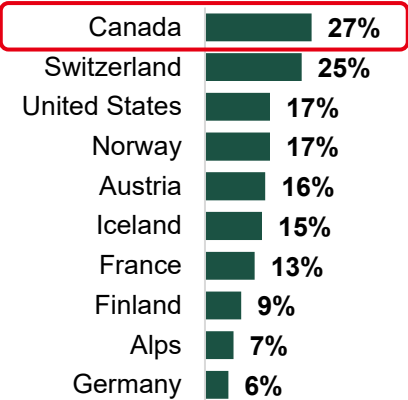


# TOP UNAIDED WINTER DESTINATIONS: BY SEGMENTS

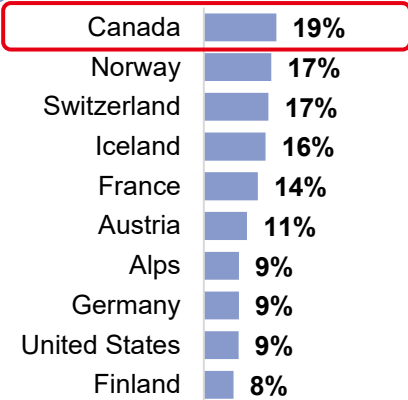
Canada is the most top of mind Winter destination among OEs, CSs and RGs. Among PDFs, Canada ranks second, behind Switzerland.



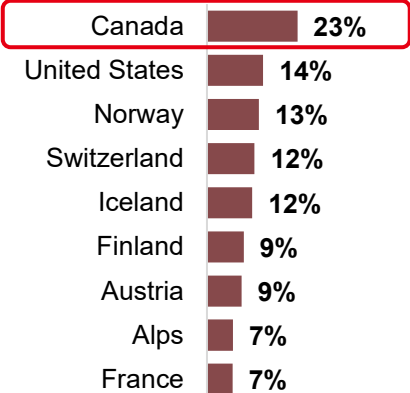
## Outdoor Explorers (n=149)



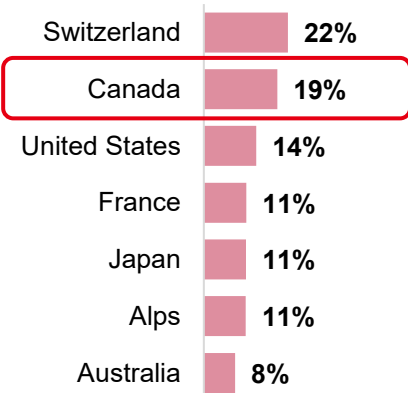
## Culture Seekers (n=144)



## Refined Globetrotters (n=179)



## Purpose Driven Families (n=37\*)



Note: respondents were asked either about winter travel (B2/D2/E13) or autumn travel (B3/D3/E14)  
Base: Long-haul pleasure travellers (past 3 years or next 2 years)  
B2. What destinations come to mind when thinking about travel to experience the **winter season**? (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.  
\*Small base size, interpret with caution (n<50)

# SEASONAL CONSIDERATION BY DESTINATION

Canada sees its highest seasonal consideration during the Summer and Fall months. Consideration is lowest in the Winter months, but this increases among HEGs.

Total United Kingdom	Winter (Dec, Jan, Feb)	Spring (Mar, Apr, May)	Summer (Jun, Jul, Aug)	Fall (Sept, Oct, Nov)	HEG Audience	Winter (Dec, Jan, Feb)	Spring (Mar, Apr, May)	Summer (Jun, Jul, Aug)	Fall (Sept, Oct, Nov)
Australia (n=270)	50%	39%	26%	49%	Australia (n=201)	49%	41%	26%	50%
Canada (n=1088)	22%	43%	55%	46% ↓	Canada (n=766)	24% +	43%	54%	47%
China (n=141)	30%	46%	42%	39%	China (n=108)	34% +	43%	38%	42%
Iceland (n=274)	32% ↓	41%	41%	44%	Iceland (n=185)	31%	44%	42%	48%
India (n=176)	41%	42%	21%	37%	India (n=145)	39%	40%	19%	35%
Japan (n=258)	21%	56%	39%	42%	Japan (n=204)	20%	56%	38%	45%
Mexico (n=188)	34%	42%	38%	44%	Mexico (n=133)	37%	38%	38%	44%
New Zealand (n=257)	43%	38%	28%	42%	New Zealand (n=185)	45%	42%	31%	42%
South Africa (n=173)	35%	43%	31%	39%	South Africa (n=137)	36%	42%	29%	38%
Thailand (n=219)	42%	45%	32%	45%	Thailand (n=166)	46% +	45%	29%	47%
United Arab Emirates (n=134)	43%	42%	22%	40%	United Arab Emirates (n=106)	43%	41%	21%	42%
United States (n=322)	32%	47%	53%	48%	United States (n=217)	35%	47%	54%	49%

↑ / ↓ = significantly higher/lower result (2024 vs. 2023)  
+ / - = significantly higher/lower result (HEG vs. 2024 Total)

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), Those in the dream to purchase stages of the path to purchase for [DESTINATION]  
C7. For each of the following destinations, during which months would you consider taking a holiday trip in the next 2 years?



# FALL/WINTER CONVERSION – TOTAL UNITED KINGDOM

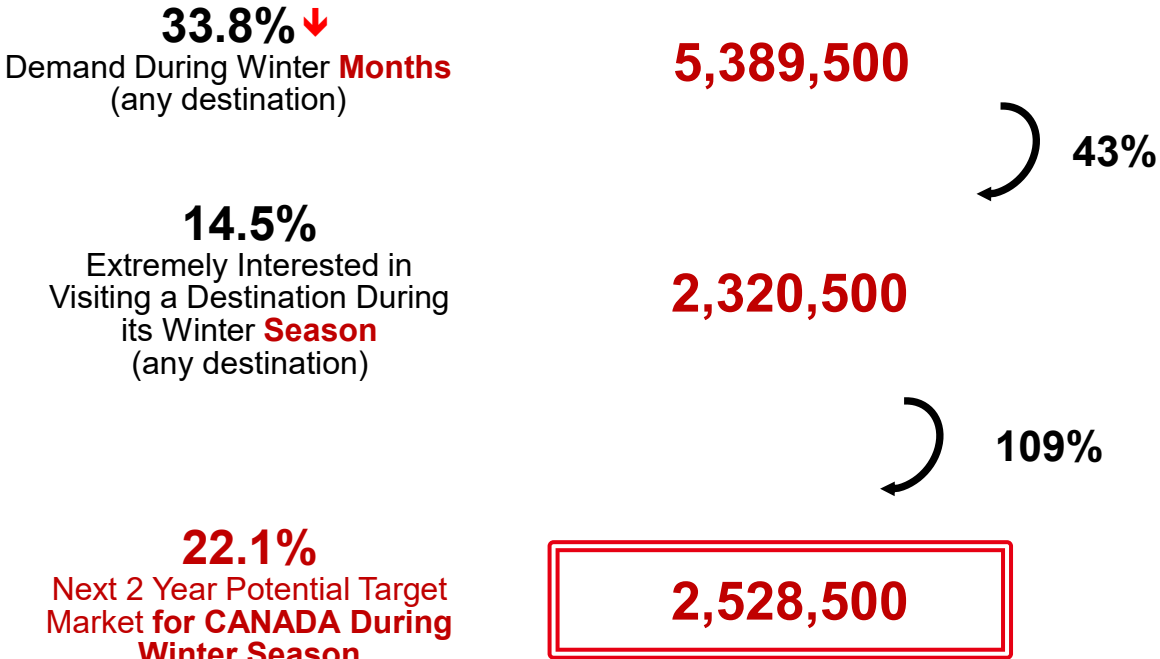
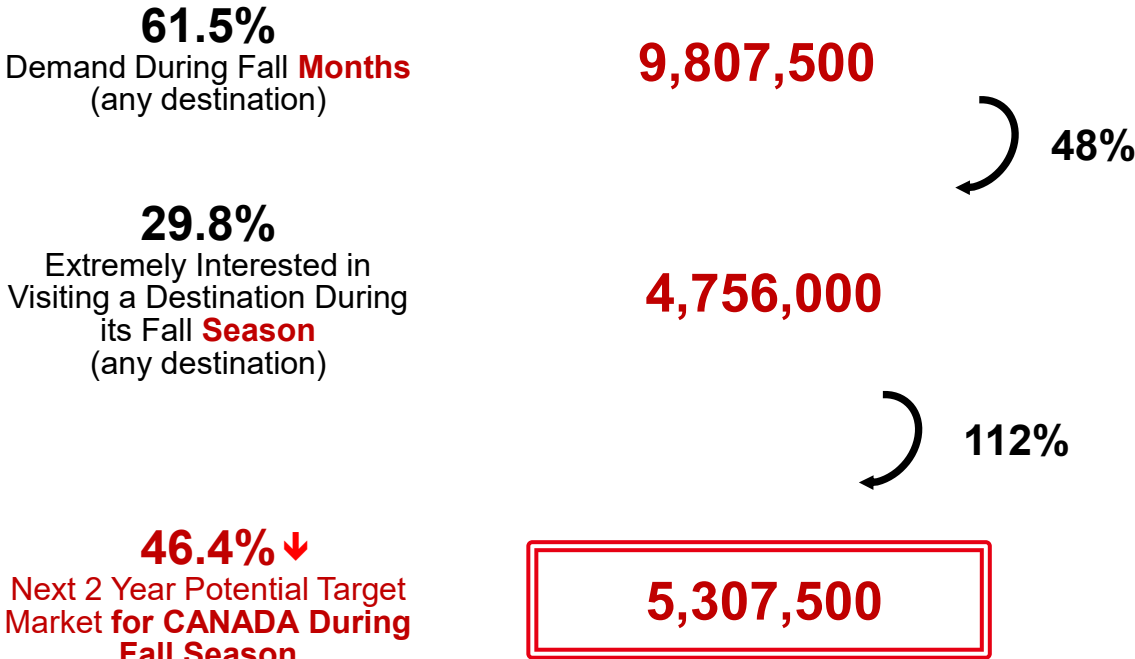
There is similar conversion between those who typically travel during the Fall months and interest in taking a trip during a destination’s Fall season (48%) and between those who typically travel during the Winter months to those interested in taking a trip during the destination’s Winter season (43%). That said, Canada’s two-year immediate potential from the UK for Fall (5.3M) is more than double that of Winter (2.5M).



Fall



Winter



Base: Long-haul pleasure travellers (past 3 years or next 2 years)  
D1. In general, what time of year do you typically like to take holiday trips? Select all that apply Total (n=1516)  
D3. In general, how interested are you in taking a holiday trip to a destination during its autumn season? Total (n=762)  
D2. In general, how interested are you in taking a holiday trip to a destination during its winter season? Total (n=754)  
C7. For each of the following destinations, during which months would you consider taking long-haul trip in the next two years? Total (n=1088)

# FALL/WINTER CONVERSION – HEGS

*This is similar among HEGs, with 3.8M HEGs interested in taking a trip to Canada in the Fall compared to 1.9M for Winter.*



Fall



Winter

**62.6%**  
Demand During Fall Months  
(any destination)

6,843,500

55%

**34.5%**  
Extremely Interested in  
Visiting a Destination During  
its Fall Season  
(any destination)

3,778,500

101%

**47.3%**  
Next 2 Year Potential Target  
Market for CANADA During  
Fall Season

3,812,000

**35.3%**  
Demand During Winter Months  
(any destination)

3,858,000

49%

**17.2%**  
Extremely Interested in  
Visiting a Destination During  
its Winter Season  
(any destination)

1,886,000

102%

**23.8%**  
Next 2 Year Potential Target  
Market for CANADA During  
Winter Season

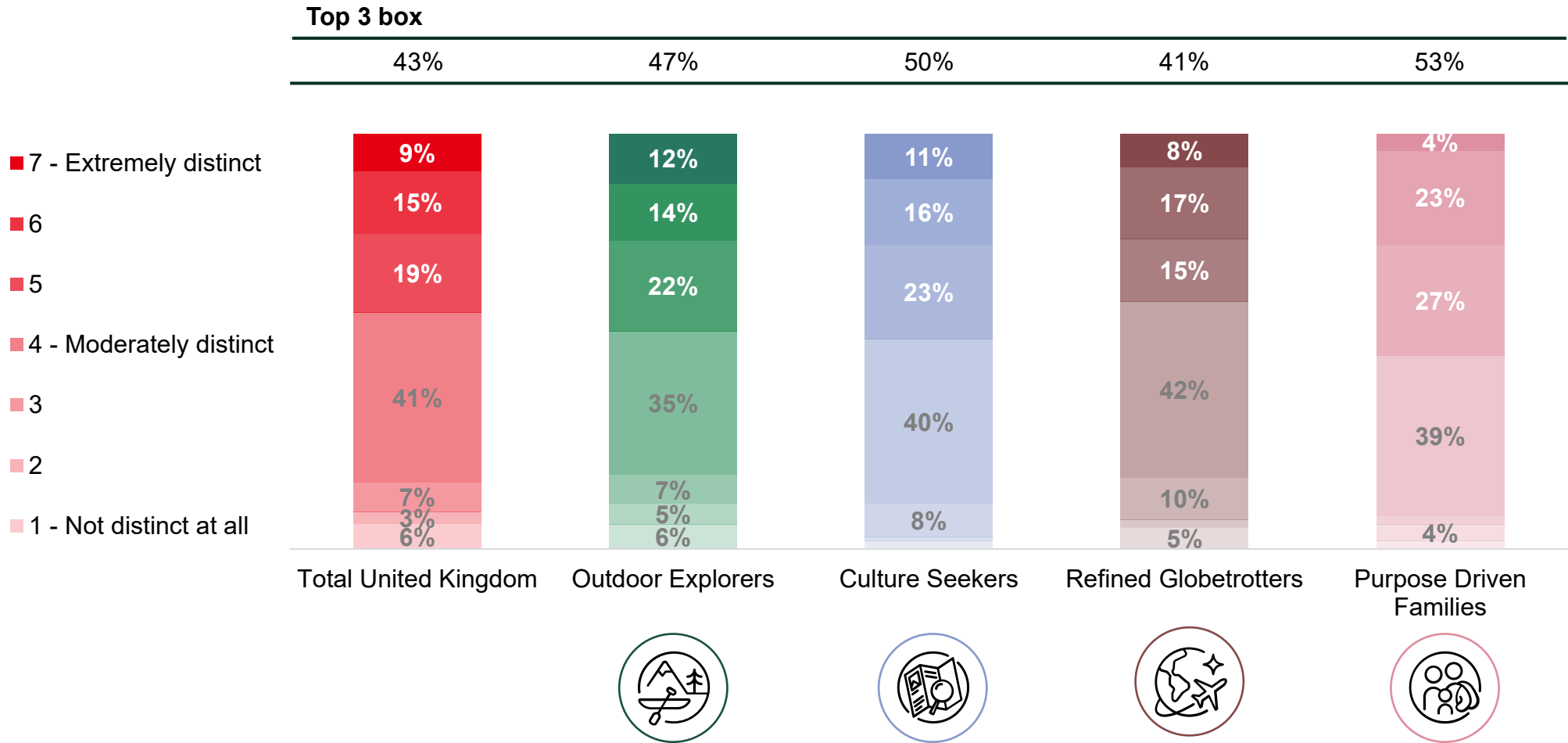
1,918,000

Base: Long-haul pleasure travellers (past 3 years or next 2 years), HEGs  
D1. In general, what time of year do you typically like to take holiday trips? Select all that apply (n=1039)  
D3. In general, how interested are you in taking a holiday trip to a destination during its autumn season? (n=530)  
D2. In general, how interested are you in taking a holiday trip to a destination during its winter season? (n=509)  
C7. For each of the following destinations, during which months would you consider taking long-haul trip in the next two years? (n=766)



# UNIQUENESS OF CANADA AS FALL DESTINATION: BY SEGMENTS

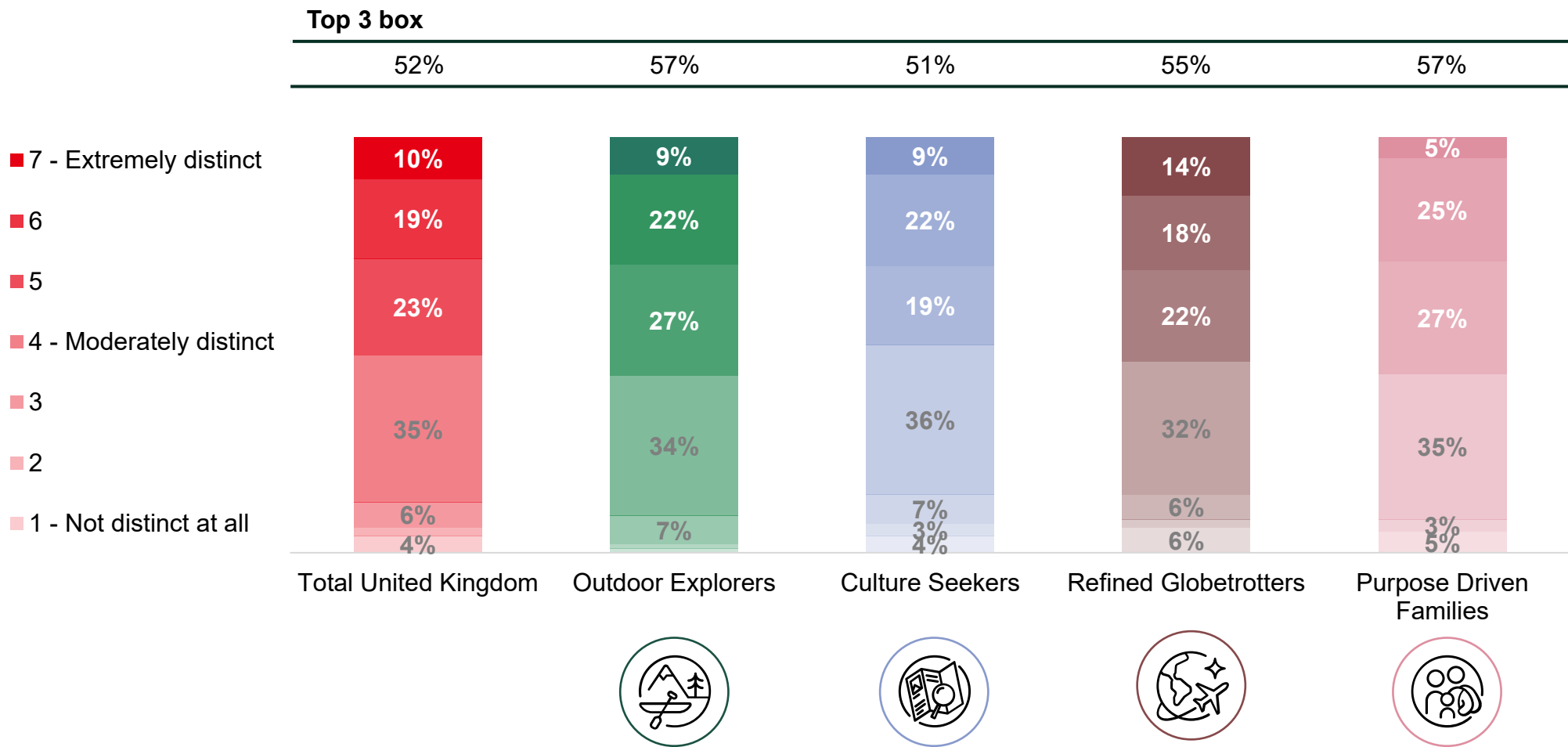
Over four in ten UK travellers perceive Canada as a distinct Fall destination, this is higher among Purpose Driven Families, followed by Culture Seekers.



Note: respondents were asked either about winter travel (B2/D2/E13) or autumn travel (B3/D3/E14)  
Base: Long-haul pleasure travellers (past 3 years or next 2 years): Total (n=762); Outdoor Explorers (n=174); Culture Seekers (n=132); Refined Globetrotters (n=175); Purpose Driven Families (n=49\*)  
E14. How distinct is Canada as an autumn travel destination?  
\*Small base size, interpret with caution (n<50)

# UNIQUENESS OF CANADA AS WINTER DESTINATION: BY SEGMENTS

Over one-half of UK travellers view Canada as a distinct Winter destination, slightly higher among Outdoor Explorers and Purpose Driven Families.



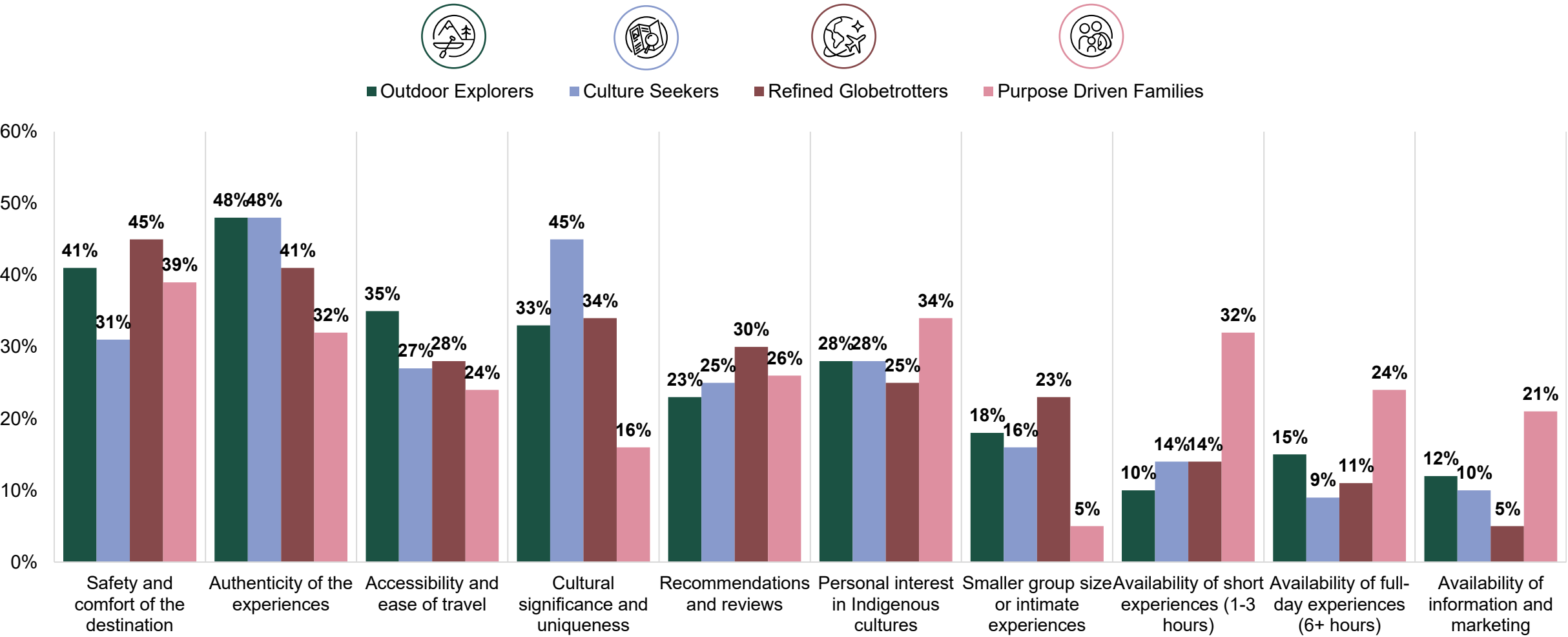
Note: respondents were asked either about winter travel (B2/D2/E13) or autumn travel (B3/D3/E14)  
Base: Long-haul pleasure travellers (past 3 years or next 2 years): Total (n=754); Outdoor Explorers (n=149); Culture Seekers (n=144); Refined Globetrotters (n=179); Purpose Driven Families (n=37\*)  
E13. How distinct is Canada as a winter travel destination?  
\*Small base size, interpret with caution (n<50)

# INDIGENOUS TRAVEL



Carcross  
Yukon

Safety/comfort, authenticity, accessibility and ease of travel are the factors most likely to drive interest in Indigenous experiences. RGs place the highest importance on safety/comfort, while OEs and CSs select authenticity as the most important factor.



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): Outdoor Explorers (n=153); Culture Seekers (n=139); Refined Globetrotters (n=184); Purpose Driven Families (n=38\*)  
C11. What factors would increase your interest in participating in Indigenous cultural experiences and tourism activities in a destination? (Select up to 3)  
\*Small base size, interpret with caution (n<50)



# TRAVEL BEHAVIOURS

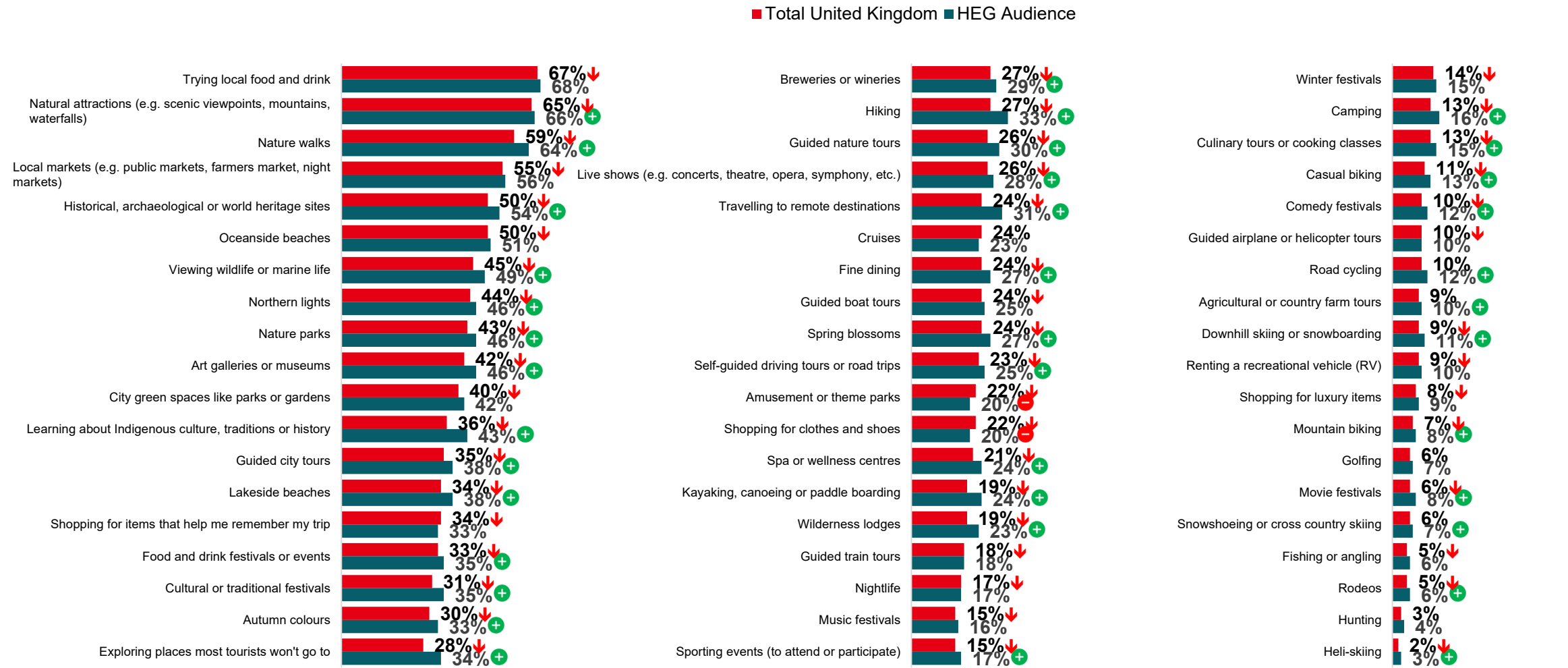
FARINE  
FIVE ROSES



Montreal  
Quebec

# GENERAL ACTIVITIES INTERESTED IN

Top activities on any holiday include trying local food and drinks, natural attractions, and nature walks. In general, HEGs are interested in more activities than the average UK traveller.

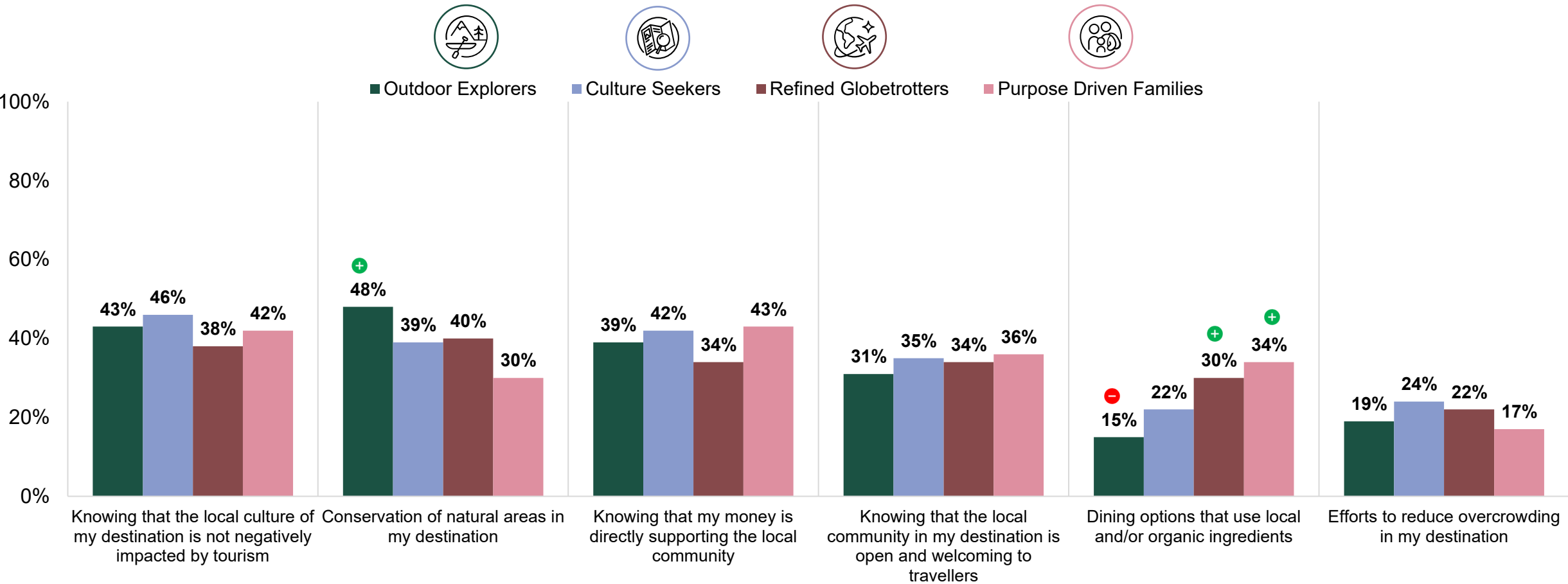


↑ / ↓ = significantly higher/lower result (2024 vs. 2023)  
+ / - = significantly higher/lower result (HEG vs. 2024 Total)

Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=1516); HEG (n=1039)  
D4. In general, what activities or places are you interested in while on holiday? (Select all that apply)

# MOST IMPORTANT SUSTAINABILITY EFFORTS (TOP 6): BY SEGMENTS

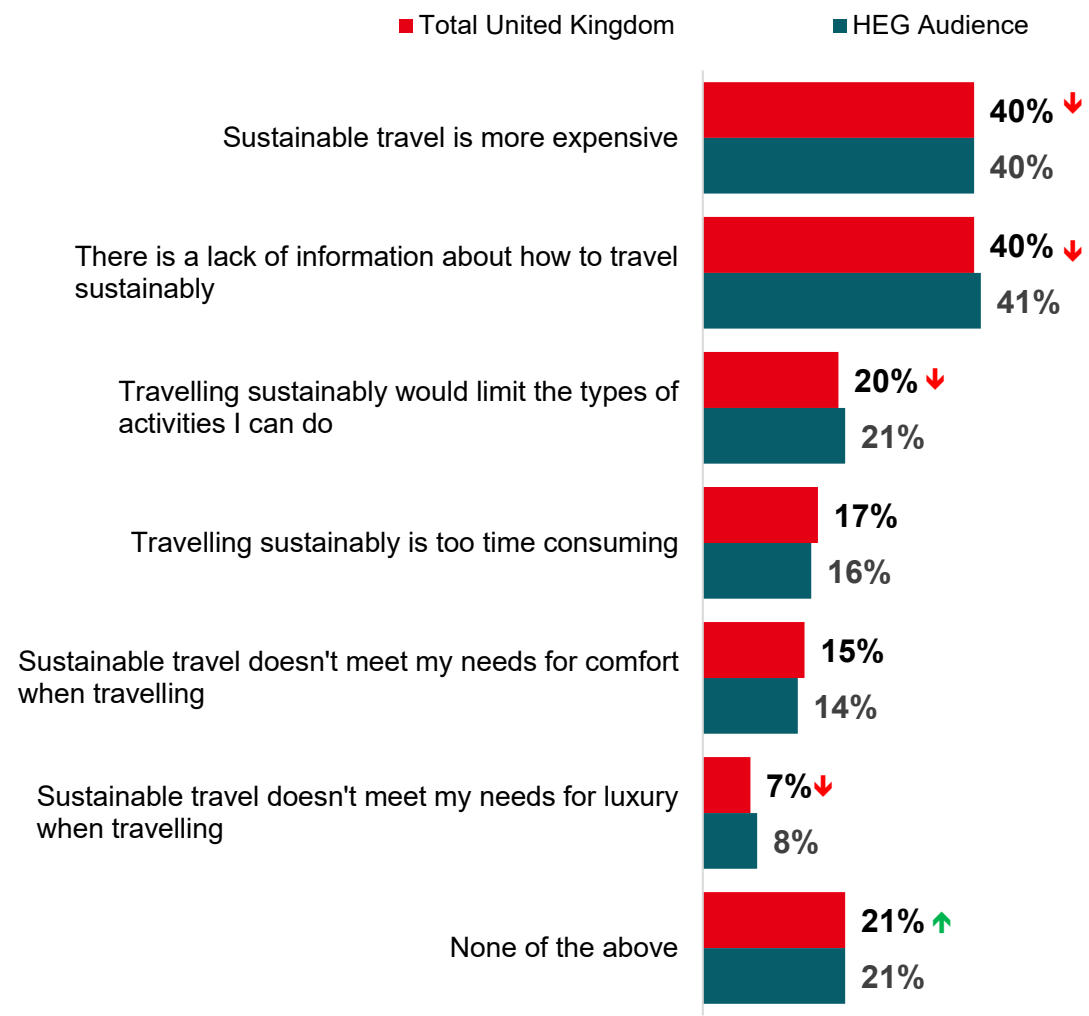
Key sustainability efforts across segments include knowing that the local culture is not negatively impacted by tourism, the conservation of natural areas and knowing that their money is directly supporting the local community. OEs are more likely to say conservation of natural areas are an important sustainability effort, and least likely to say dining options with local/organic ingredients.



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): Outdoor Explorers (n=323); Culture Seekers (n=276); Refined Globetrotters (n=354); Purpose Driven Families (n=86)  
D8. What are the top 3 sustainability efforts that are most important to you when selecting a holiday destination? Select up to three choices.

# BARRIERS TO SUSTAINABLE TRAVEL

*The main barriers to sustainable travel for both total UK travellers and HEGs are the perceived higher costs and the lack of information, although mentions of barriers overall have decreased compared to last year.*



**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”.

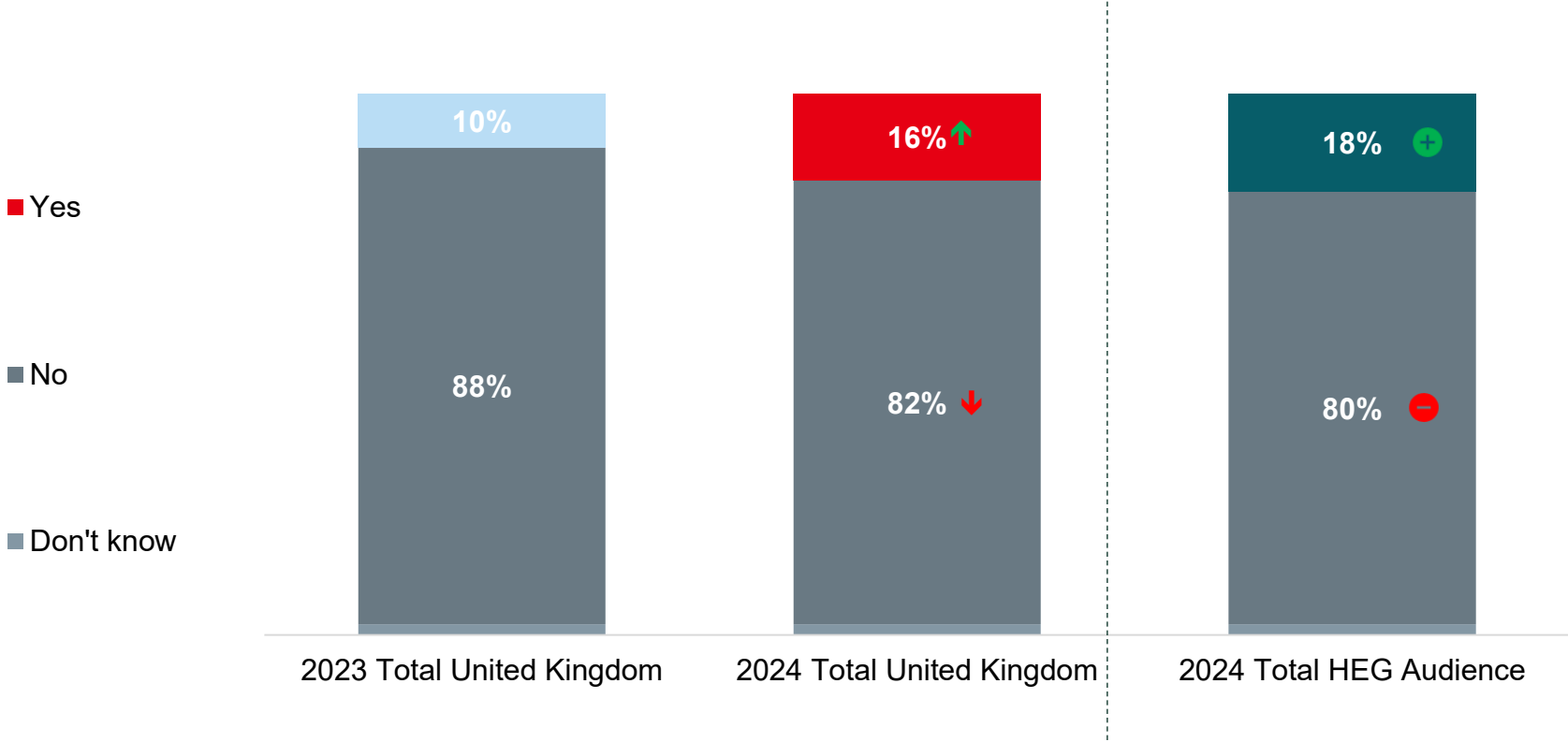
↑ / ↓ = significantly higher/lower result (2024 vs. 2023)  
+ / - = significantly higher/lower result (HEG vs. 2024 Total)

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=761); HEG (n=526)  
D9. Which of the following factors prevents you from choosing sustainable travel options? Select all that apply.



# USAGE OF AI TOOLS TO PLAN TRIPS

Usage of AI in trip planning has increased compared to last year, and is higher among HEGs.



↑ / ↓ = significantly higher/lower result (2024 vs. 2023)  
+ / - = significantly higher/lower result (HEG vs. 2024 Total)

Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=1516); HEG (n=1039)  
D14. Have you ever used an AI tool (e.g. ChatGPT or Bard) to research or plan a trip?

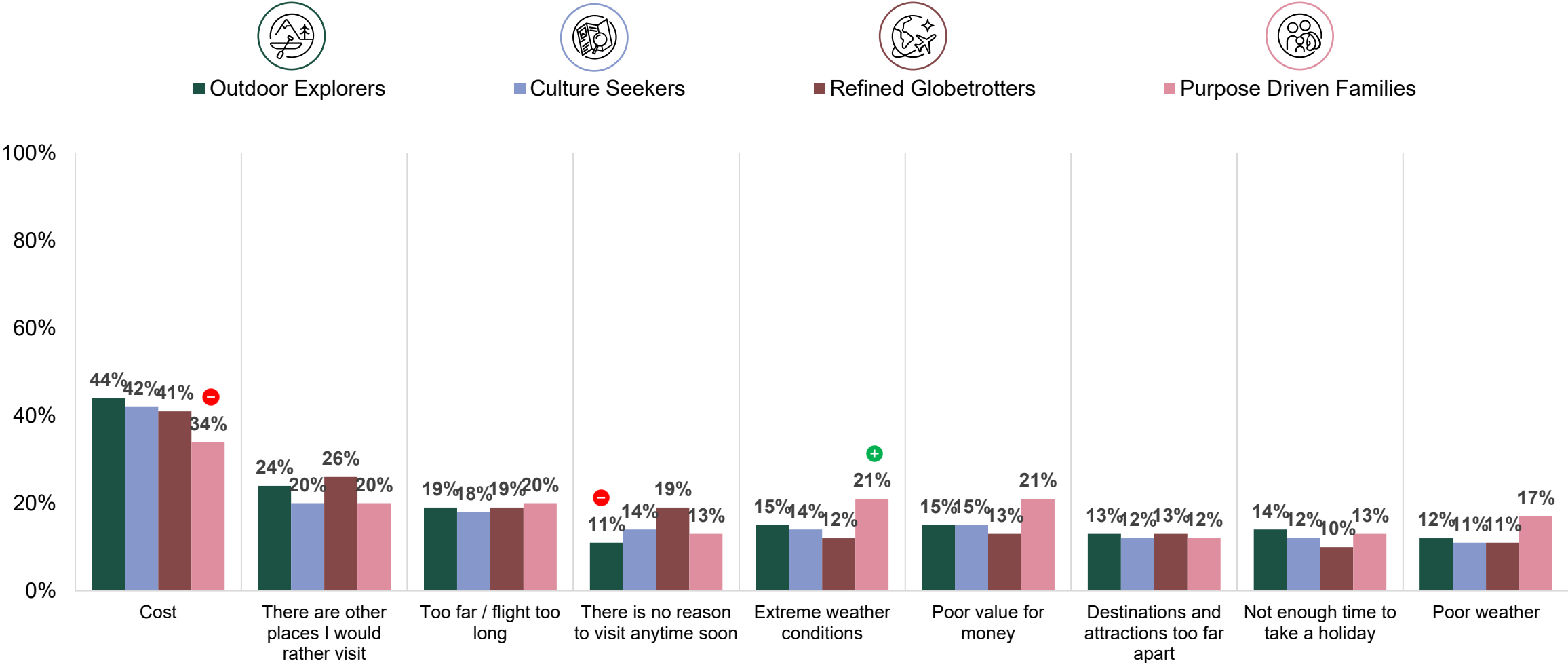
# CANADA TRAVEL BARRIERS AND MOTIVATORS



Summerside  
Prince Edward Island

# BARRIERS FOR TRAVEL TO CANADA (TOP 9): BY SEGMENTS

Among all segments, cost is the biggest barrier to travelling to Canada, but less so for PDFs, who are more likely to say weather is a barrier.



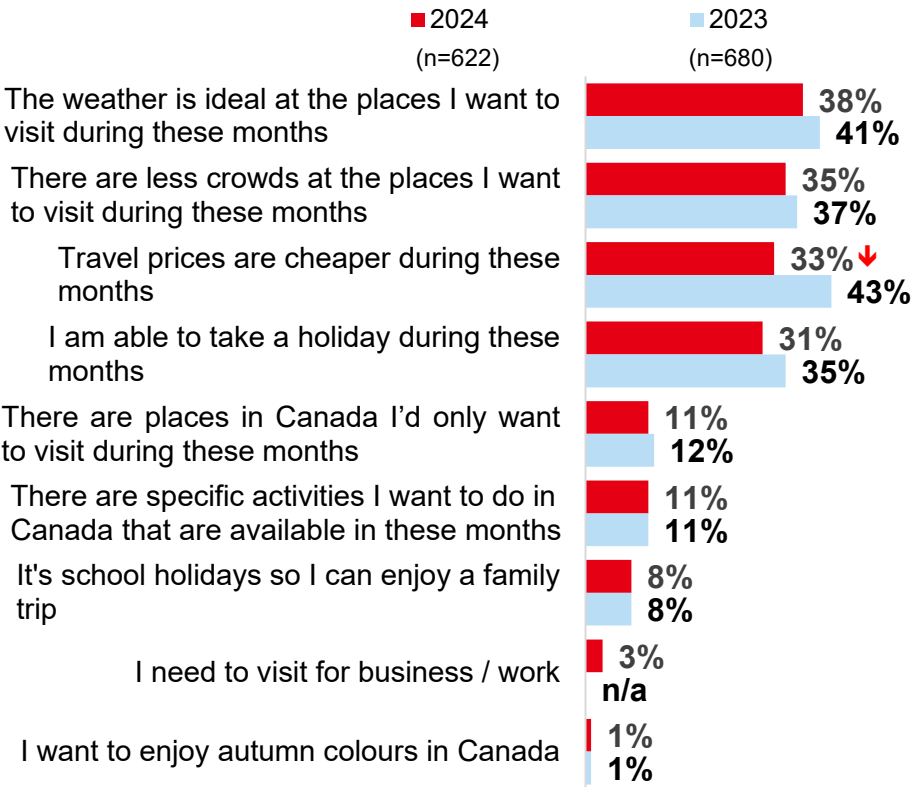
Base: Long-haul pleasure travellers (past 3 years or next 2 years) Outdoor Explorers (n=323); Culture Seekers (n=276); Refined Globetrotters (n=354); Purpose Driven Families (n=86)  
E5. Which of the following factors might discourage you from visiting Canada? (Select all that apply)

United Kingdom GTRP – December 2024  
+ / - = significantly higher/lower result (HEG vs. 2024 Total)

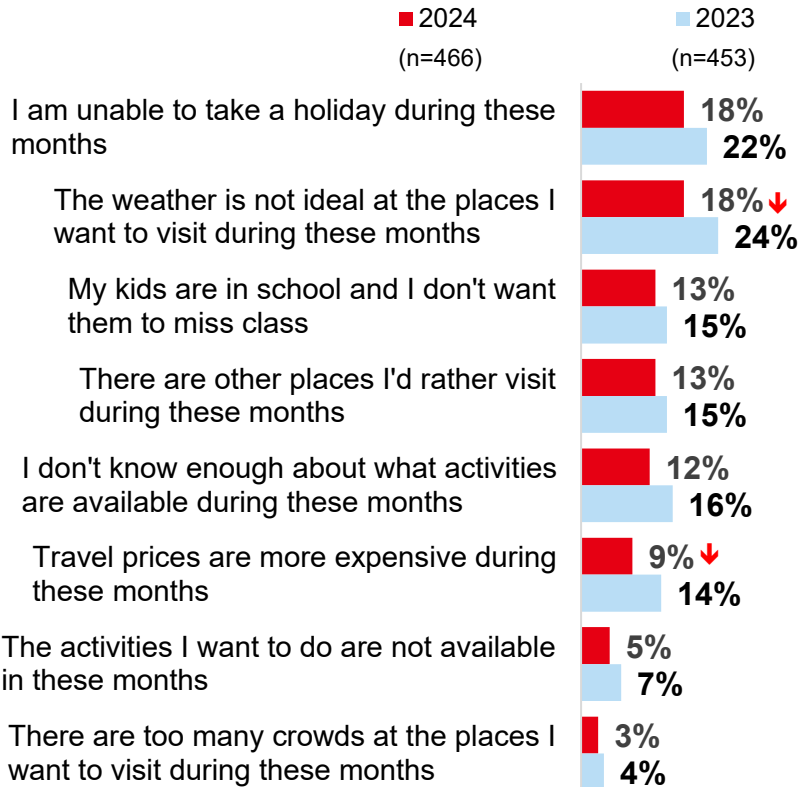
# MOTIVATORS & BARRIERS FOR FALL TRAVEL TO CANADA

*The weather being ideal and there being less crowds during these months are the top motivators for travelling to Canada in the Fall months. Of note, mentions of travel prices being cheaper have decreased compared to last year. That said, being unable to take a holiday during these months and not ideal weather are the main barriers to fall travel, although mentions for weather have also decreased compared to a year ago.*

Motivators for Fall Travel



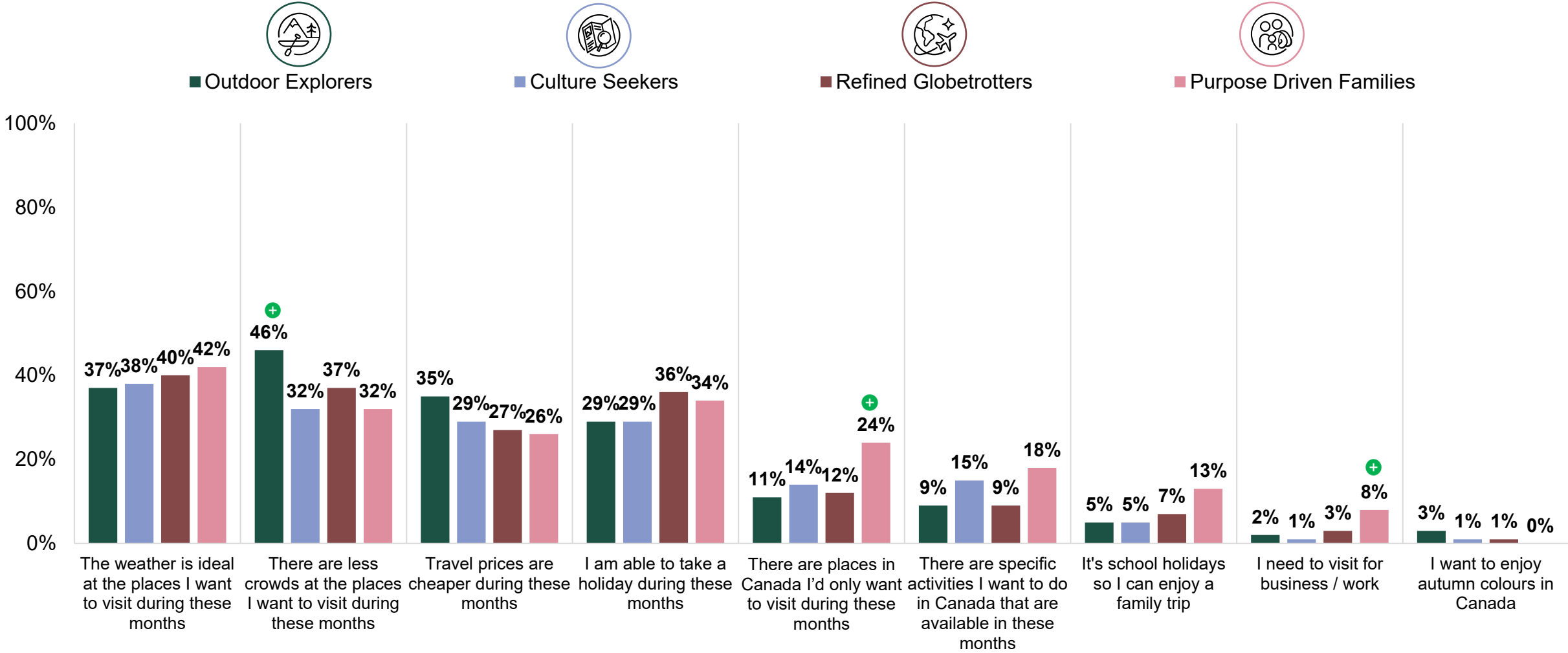
Barriers for Fall Travel



Base: Those in the dream to purchase stages of the path to purchase for Canada and considering visiting Canada or any province/territory in September, October or November  
E6a. You indicated earlier that you are considering taking a holiday to **Canada** during the months of September, October and/or November... Which of the following describes why you would be interested in travelling to Canada for a holiday during these **autumn months**?  
Base: Those in the dream to purchase stages of the path to purchase for Canada and not considering visiting Canada or any province/territory in September, October or November  
E7. You indicated earlier that you are not considering taking a holiday to **Canada** during the months of September, October and/or November... Which of the following describes why you would **not** be interested in travelling to Canada for a holiday during these **autumn months**?

# MOTIVATORS FOR FALL TRAVEL TO CANADA: BY SEGMENTS

*Ideal weather is a key motivator for Fall travel among all segments, although OEs place a greater importance on there being less crowds during these months for wanting to visit Canada in the Fall.*

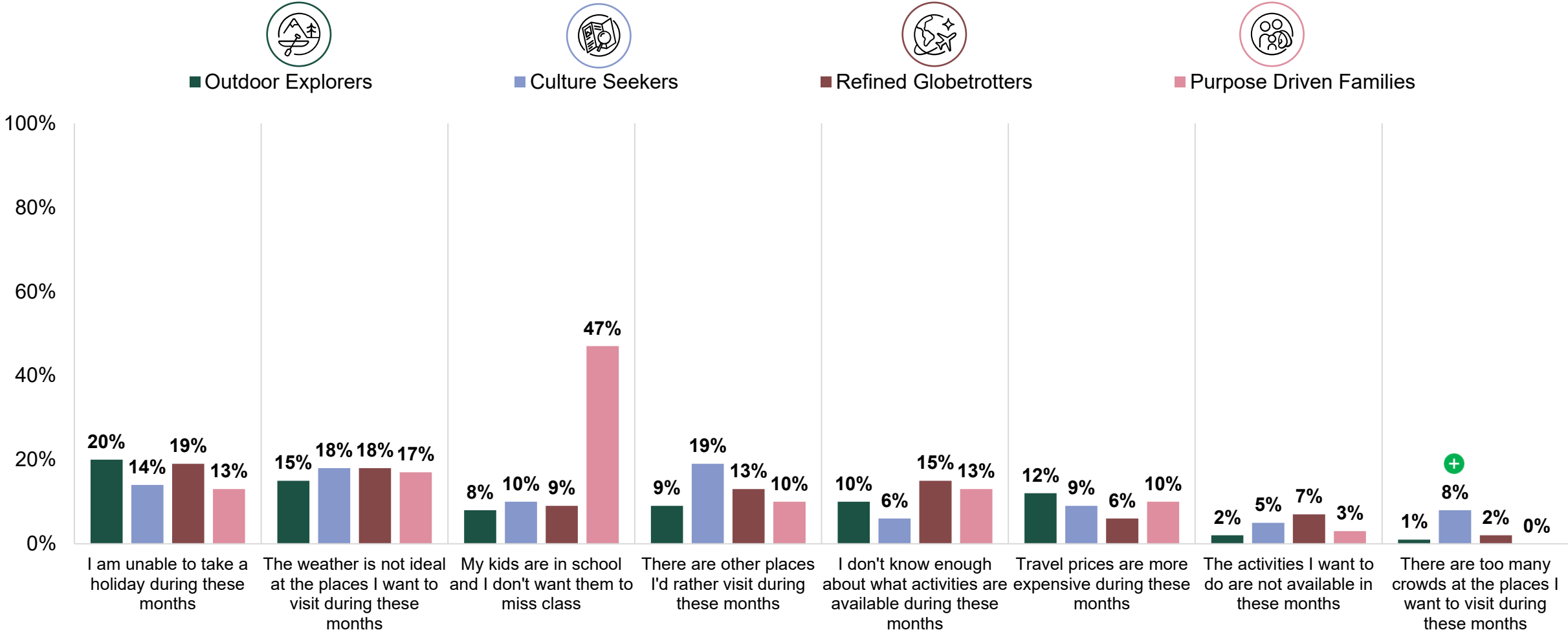


Base: Those in the dream to purchase stages of the path to purchase for Canada and considering visiting Canada or any province/territory in September, October or November: Outdoor Explorers (n=147); Culture Seekers (n=123); Refined Globetrotters (n=148); Purpose Driven Families (n=38\*)  
E6a. You indicated earlier that you are considering taking a holiday to **Canada** during the months of September, October and/or November... Which of the following describes why you would be interested in travelling to Canada for a holiday during these autumn months?  
\*Small base size, interpret with caution (n<50)



# BARRIERS FOR FALL TRAVEL TO CANADA: BY SEGMENTS

Being unable to take a holiday and the weather are the top barriers for most segments except Purpose Driven Families, where their kids being in school is the main deterrent.



Base: Those in the dream to purchase stages of the path to purchase for Canada and not considering visiting Canada or any province/territory in September, October or November: Outdoor Explorers (n=99); Culture Seekers (n=78); Refined Globetrotters (n=103); Purpose Driven Families (n=30\*) E7. You indicated earlier that you are not considering taking a holiday to **Canada** during the months of September, October and/or November... Which of the following describes why you would **not** be interested in travelling to Canada for a holiday during these **autumn months**?  
\*Small base size, interpret with caution (n<50)

# MOTIVATORS & BARRIERS FOR WINTER TRAVEL TO CANADA

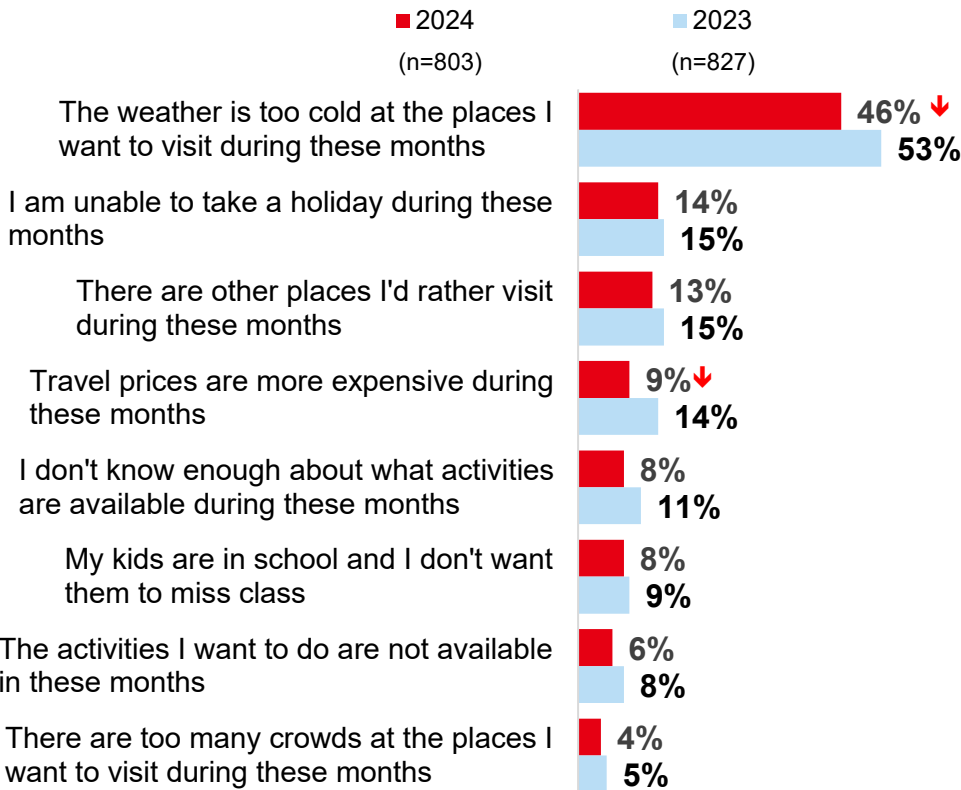


*Although the cold weather remains the biggest deterrent to travelling to Canada in the Winter months, this has lessened compared to a year ago, along with travel being perceived as more expensive. That said, ideal weather, along with being able to take a holiday are the biggest motivators for winter travel.*

## Motivators for Winter Travel



## Barriers for Winter Travel

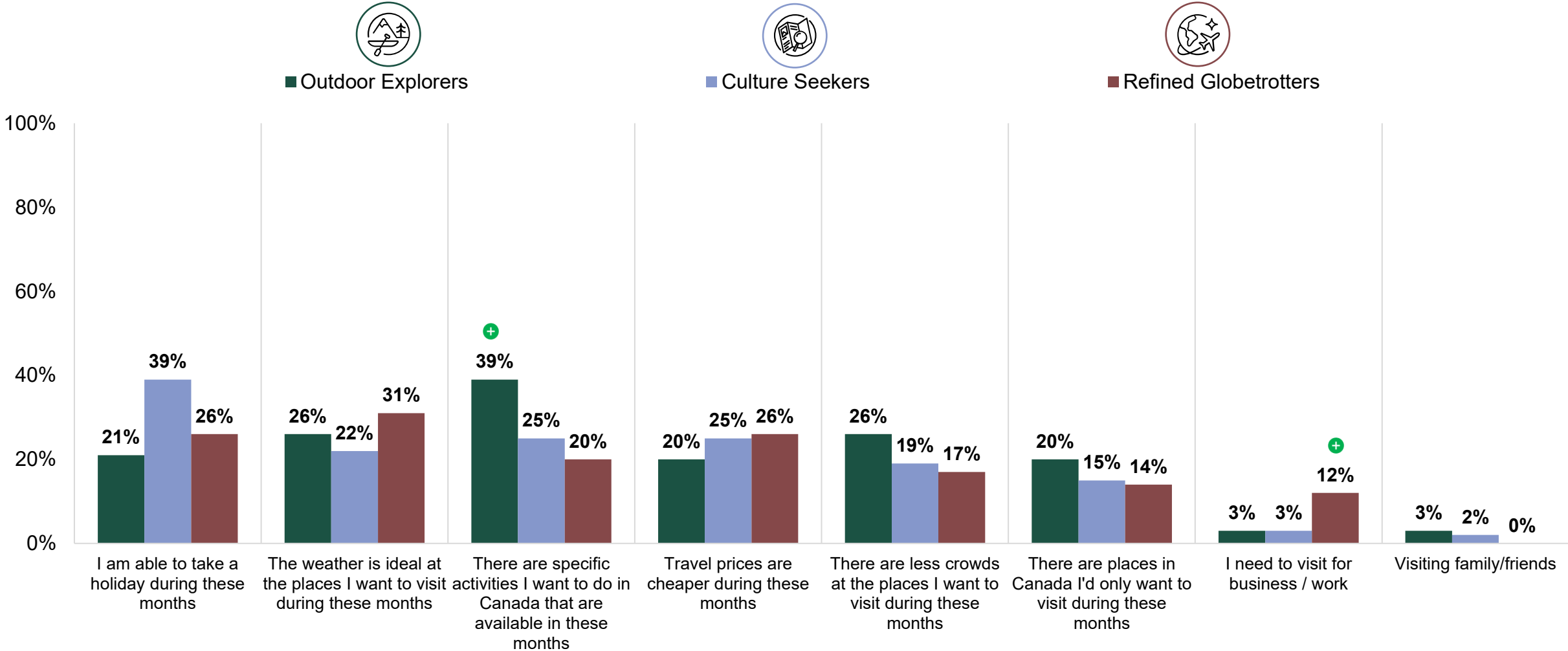


Base: Those in the dream to purchase stages of the path to purchase for Canada and considering visiting Canada or any province/territory in December, January or February E8a. You indicated earlier that you are considering taking a holiday to **Canada** during the months of December, January and/or February... Which of the following describes why you would be interested in travelling to Canada for a holiday during these **winter months**?  
Base: Those in the dream to purchase stages of the path to purchase for Canada and not considering visiting Canada or any province/territory in December, January or February E9. You indicated earlier that you are not considering taking a holiday to **Canada** during the months of December, January and/or February... Which of the following describes why you would **not** be interested in travelling to Canada for a holiday during these **winter months**?  
\*Small base size, interpret with caution (n<50)



# MOTIVATORS FOR WINTER TRAVEL TO CANADA: BY SEGMENTS

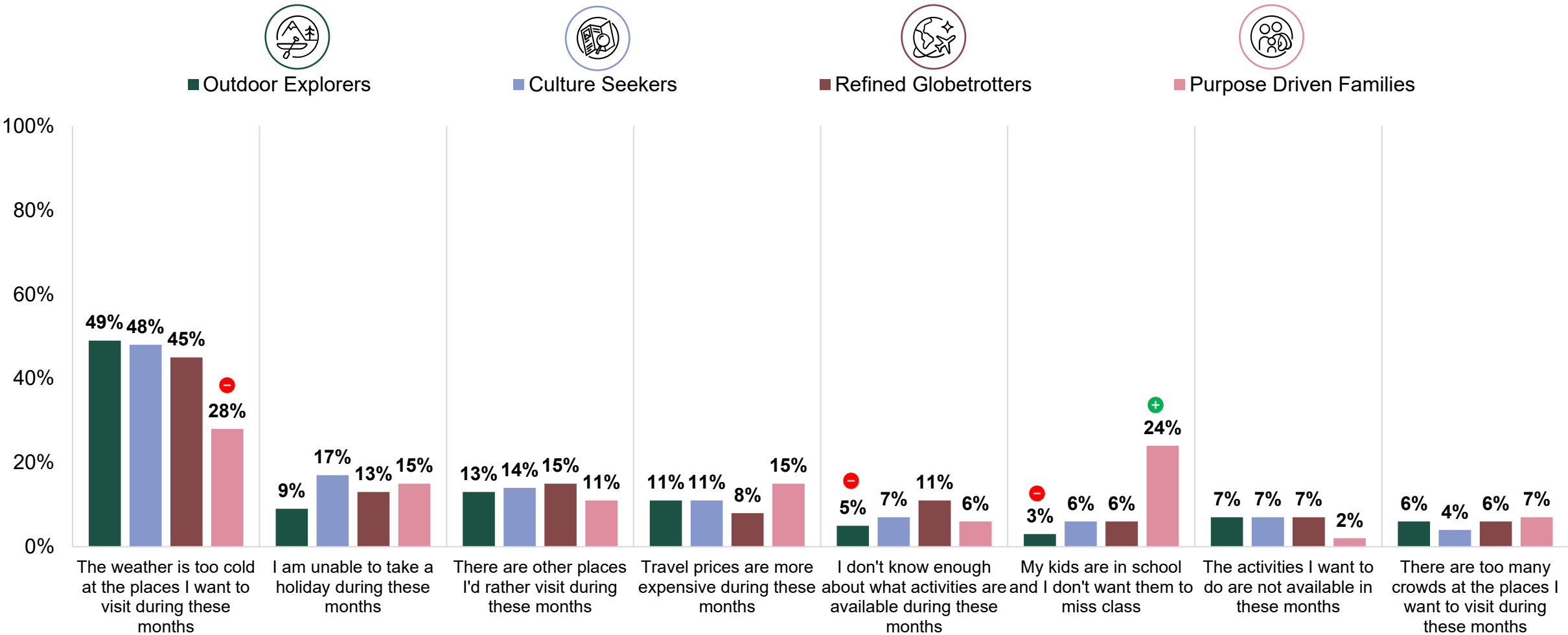
The weather being ideal is the biggest motivator for RGs, while OEs are more likely to travel to Canada for specific activities they want to do during those months.



Purpose Driven Families base size too small to report (n=22\*\*)  
Base: Those in the dream to purchase stages of the path to purchase for Canada and considering visiting Canada or any province/territory in December, January or February: Outdoor Explorers (n=76); Culture Seekers (n=59); Refined Globetrotters (n=65); Purpose Driven Families (n=22)  
E8a. You indicated earlier that you are considering taking a holiday to Canada during the months of December, January and/or February... Which of the following describes why you would be interested in travelling to Canada for a holiday during these winter months?  
\*Small base size, interpret with caution (n<50)

# BARRIERS FOR WINTER TRAVEL TO CANADA: BY SEGMENTS

The weather being too cold is the top barrier among all segments.



Base: Those in the dream to purchase stages of the path to purchase for Canada and not considering visiting Canada or any province/territory in December, January or February:  
Outdoor Explorers (n=170); Culture Seekers (n=142); Refined Globetrotters (n=186); Purpose Driven Families (n=46\*)  
E9. You indicated earlier that you are not considering taking a holiday to **Canada** during the months of December, January and/or February... Which of the following describes why you would **not** be interested in travelling to Canada for a holiday during these **winter months**?  
\*Small base size, interpret with caution (n<50)

United Kingdom GTRP – December 2024

+ / - = significantly higher/lower result (HEG vs. 2024 Total)

54

# MOST RECENT TRIP



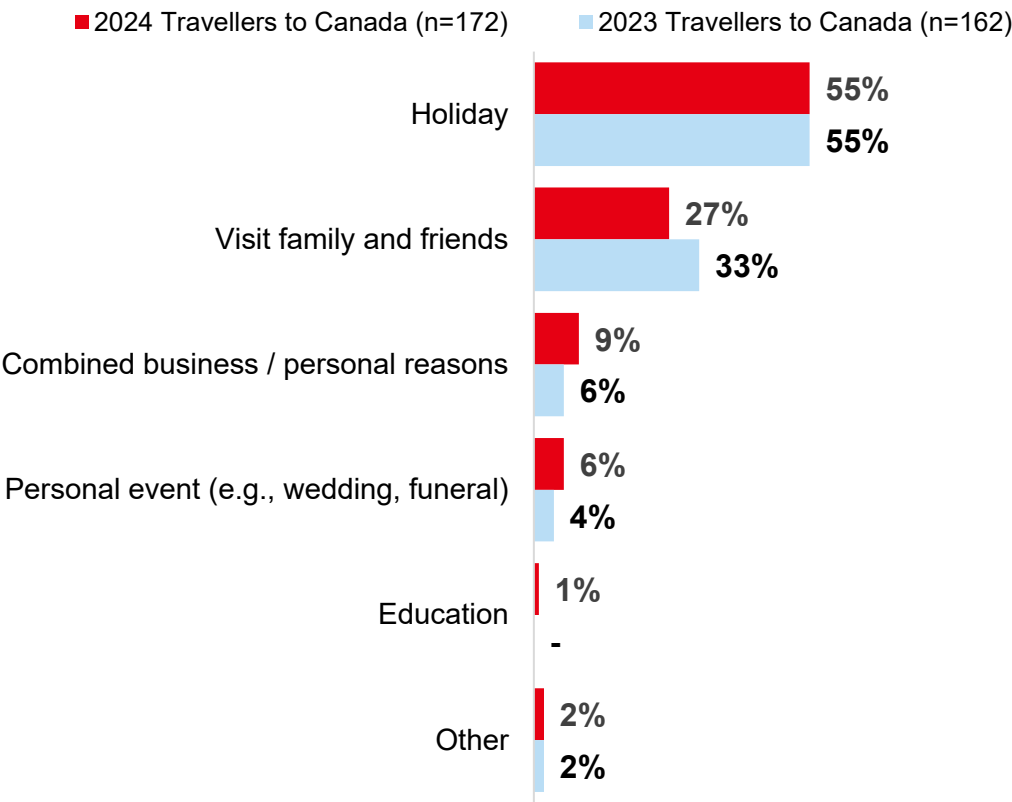
Le Pays de la Sagouine  
New Brunswick



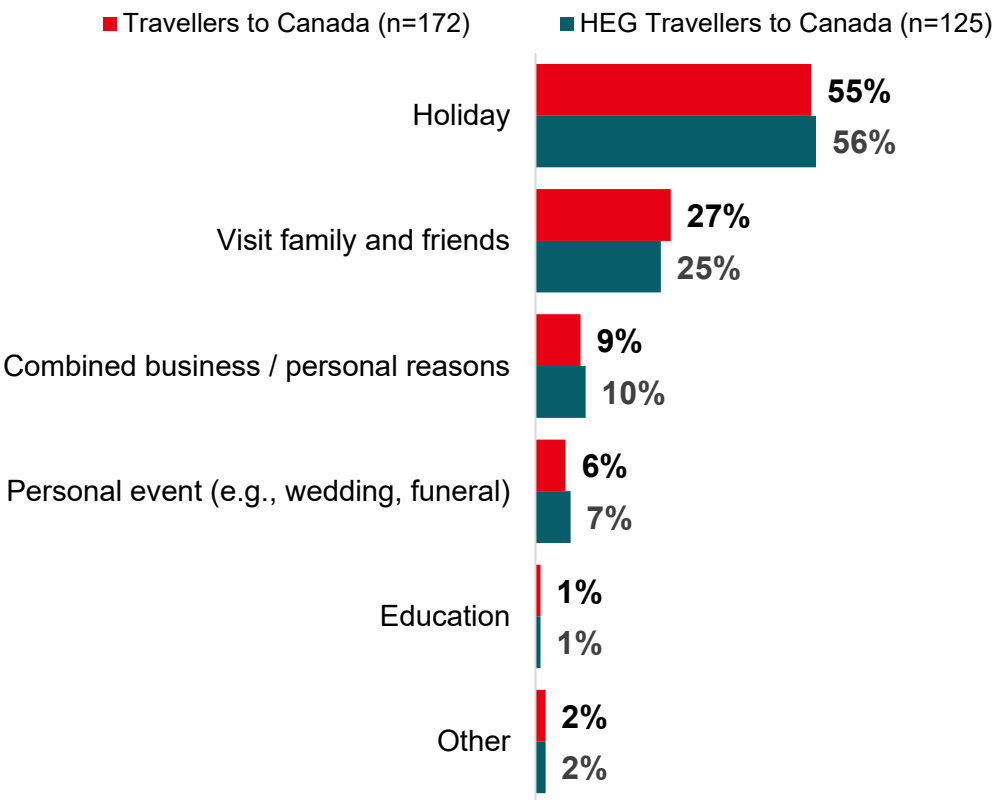
# MAIN PURPOSE OF RECENT TRIP

Over one-half of UK travellers to Canada went for a holiday, on par with last year and similar among HEGs.

Total Travellers to Canada: Trended



Total Travellers to Canada vs. HEG Travellers to Canada

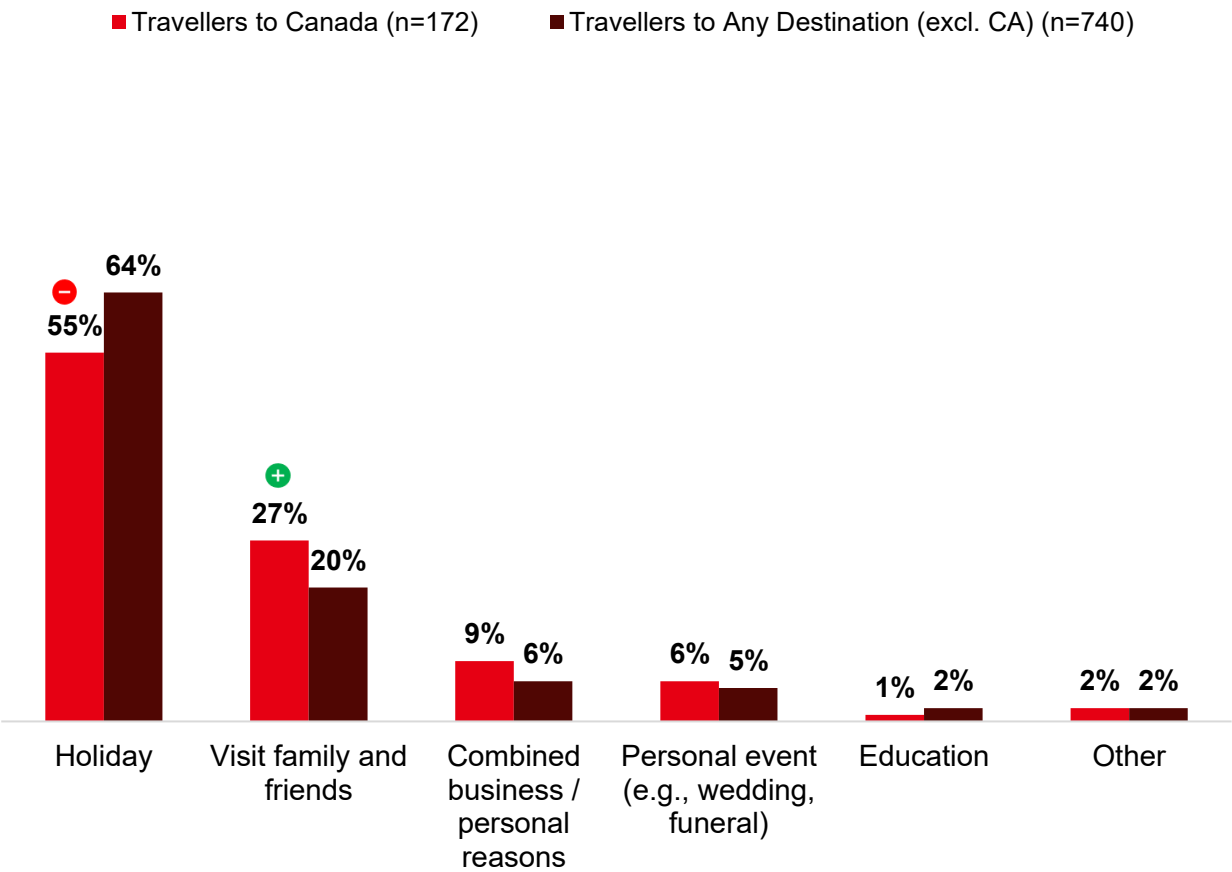


↑ / ↓ = significantly higher/lower result (2024 vs. 2023)  
+ / - = significantly higher/lower result (HEG vs. 2024 Total)

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


# MAIN PURPOSE OF RECENT TRIP: BY DESTINATION

*Travellers to Canada were less likely to visit for a holiday compared to travellers to other destinations, but more likely to visit family and friends.*



+ / - = significantly higher/lower result (Travellers to Canada vs. Any Destination (excl. CA))  
 Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to any destination past 3 years  
 F2. What was the main purpose of this trip? (Select one)

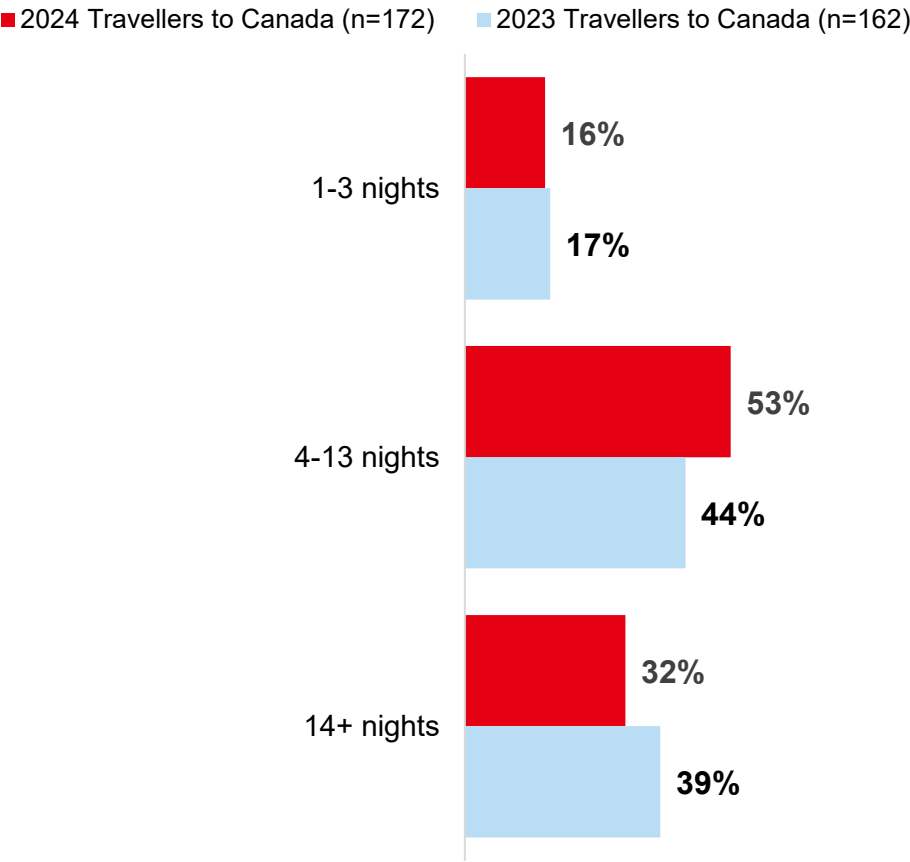


 Nahanni National Park Reserves  
 Northwest Territories

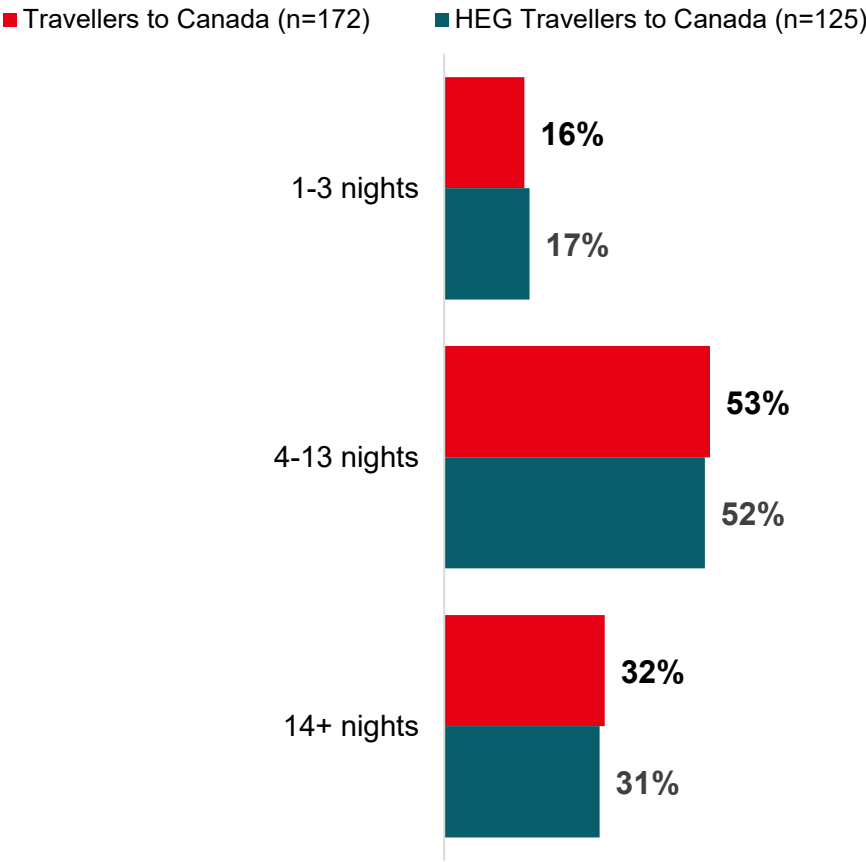
# NIGHTS SPENT DURING RECENT TRIP

Over one-half of travellers to Canada spent 4-13 nights during their trip, similar among HEGs. This is consistent with the previous year.

Total Travellers to Canada: Trended



Total Travellers to Canada vs. HEG Travellers to Canada



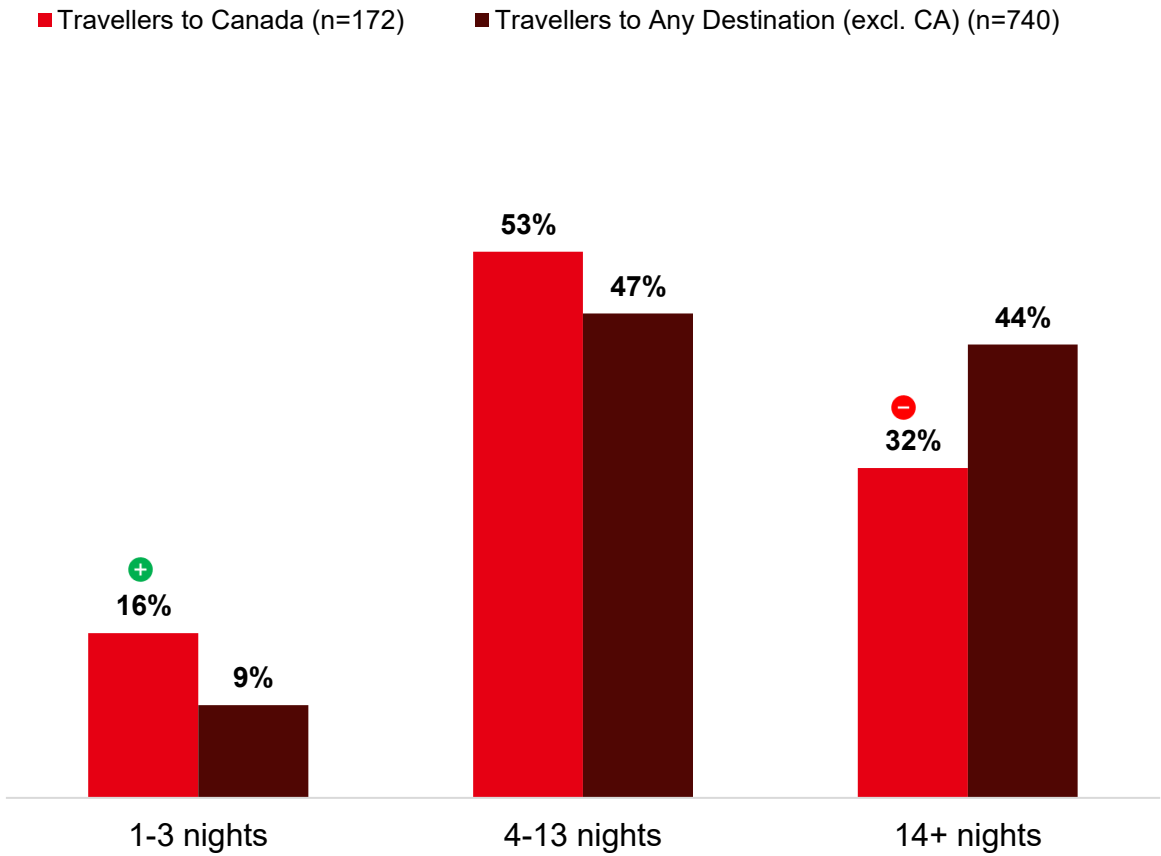
↑ / ↓ = significantly higher/lower result (2024 vs. 2023)  
+ / - = significantly higher/lower result (HEG vs. 2024 Total)

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



# NIGHTS SPENT DURING RECENT TRIP: BY DESTINATION

*Trips to Canada were shorter than trips to other destinations.*



**+** / **-** = significantly higher/lower result (Travellers to Canada vs. Any Destination (excl. CA))

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



 **Barren Canyon, Algonquin Park**  
 Ontario

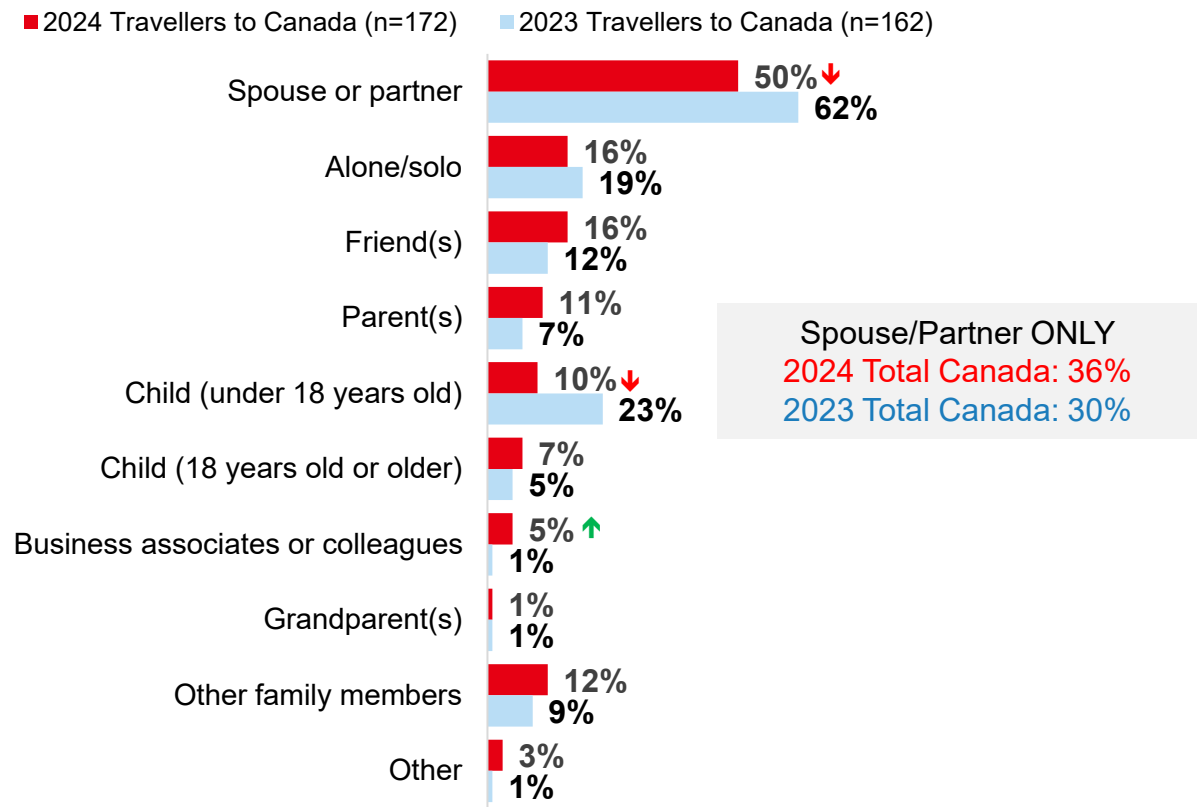
United Kingdom GTRP –  
 December 2024



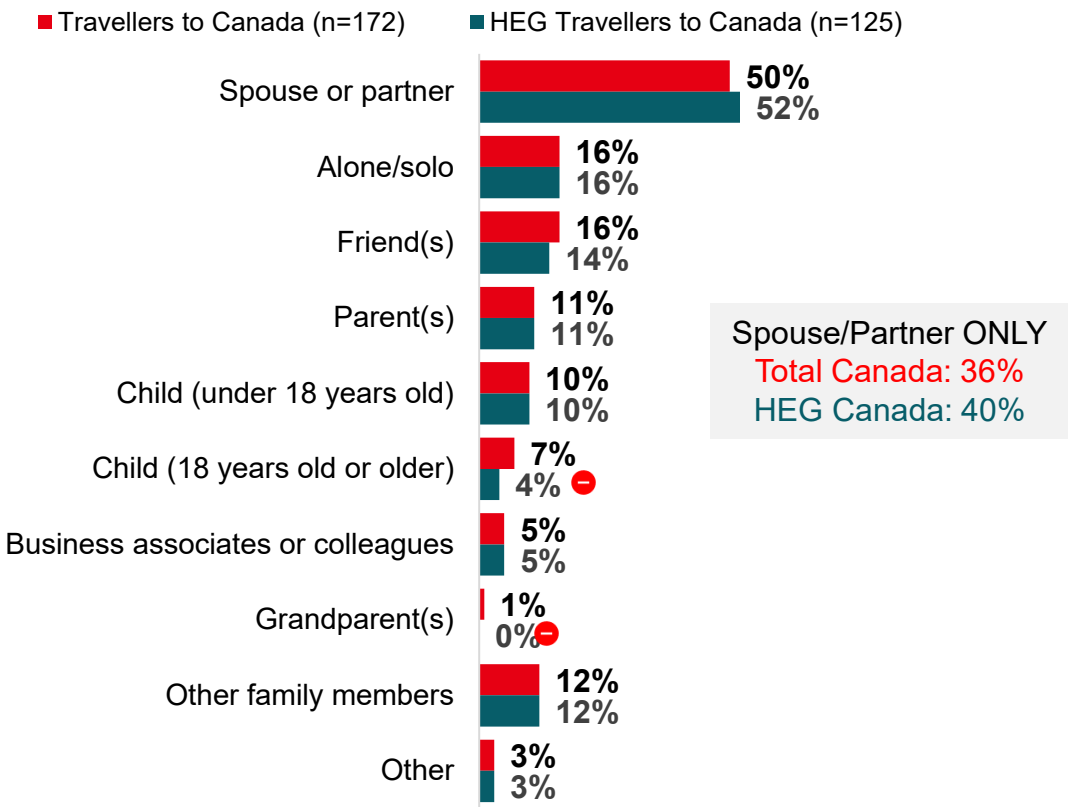
# TRAVEL PARTY OF RECENT TRIP

There was a drop in the number travelling to Canada with their spouse or partner or children under 18. However, those travelling with a business associate or colleague increased compared to last year.

Total Travellers to Canada: Trended



Total Travellers to Canada vs.  
HEG Travellers to Canada



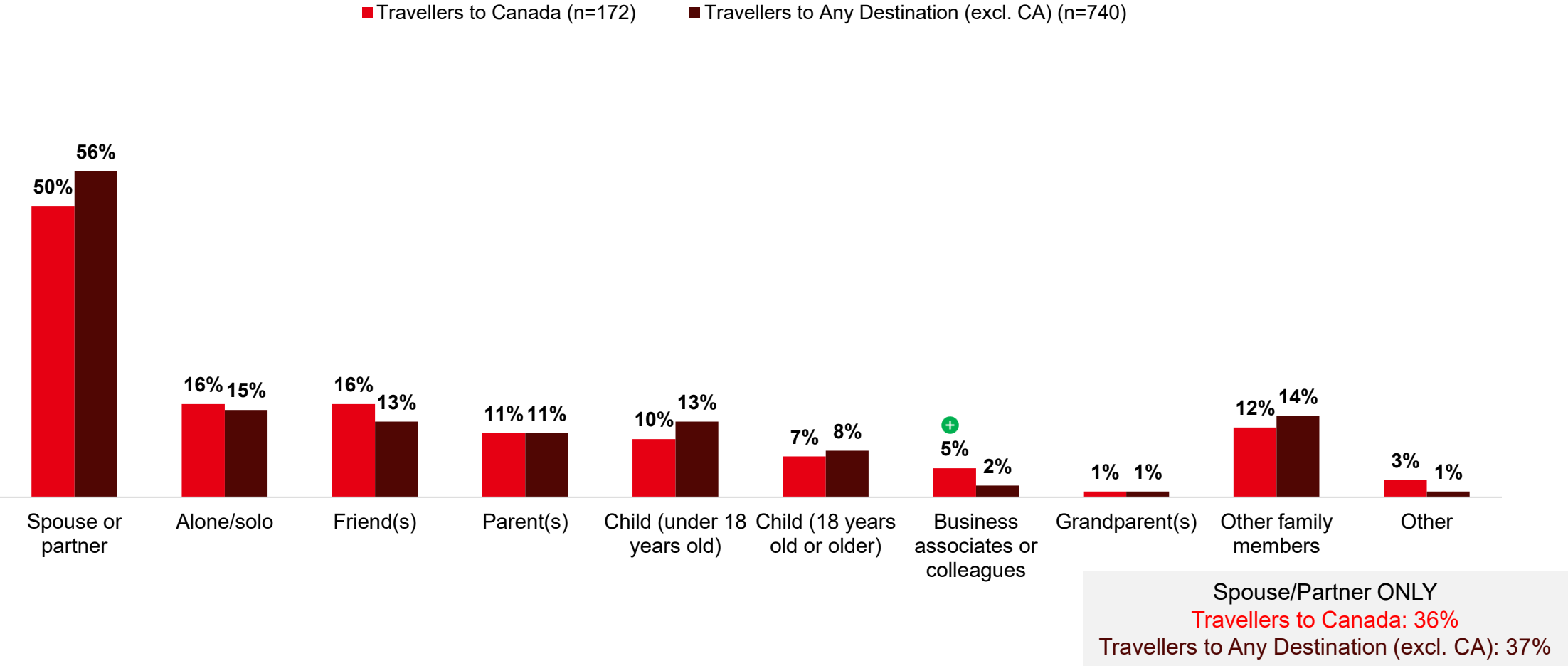
↑ / ↓ = significantly higher/lower result (2024 vs. 2023)  
+ / - = significantly higher/lower result (HEG vs. 2024 Total)

Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to any destination past 3 years  
F5. With whom did you travel on this trip? (Select all that apply)



# TRAVEL PARTY OF RECENT TRIP: BY DESTINATION

At least one-half travelled with their spouse/partner regardless of destination.



+ / - = significantly higher/lower result (Travellers to Canada vs. Any Destination (excl. CA))  
Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to any destination past 3 years  
F5. With whom did you travel on this trip? (Select all that apply)

# TRAVEL AGENTS/TOUR OPERATOR USAGE FOR RECENT TRIP

Usage of travel agents or tour operators remained consistent with last year. However, among those using travel agents and tour operators, usage to research flights increased, while usage to book ground transportation decreased.

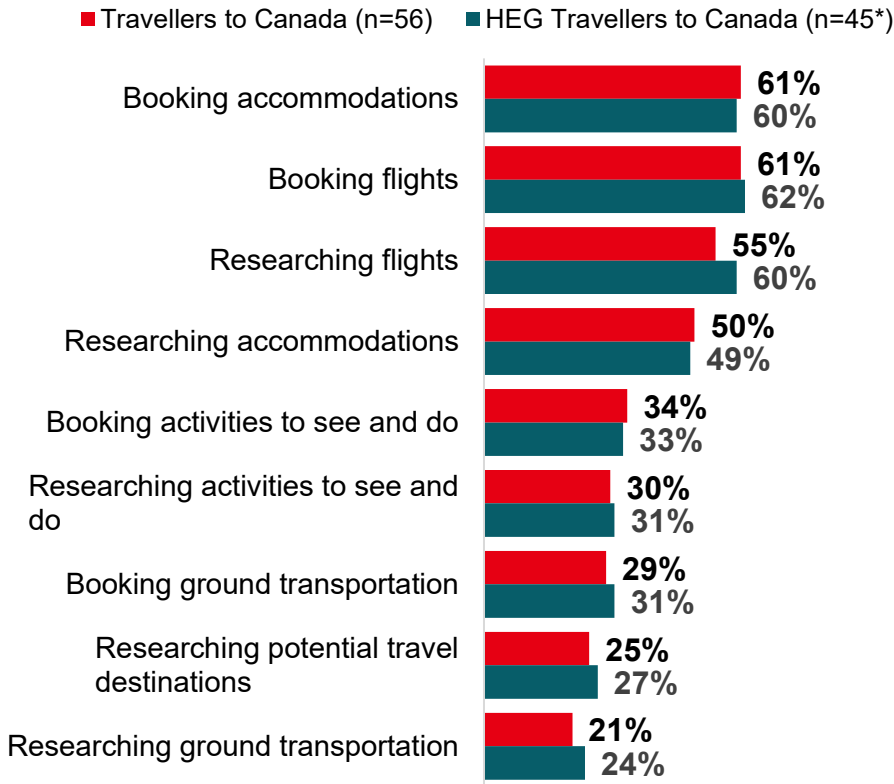
% Used a travel agent  
2024 Total Canada: 33%  
2023 Total Canada: 26%

Total Travellers to Canada: Trended  
Among those who used a travel agent/tour operator



% Used a travel agent  
Total Canada: 33%  
HEG Canada: 36%

Total Travellers to Canada vs. HEG Travellers to Canada  
Among those who used a travel agent/tour operator



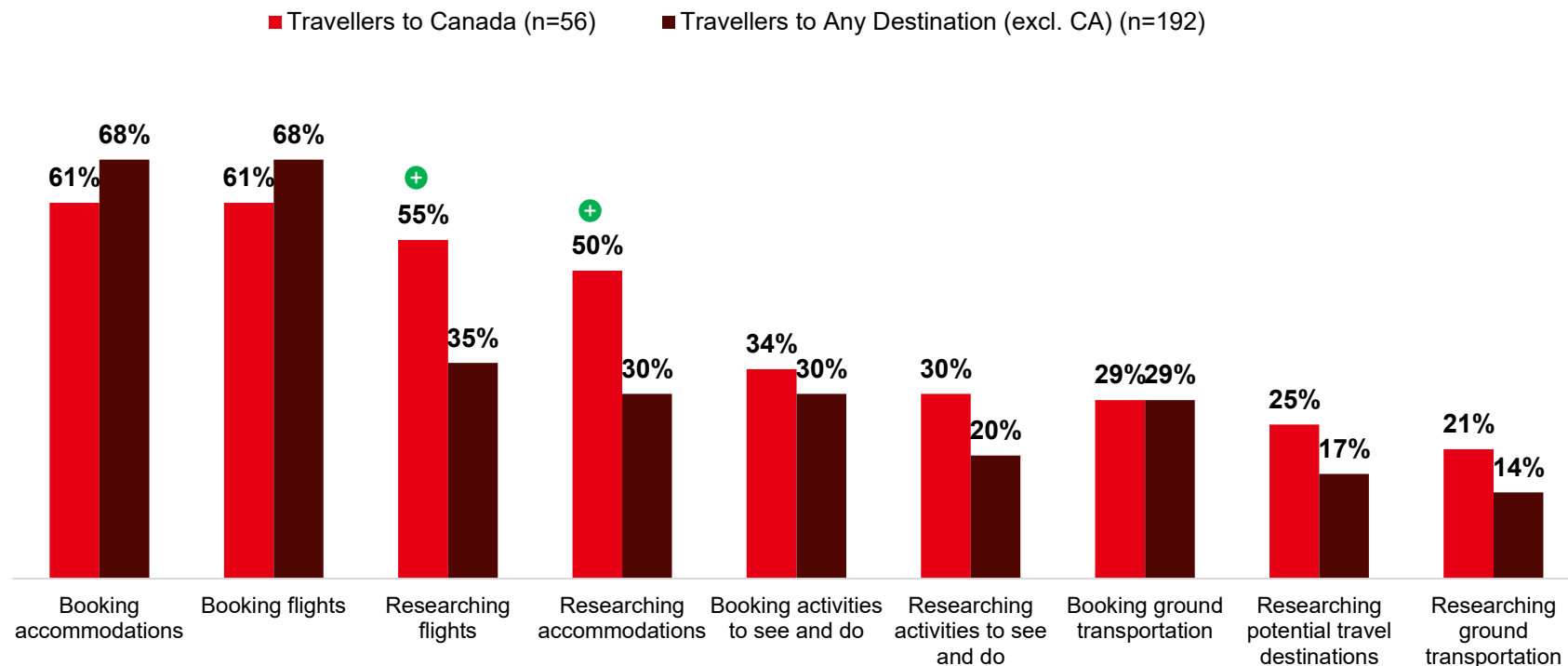
Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to any destination past 3 years  
F9. Travel agents offer personalized service to help individuals, groups, and business travellers plan and organize their travel schedules, from purchasing tour packages to booking flights 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)  
Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to any destination past 3 years, Used a Travel Agent/Tour Operator  
F10. Which of the following did a travel agent or tour operator help you with?  
\*Small base size, interpret with caution (n<50)

↑ / ↓ = significantly higher/lower result (2024 vs. 2023)  
+ / - = significantly higher/lower result (HEG vs. 2024 Total)

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

*Travellers to Canada were more likely to use a travel agent or tour operator to help research flights or accommodations.*

% Used a travel agent  
**Travellers to Canada: 33%**  
 Travellers to Any Destination (excl. CA): 26%



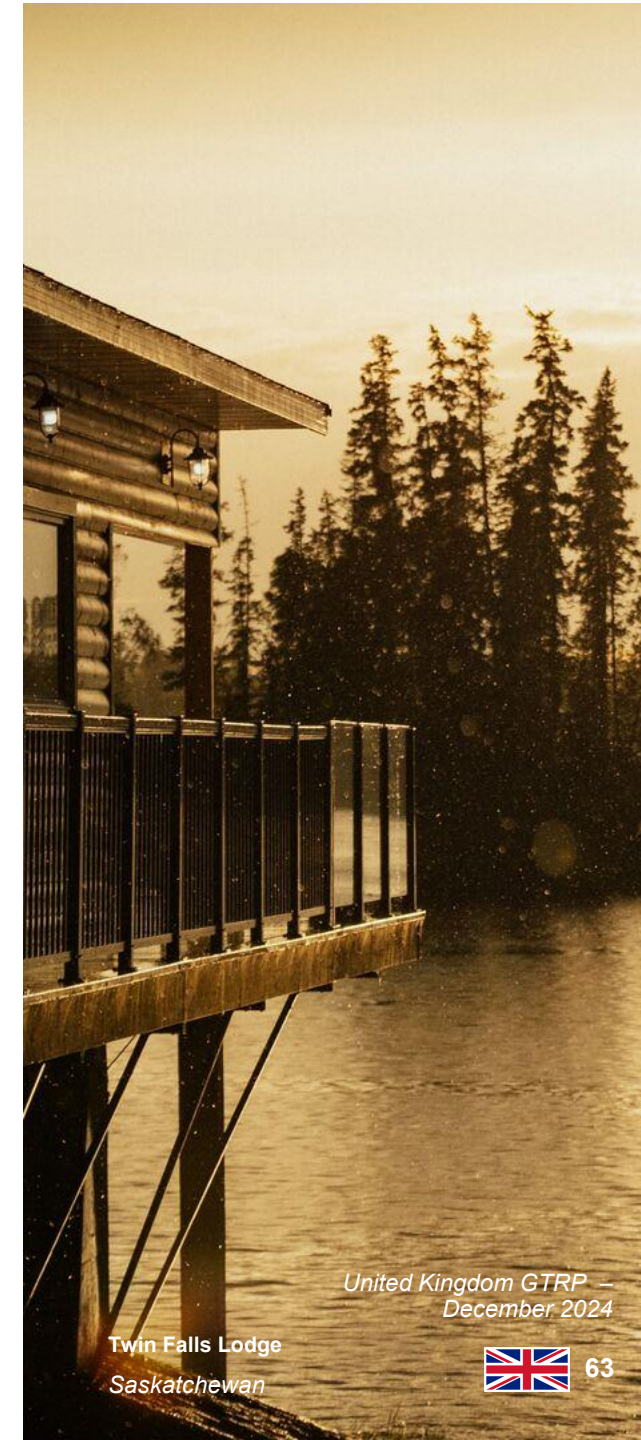
+ / - = significantly higher/lower result (Travellers to Canada vs. Any Destination (excl. CA))

Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to any destination past 3 years

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)

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

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



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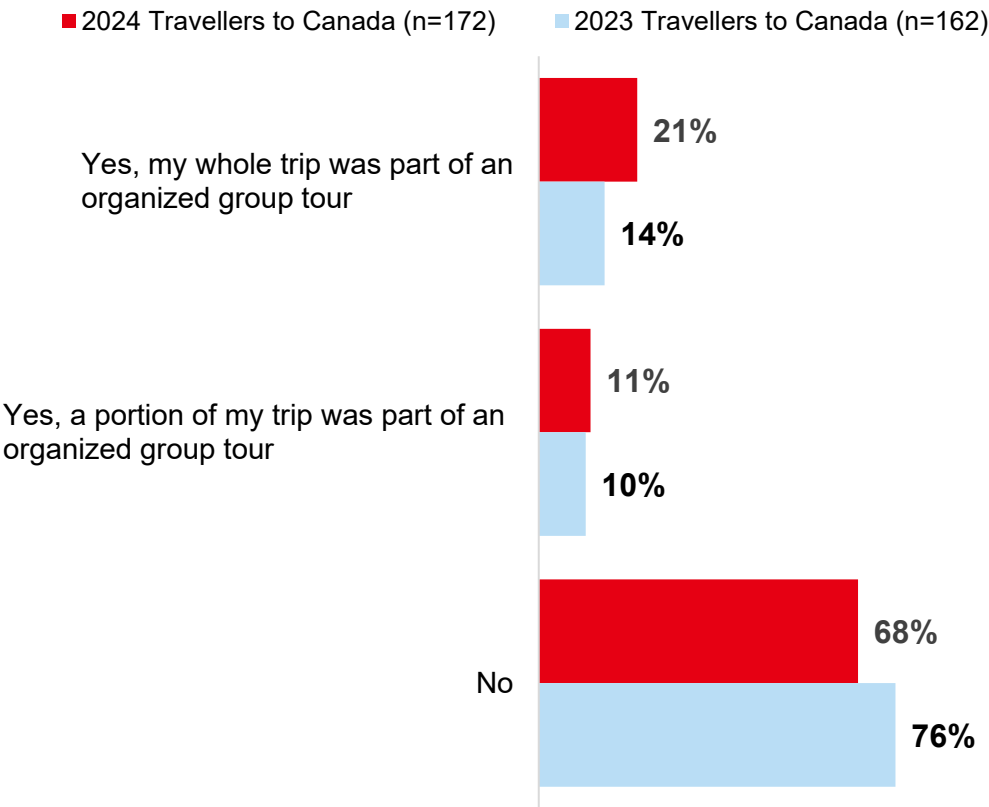
Twin Falls Lodge  
Saskatchewan



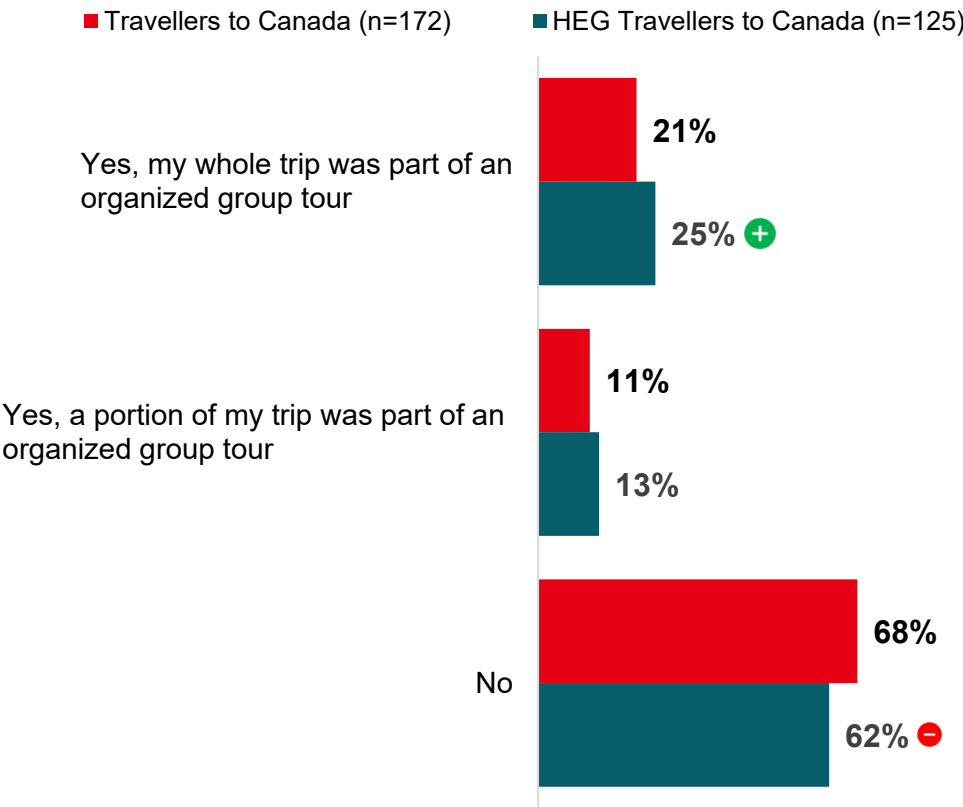
# ORGANIZED GROUP TOUR USAGE FOR RECENT TRIP

Usage of an organized group tour remained consistent with last year for travellers to Canada, with HEGs more likely to use an organized group tour for their entire trip.

Total Travellers to Canada: Trended



Total Travellers to Canada vs. HEG Travellers to Canada



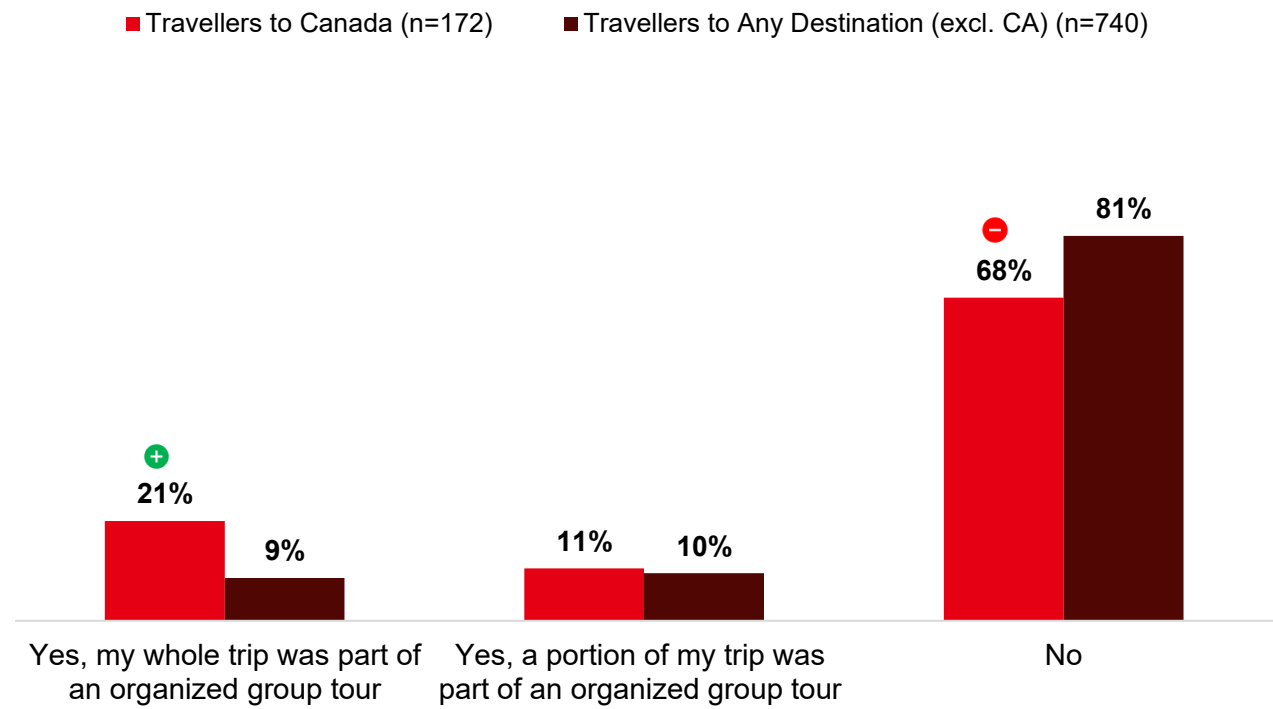
↑ / ↓ = significantly higher/lower result (2024 vs. 2023)  
+ / - = significantly higher/lower result (HEG vs. 2024 Total)

Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to any destination past 3 years  
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?



# ORGANIZED GROUP TOUR FOR RECENT TRIP: BY DESTINATION

*While travellers to Canada were more likely than travellers to other destinations to use an organized group tour for their most recent trip, the vast majority did not use them.*



+ / - = significantly higher/lower result (Travellers to Canada vs. Any Destination (excl. CA))

Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to any destination past 3 years 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?





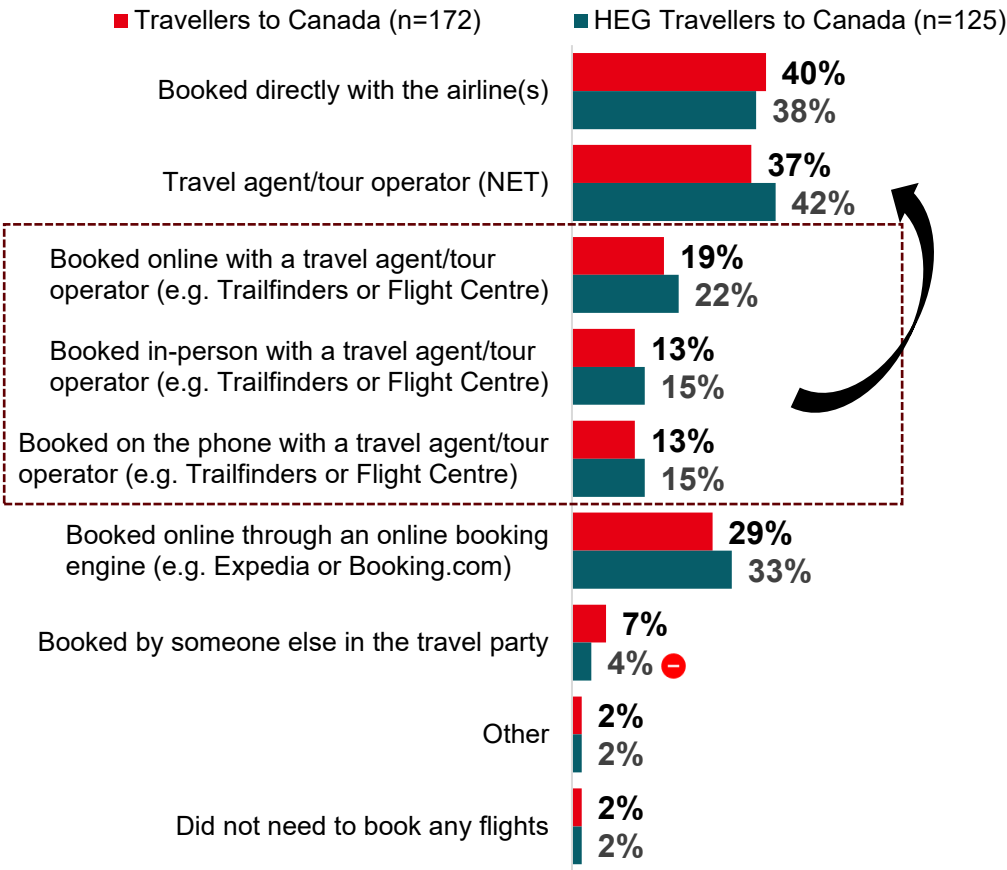
# BOOKING FLIGHTS FOR RECENT TRIP

Booking directly with the airline or using a travel agent or tour operator are the most popular choices for booking flights, consistent with last year.

Total Travellers to Canada: Trended



Total Travellers to Canada vs. HEG Travellers to Canada

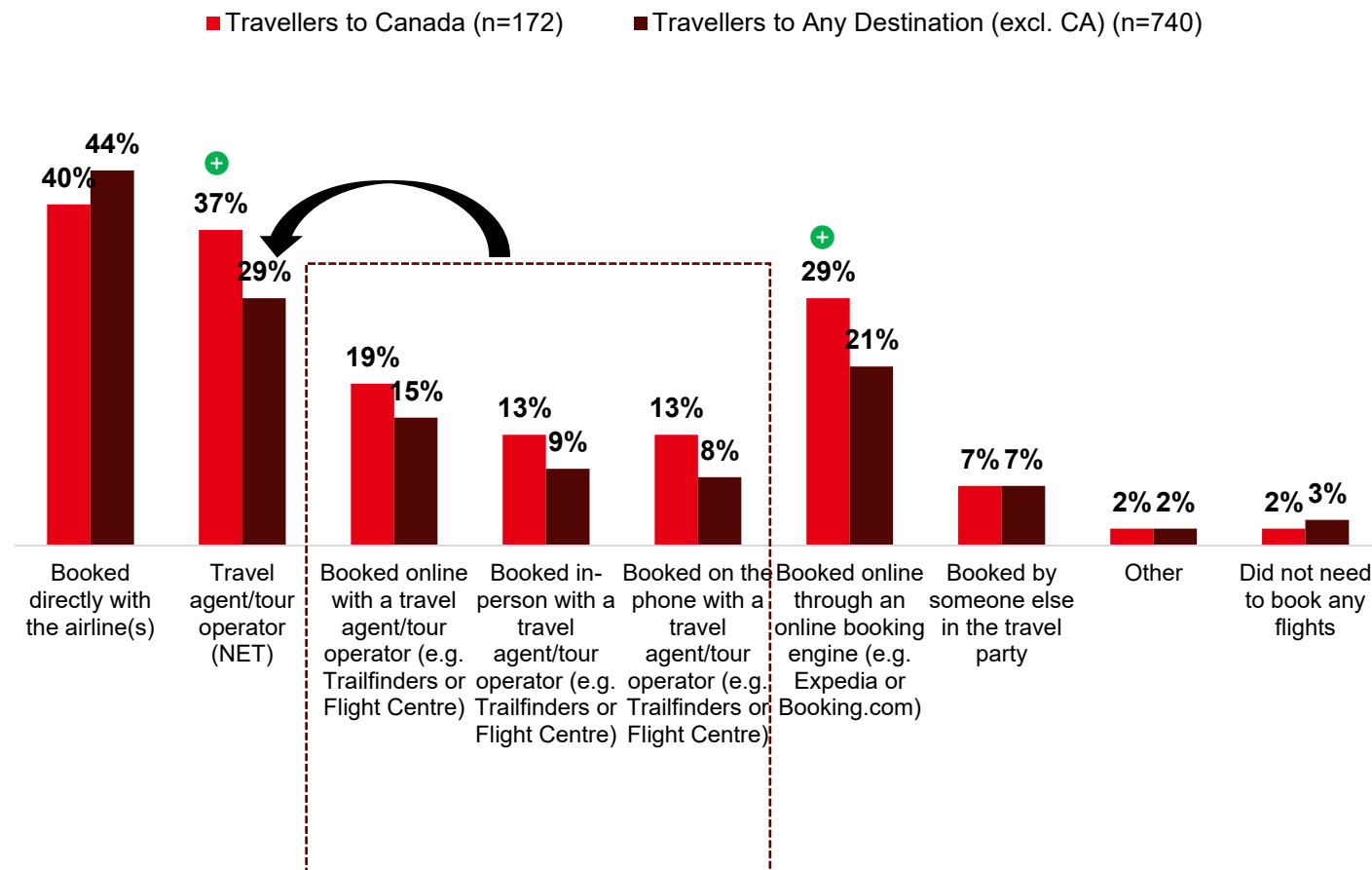


↑ / ↓ = significantly higher/lower result (2024 vs. 2023)  
+ / - = significantly higher/lower result (HEG vs. 2024 Total)

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

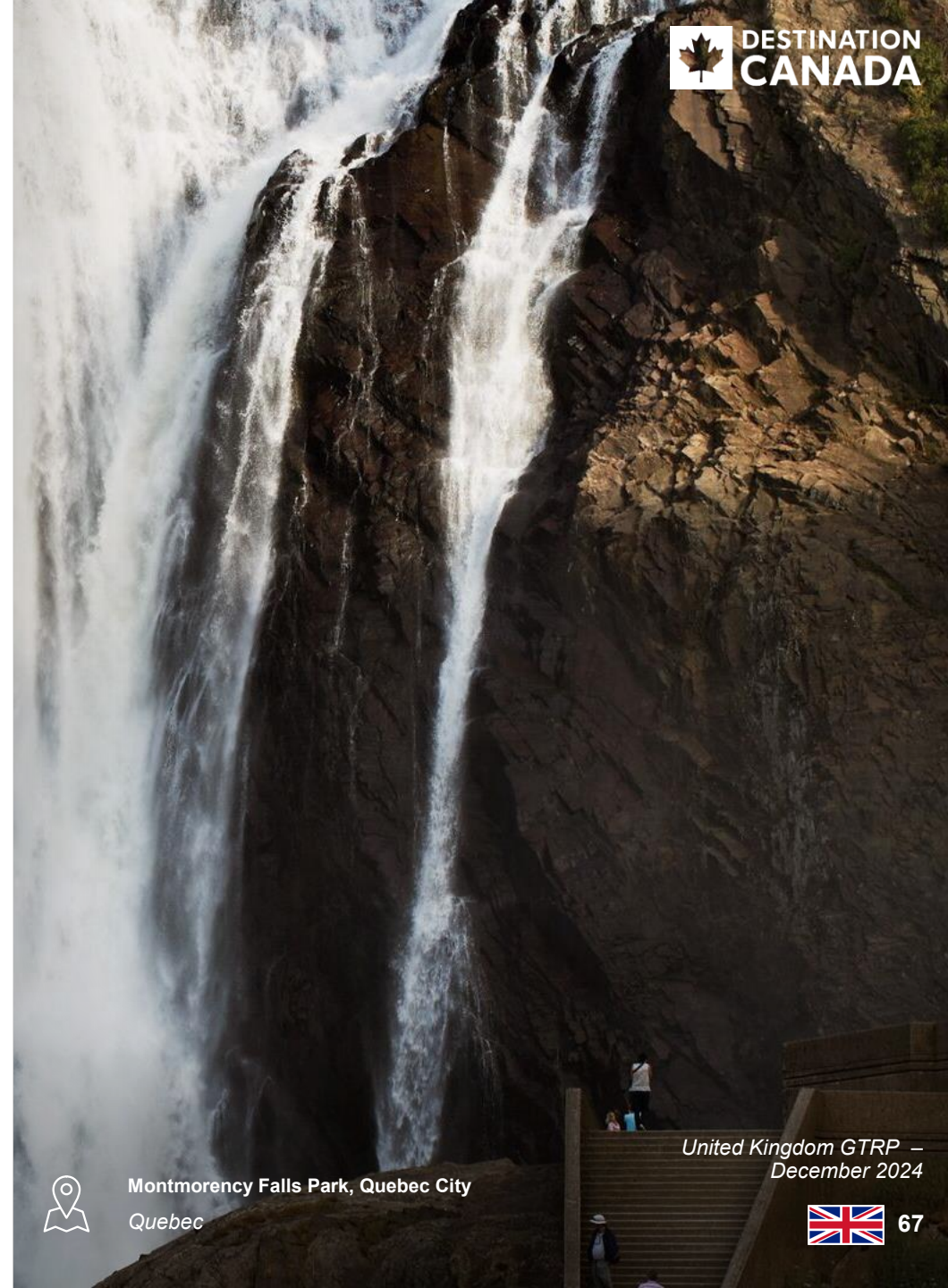
# BOOKING FLIGHTS FOR RECENT TRIP: BY DESTINATION

*Travellers to Canada are more likely to book flights via a travel agent or tour operator or online through an online booking engine.*



+ / - = significantly higher/lower result (Travellers to Canada vs. Any Destination (excl. CA))

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



Montmorency Falls Park, Quebec City  
Quebec

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December 2024



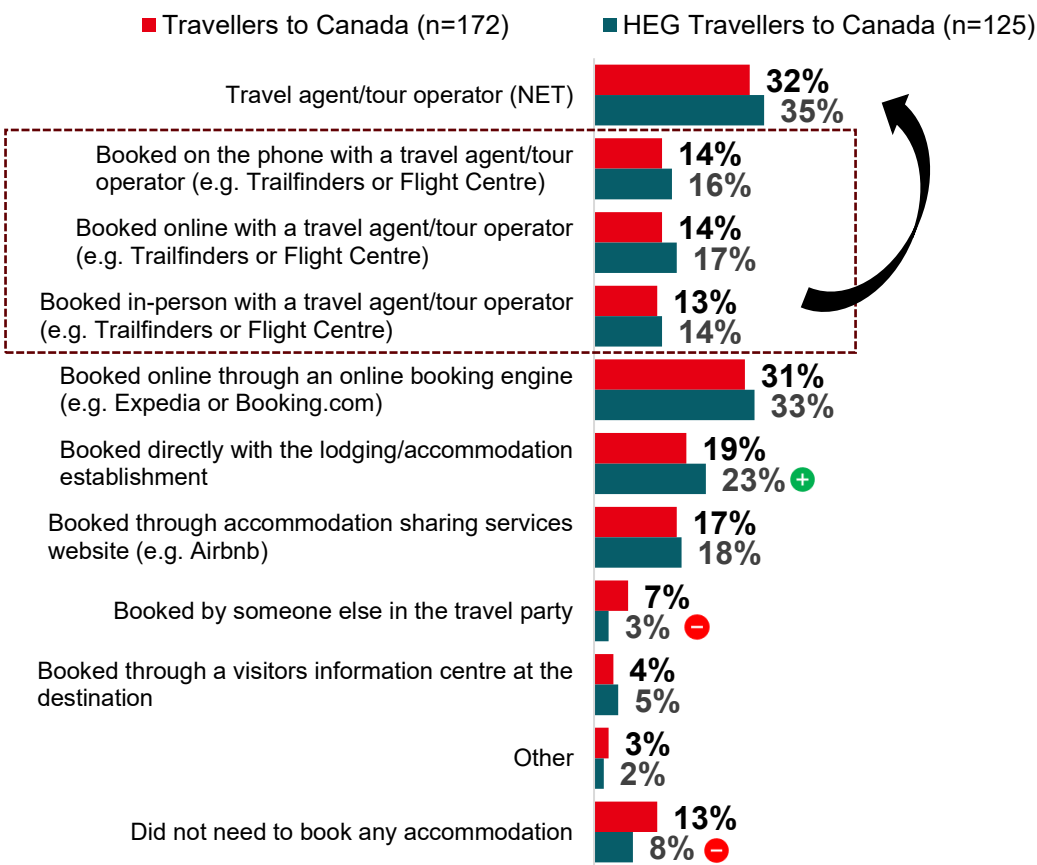
# BOOKING ACCOMMODATIONS FOR RECENT TRIP

Using a travel agent or tour operator or booking online through an online booking engine are the most popular ways to book accommodations. HEGs are more likely to book directly through the establishment, and less likely by someone else in the travel party.

Total Travellers to Canada: Trended



Total Travellers to Canada vs. HEG Travellers to Canada

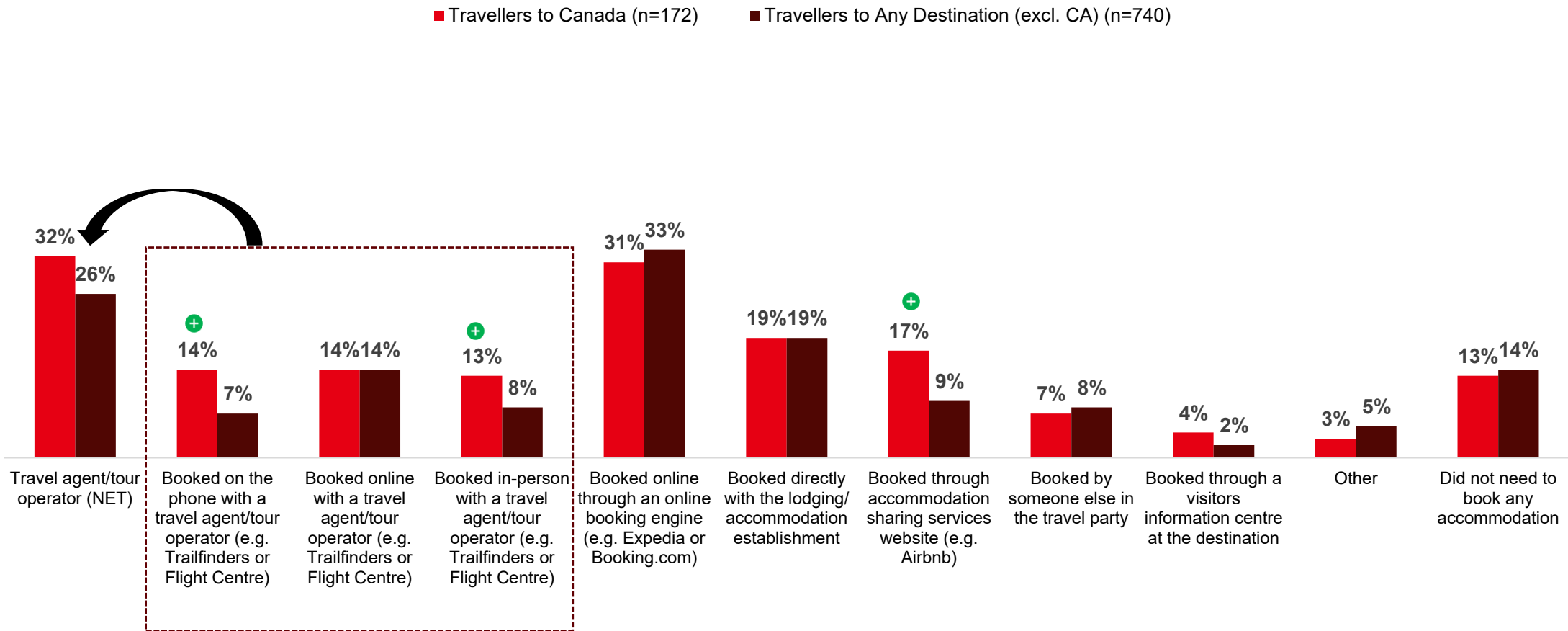


↑ / ↓ = significantly higher/lower result (2024 vs. 2023)  
+ / - = significantly higher/lower result (HEG vs. 2024 Total)

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

# BOOKING ACCOMMODATIONS FOR RECENT TRIP: BY DESTINATION

Travellers to Canada were more likely to book accommodations via the phone or in-person with a travel agent or tour operator or through accommodation sharing services compared to travellers to other destinations.



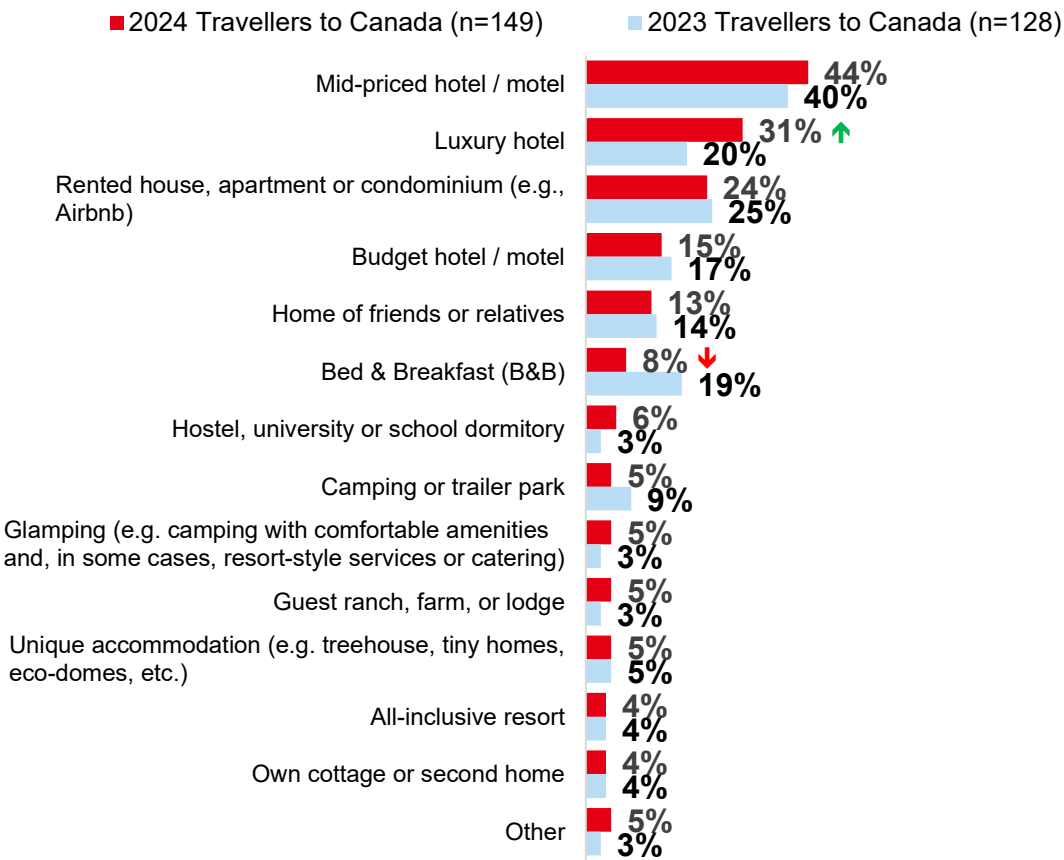
+ / - = significantly higher/lower result (Travellers to Canada vs. Any Destination (excl. CA))

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

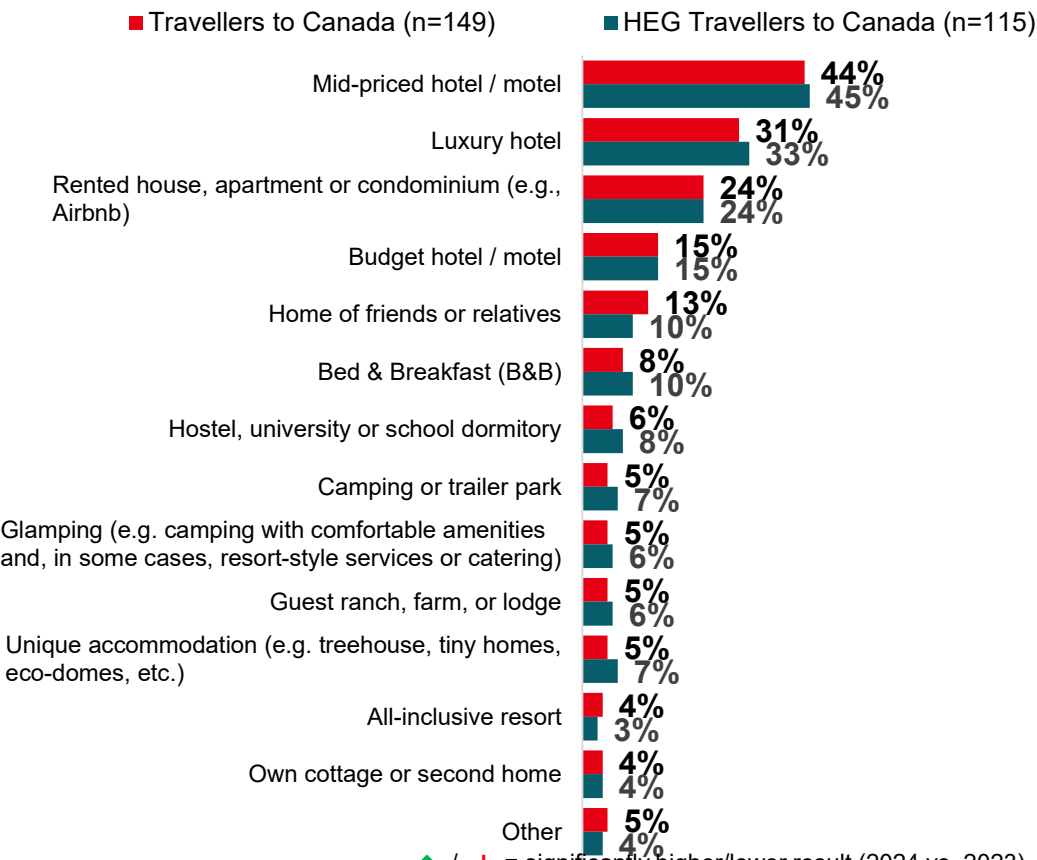
# TYPE OF ACCOMMODATIONS FOR RECENT TRIP

Stays in luxury hotels has increased compared to last year, while stays at bed & breakfasts has declined.

Total Travellers to Canada: Trended



Total Travellers to Canada vs. HEG Travellers to Canada



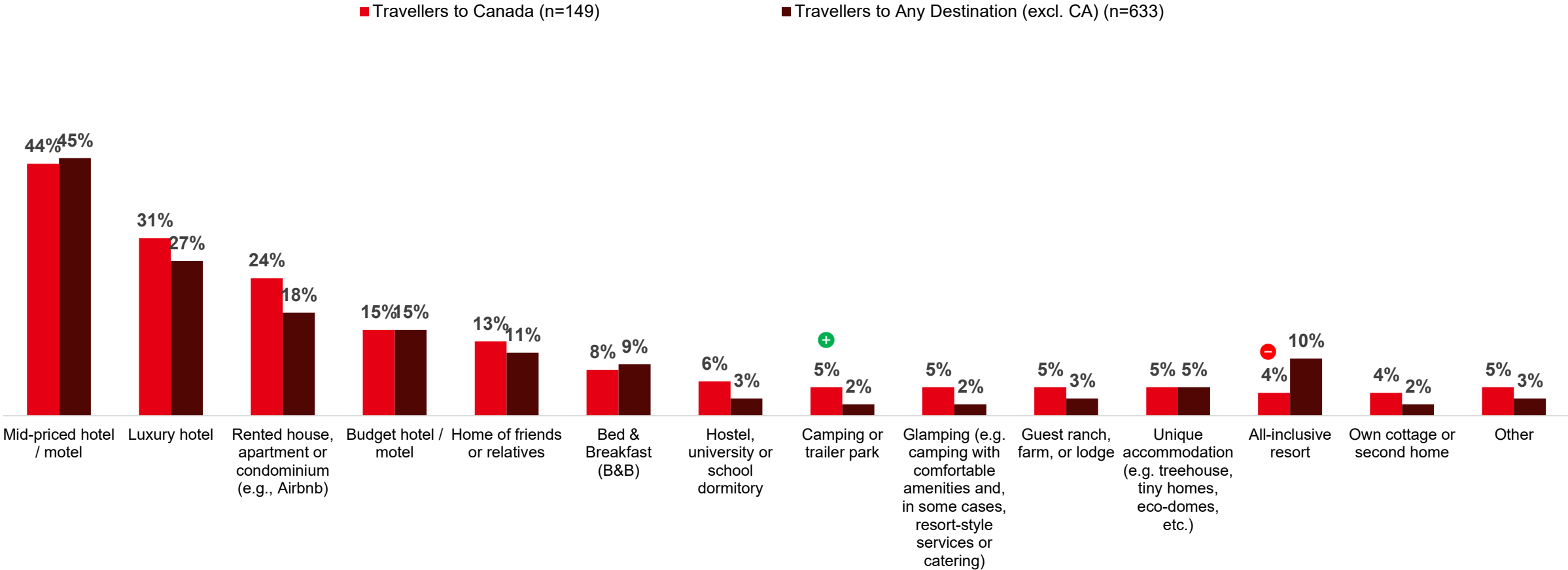
↑ / ↓ = significantly higher/lower result (2024 vs. 2023)  
+ / - = significantly higher/lower result (HEG vs. 2024 Total)

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



# TYPE OF ACCOMMODATIONS FOR RECENT TRIP: BY DESTINATION

Mid-priced hotels and luxury hotels were the most popular accommodations for travellers to Canada and for those travelling to other destinations.



+ / - = significantly higher/lower result (Travellers to Canada vs. Any Destination (excl. CA))

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

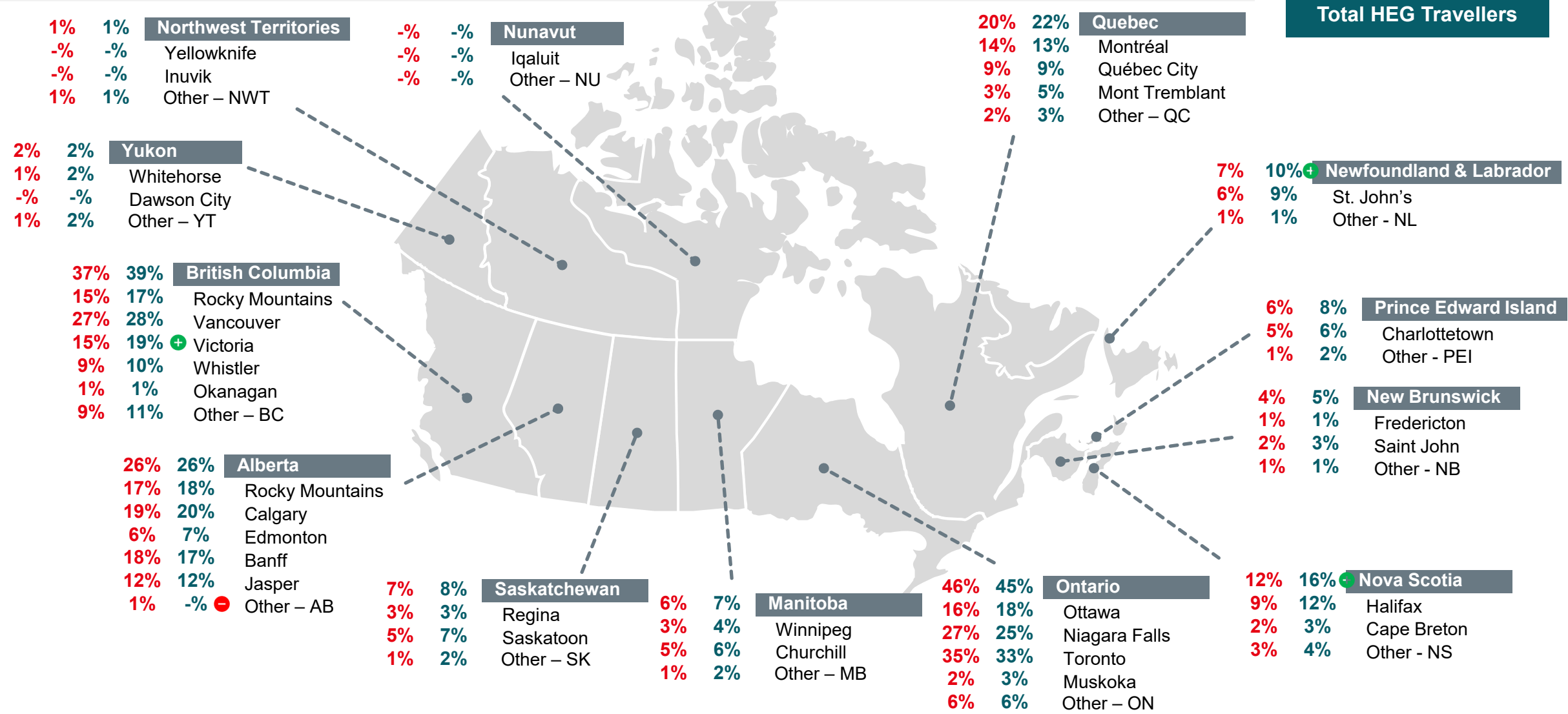
# RECENT TRIP TO CANADA



St. Lunaire-Griquet  
Newfoundland and Labrador

# CANADIAN DESTINATIONS VISITED DURING RECENT TRIP

UK travellers were most likely to have visited Ontario on their most recent trip, followed by BC, Alberta, and Quebec.



Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to Canada (n=172); HEG (n=125)  
F17. Which of the following Canadian provinces or territories did you visit on this trip? (Select all that apply)  
F18a-m. Within [PROVINCE], which travel destinations did you visit? (Select all that apply)

# CANADIAN DESTINATIONS VISITED DURING RECENT TRIP: BY KEY CANADIAN CITIES VISITED



*UK travellers that recently travelled to Canada visited were most likely to also visit BC, Alberta or Quebec on the same trip.*

Canadian Cities Visited on Most Recent Trip					
	Vancouver (n=96)	Calgary (n=62)	Toronto (n=105)	Montreal (n=42*)	Halifax (n=33*)
British Columbia	100%	64%	19%	34%	12%
Alberta	52%	100%	20%	27%	12%
Saskatchewan	7%	8%	6%	9%	15%
Manitoba	7%	6%	8%	7%	13%
Ontario	20%	28%	100%	50%	18%
Quebec	15%	16%	23%	100%	48%
New Brunswick	2%	2%	3%	2%	21%
Nova Scotia	4%	3%	6%	21%	100%
Prince Edward Island	2%	2%	4%	12%	51%
Newfoundland & Labrador	3%	5%	4%	14%	33%
Yukon	4%	3%	1%	5%	9%
Northwest Territories	3%	4%	2%	5%	3%
Nunavut	-	-	-	-	-

Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to Canada  
F17. Which of the following Canadian provinces or territories did you visit on this trip? (Select all that apply)  
\*Small base size, interpret with caution (n<50)

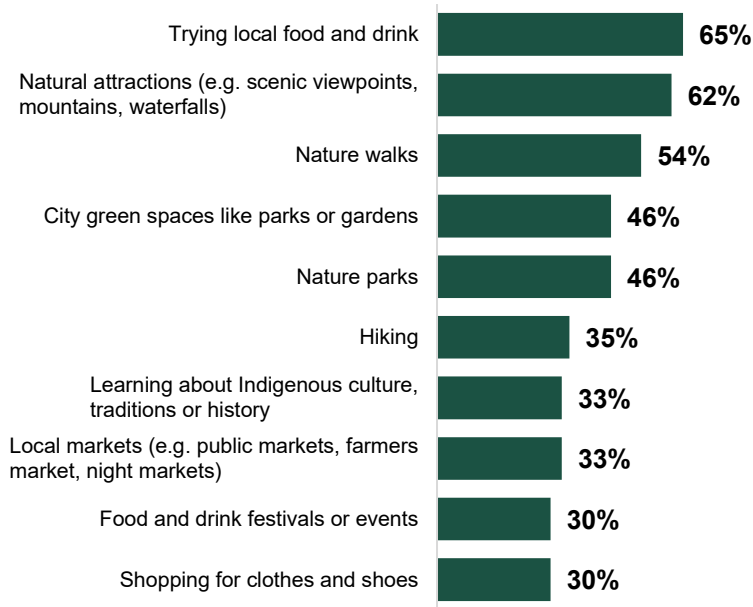


# TOP 10 ACTIVITIES PARTICIPATED IN DURING RECENT TRIP TO CANADA: BY SEGMENT

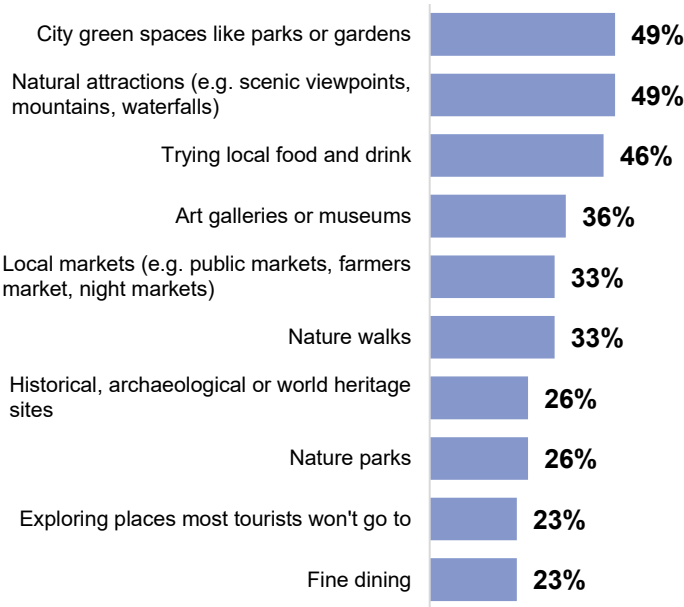
*Outdoor activities like natural attractions, walks and city green spaces, and trying local food and drink are the most popular activities among OEs, CSs and RGs during their most recent trip to Canada.*



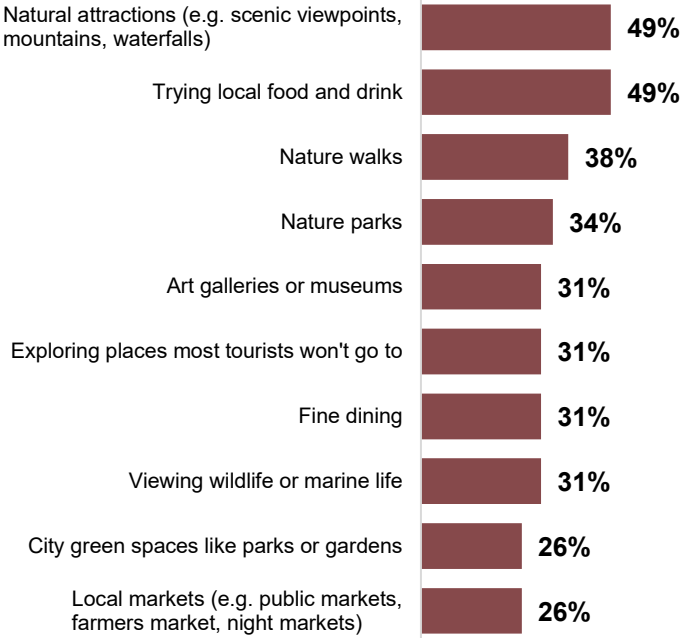
## Outdoor Explorers (n=37\*)



## Culture Seekers (n=39\*)



## Refined Globetrotters (n=39\*)



*Purpose Driven Families base size too small to report (n=10\*\*)*

Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to Canada F16. Which of the following activities, if any, did you participate in during your recent trip to Canada? (Select all that apply)  
\*Small base size, interpret with caution (n<50)



# THANK YOU

For any questions, please reach out to [research@destinationcanada.com](mailto:research@destinationcanada.com)

