

2025 GLOBAL TRAVELLER RESEARCH PROGRAM

UNITED HIGHLIGHTS REPORT



Canada



Vancouver British Columbia



CANADIAN TOURISM DATA
COLLECTIVE

TABLE OF CONTENTS

03

Study Overview: UK
Market

14

Indigenous Travel

04

Key Insights

18

Travel Behaviours

05

Market Sizing

23

Most Recent Trip to
Canada

10

Considering Canada as
a Travel Destination



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 24th –
December 3rd, 2025**



**Geographical Definition
for Qualified Trips**

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



Sample Distribution

Sample distribution:	National
Highly Engaged Guest (HEG) Audience:	1110
Other travellers:	417
Total sample size:	1527

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





Canada continues to be a leading international destination among UK travellers, with next 2-year immediate potential for Canada being 4.5M. The current geopolitical climate has also aided in Canada's popularity among UK travellers, with 26% stating they are more likely to visit Canada as a result.



Summer is the most popular time of year for potential visitors to Canada, followed by fall, with the majority of potential visitors interested in BC and Ontario.



UK travellers are most likely to base an entire holiday around natural attractions and heritage sites, while also being interested in trying local cuisine, and going on nature walks.



Canada ranks fourth as a top-of-mind Indigenous destination among UK travellers. Interest in Indigenous culture is high, driven by a preference for authentic experiences, as well as safety and comfort.



While the use of AI has increased for UK travellers compared to 2024, nearly three in ten still used a travel agent to research or book their most recent trip to Canada. UK travellers were more likely to book flights directly with airlines, while booking accommodations through online booking engines.

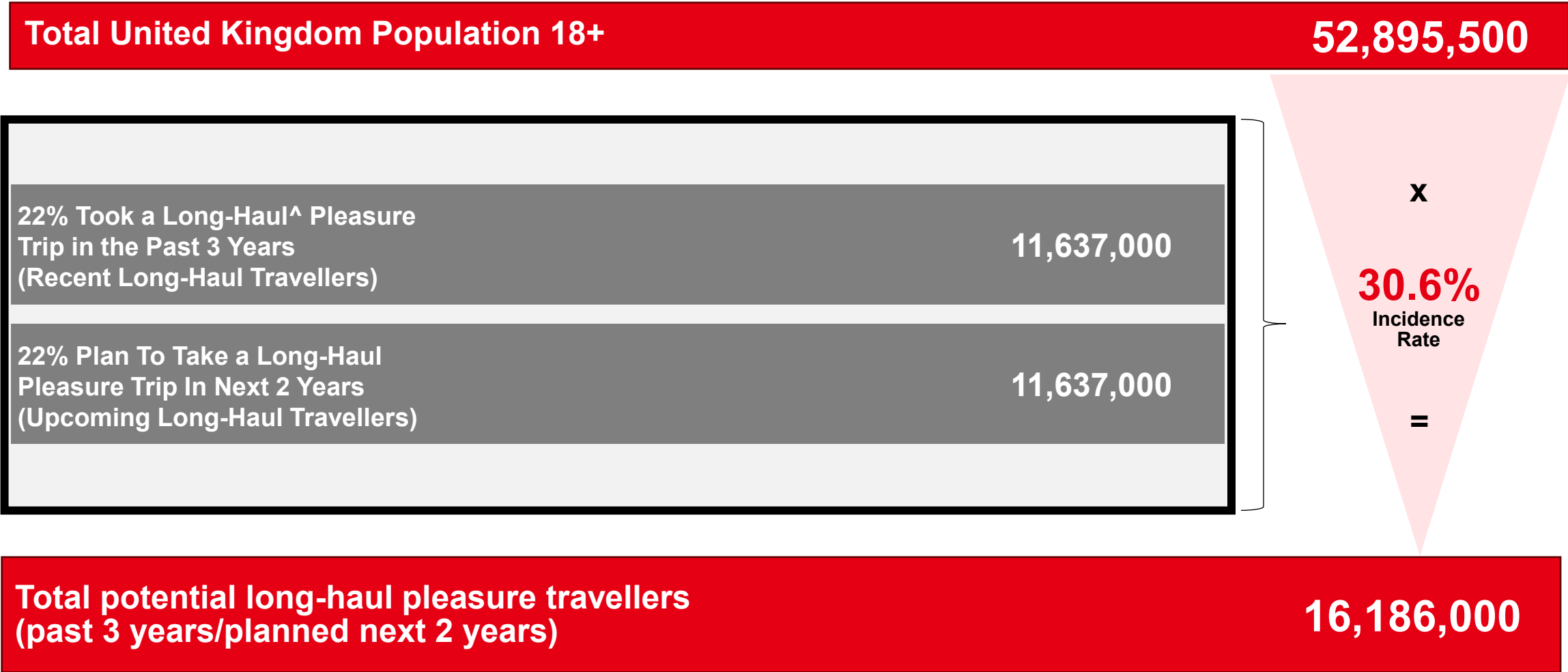
MARKET SIZING



Killarney Provincial Park
Ontario

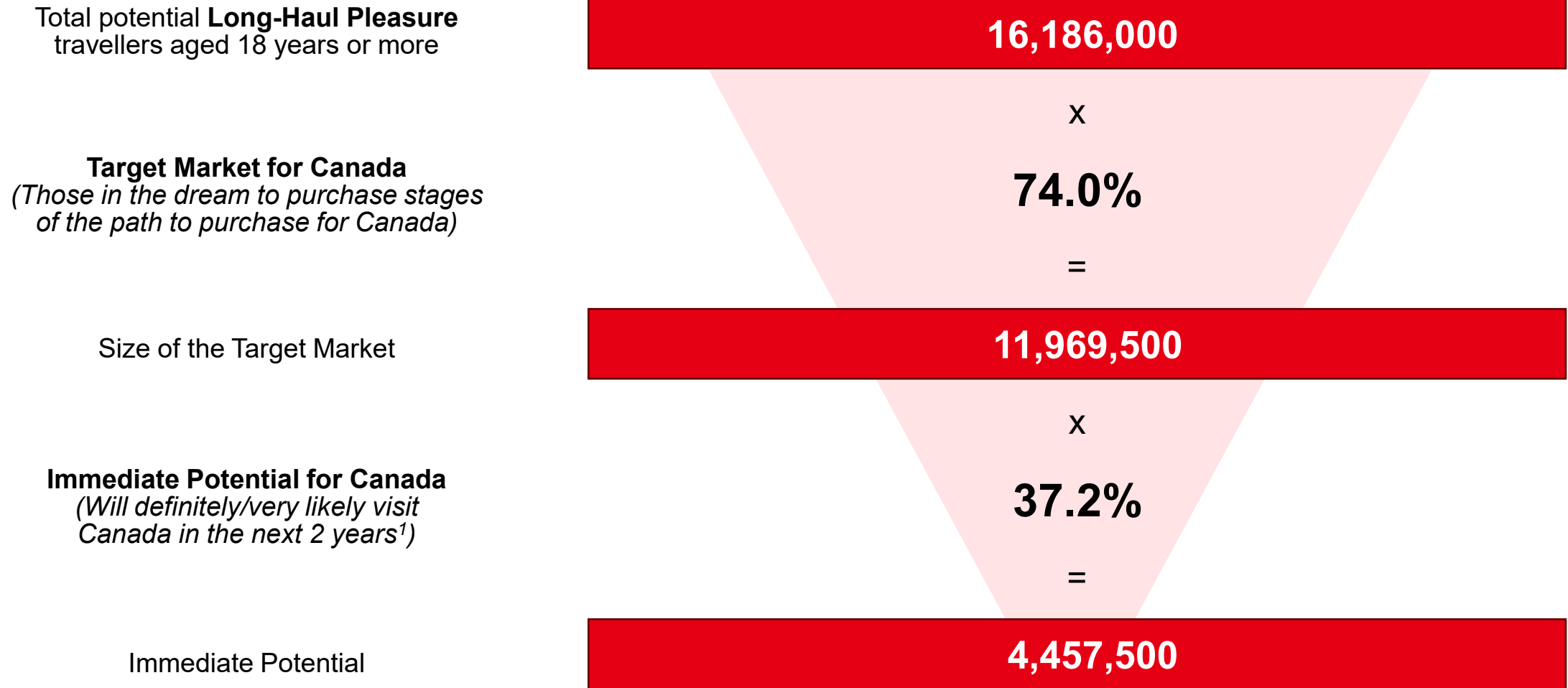


MARKET SIZING – LONG-HAUL TRAVELLERS



[^] 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)

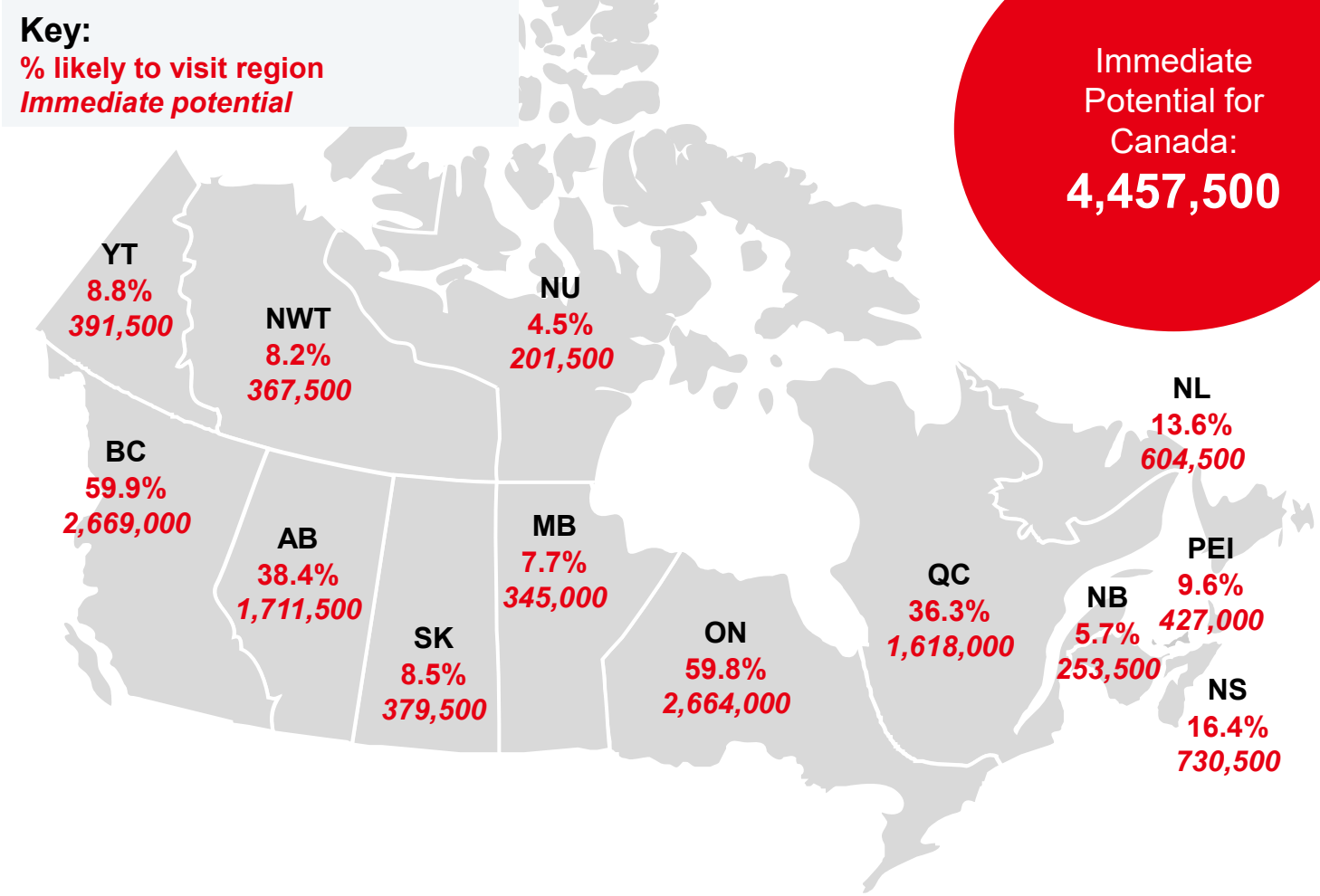


¹ Includes respondents likely to visit Canada for a trip of 1 to 3 nights, or a trip of 4 nights or more.
 Base: Target market for Canada = long-haul pleasure travellers (past 3 years or next 2 years) (n=1527); Immediate potential for Canada = dream to purchase stages for P2P for Canada (n=1129)
 C1. 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

BC and Ontario have the potential to draw in over 2.6 million UK travellers each over the next 2 years.

Immediate Potential for Canada:
4,457,500



Nunavut

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=1129)
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%	17%	25%	22%
Alberta	5%	11%	14%	11%
Saskatchewan	1%	2%	3%	2%
Manitoba	1%	2%	3%	2%
Ontario	6%	16%	26%	19%
Quebec	4%	9%	14%	13%
New Brunswick	1%	2%	2%	2%
Nova Scotia	1%	4%	6%	6%
Prince Edward Island	1%	2%	4%	3%
Newfoundland & Labrador	1%	5%	5%	5%
Yukon	1%	2%	3%	3%
Northwest Territories	1%	3%	3%	3%
Nunavut	0%	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=1129) E3a-m. During what time of year are you considering visiting [PROVINCE]? (Select all that apply)



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

Whitehorse
Yukon

United Kingdom GTRP –
December 2025

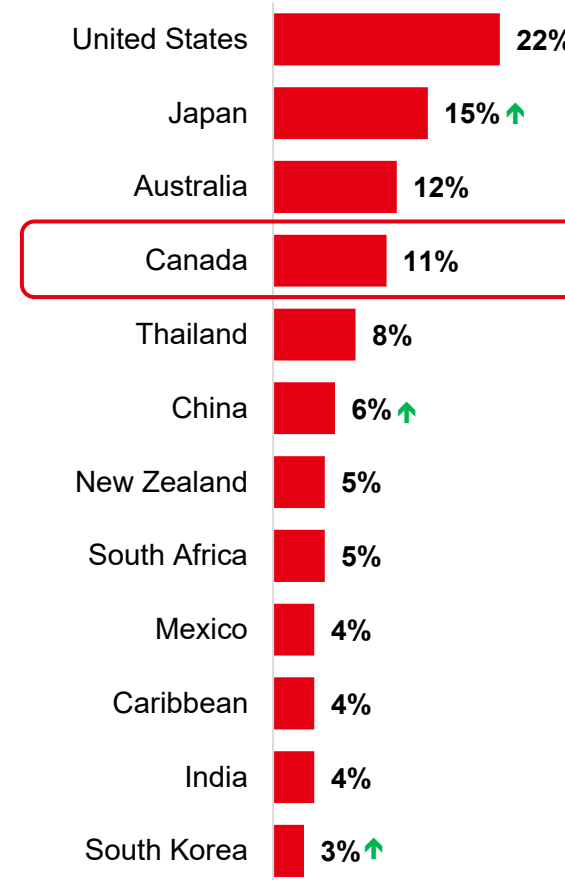
CONSIDERING CANADA AS A TRAVEL DESTINATION



Alberta



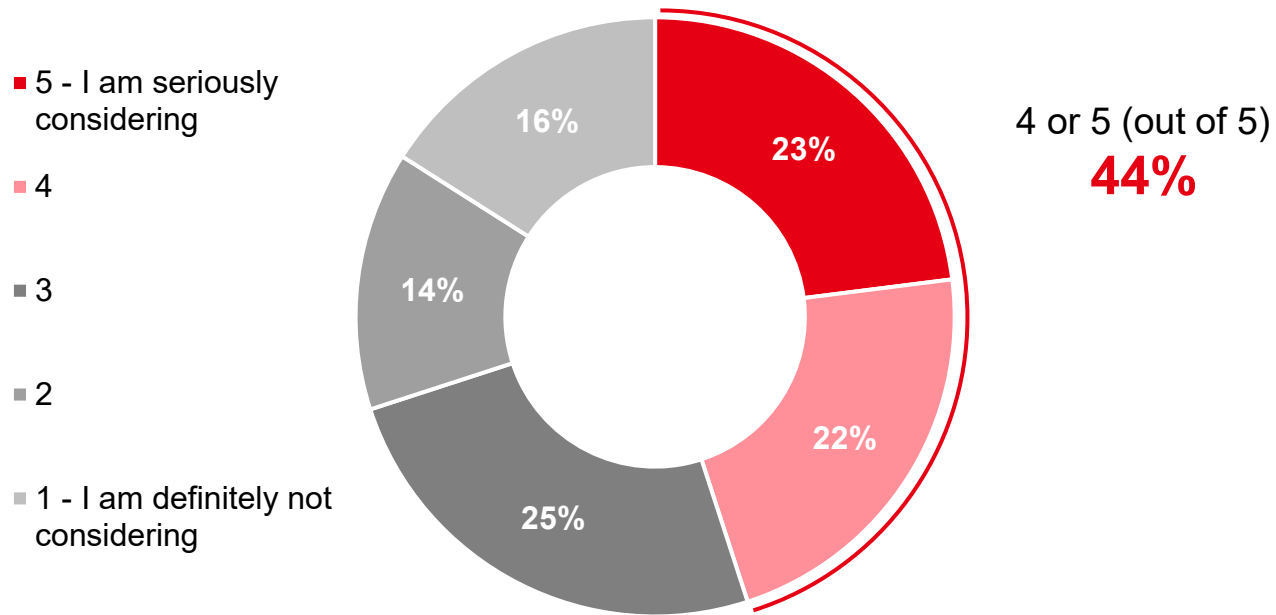
UNAIDED DESTINATION CONSIDERATION (NEXT 2 YEARS)¹



On an unaided basis, Canada ranks fourth as a destination UK travellers are considering, behind the US, Japan, and Australia.

¹ 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=1527)
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)

AIDED CONSIDERATION FOR CANADA (NEXT 2 YEARS)



Over four in ten UK travellers are considering travelling to Canada in the next 2 years.



↑ / ↓ = significantly higher/lower result (2025 vs. 2024)

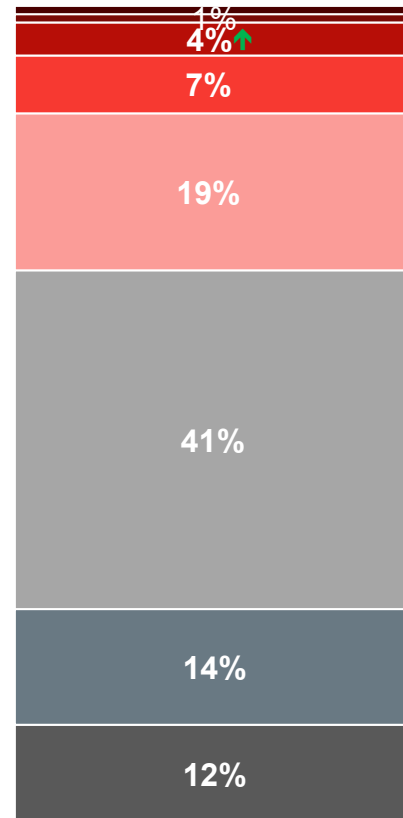
Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=1527)
C2. You may have already mentioned this before, but would you consider visiting each of the following destinations in the next 2 years?
Please use a 5-point scale where 1 means 'I am definitely not considering' and 5 means 'I am seriously considering'.

United Kingdom GTRP
– December 2025



STAGE IN THE PURCHASE CYCLE FOR CANADA

- Have already booked my transportation and accommodations
- Am currently making transportation and accommodation arrangements
- Am planning the itinerary for a trip to this country
- Have started to gather some travel information for a trip to this country
- Seriously considering visiting / returning in the next 2 years
- Dreaming about visiting / returning someday
- Not interested in visiting / returning in the foreseeable future
- Have never thought of taking a trip to this destination



Actively Planning trip to Canada **14%↑**

↑ / ↓ = significantly higher/lower result (2025 vs. 2024)

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=1527)
 C1. Which of the following best describes your current situation when thinking about each of the following destinations for a vacation trip? (Select one for each)



Over one in ten UK travellers are actively planning a trip to Canada, a significant increase compared to 2024.

Lake Louise
Alberta

United Kingdom GTRP
– December 2025

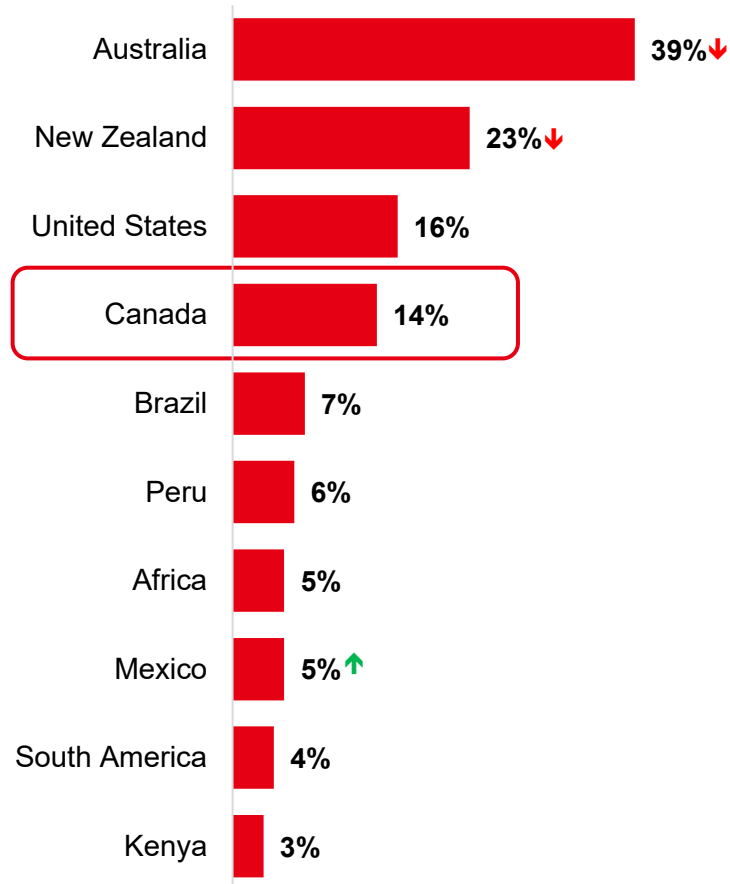
INDIGENOUS TRAVEL



Carcross
Yukon



UNAIDED INDIGENOUS DESTINATION



↑ / ↓ = significantly higher/lower result (2025 vs. 2024)

Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=1527)

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.



Manitoulin Island
Ontario

United Kingdom GTRP –
December 2025



INTEREST IN CANADA AS AN INDIGENOUS DESTINATION



Over one half of UK travellers are interested in participating in Indigenous experiences in Canada, with nearly one third being very interested.



Kelowna
British Columbia

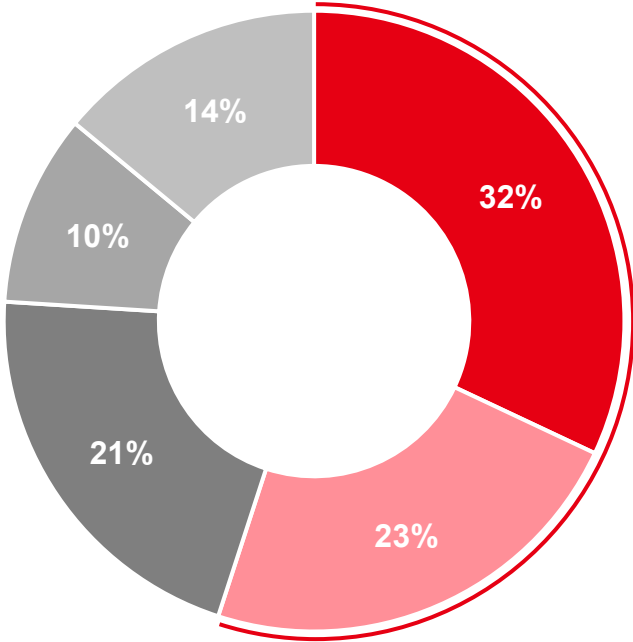
■ 5 - Very interested

■ 4

■ 3

■ 2

■ 1 - Not at all interested



4 or 5 (out of 5)
54%

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=771)
 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

Authenticity is the primary driver of interest in Indigenous cultural experiences, followed by safety and comfort, though mentions of safety and comfort have declined significantly year over year.



Victoria
British Columbia

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=756)
 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



TOP 10 TRIP ANCHORS ACTIVITIES

28%

Natural Attractions

19%

Viewing Wildlife or Marine Life

25%

Historical, Archaeological, or World Heritage Sites

15%

Nature Walks

21%

Northern Lights

14%

Nature Parks

21%

Trying Local Food and Drink

12%

Art Galleries or Museums

19%

Oceanside Beaches

11%

Cruises

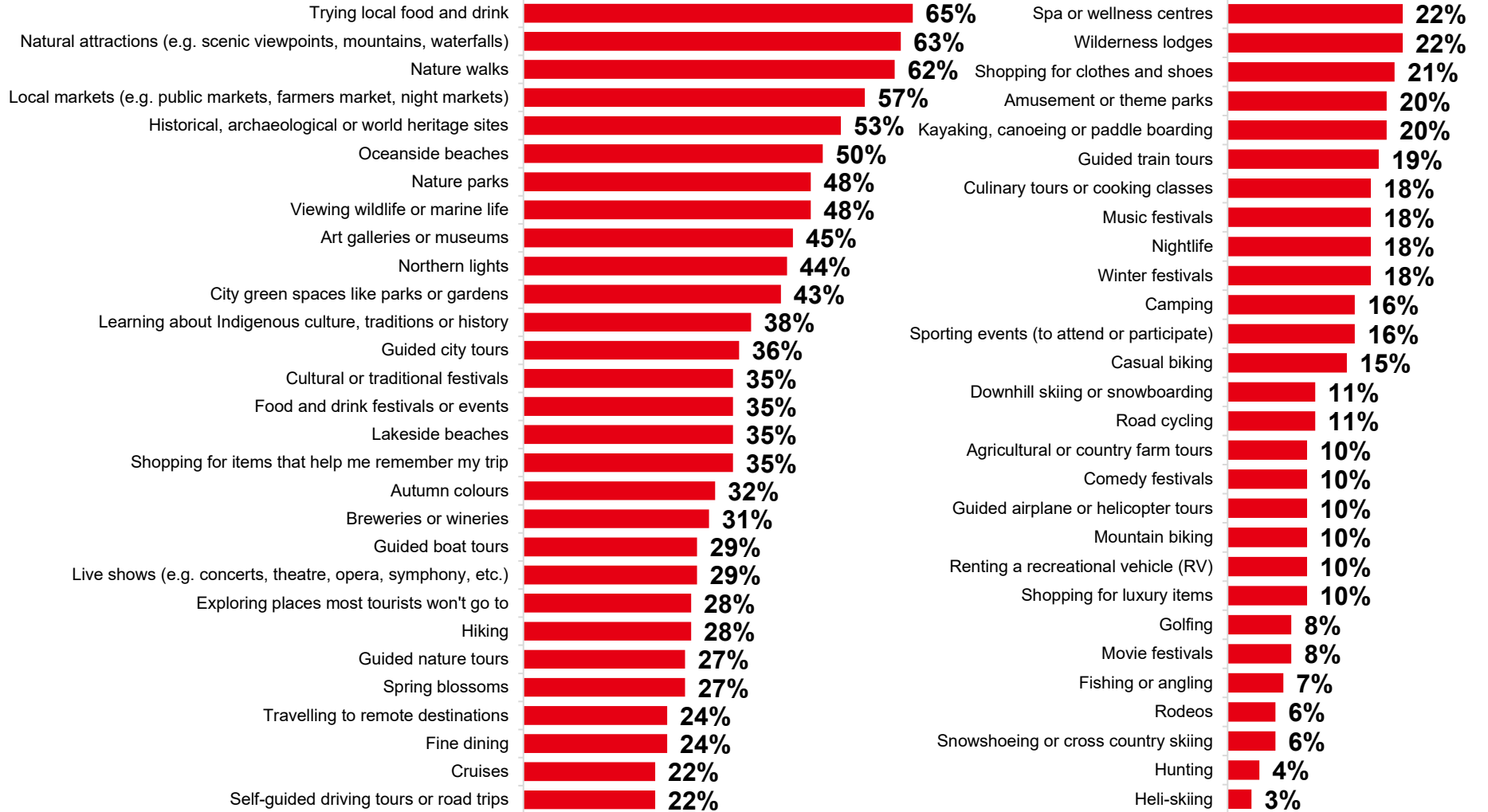


UK travellers are most likely to base an entire holiday around natural attractions and historical archaeological or world heritage sites.



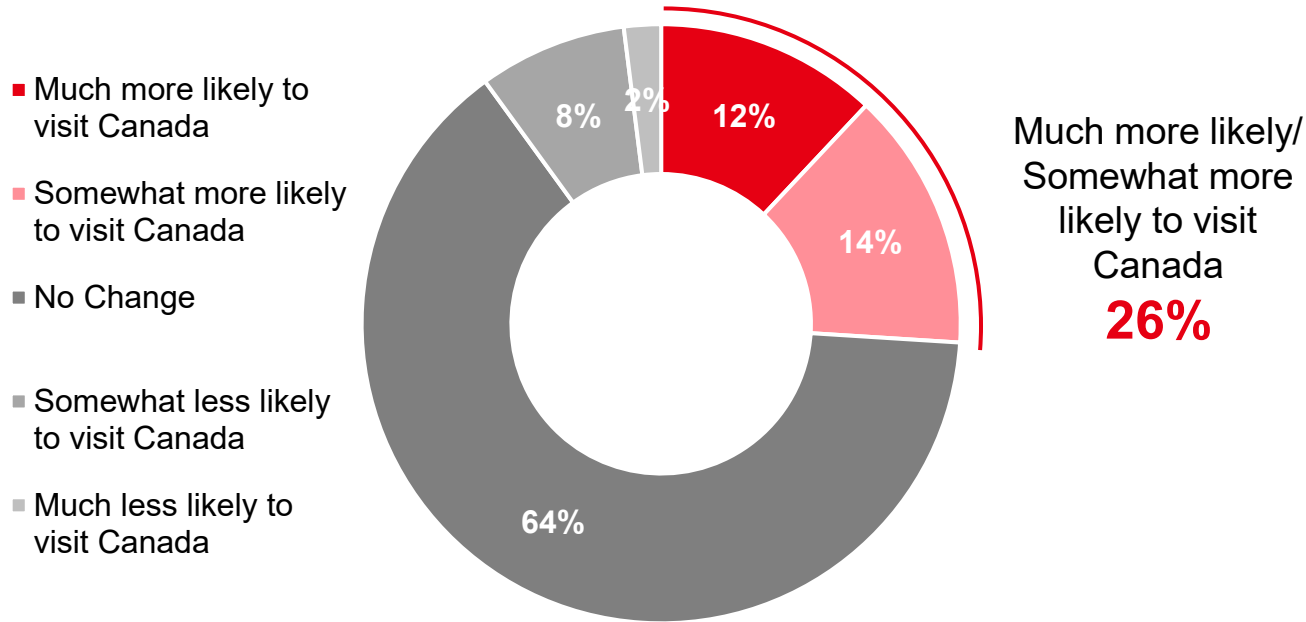
GENERAL ACTIVITIES INTERESTED IN (FULL LIST)

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



Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=1527)
 D4. In general, what activities or places are you interested in while on holiday? (Select all that apply)

STATED IMPACT OF GEOPOLITICAL CLIMATE ON VISITING CANADA



Geopolitical Climate Description

Geopolitical climate can include factors such as politics, international relations, trade disputes, or global conflicts.

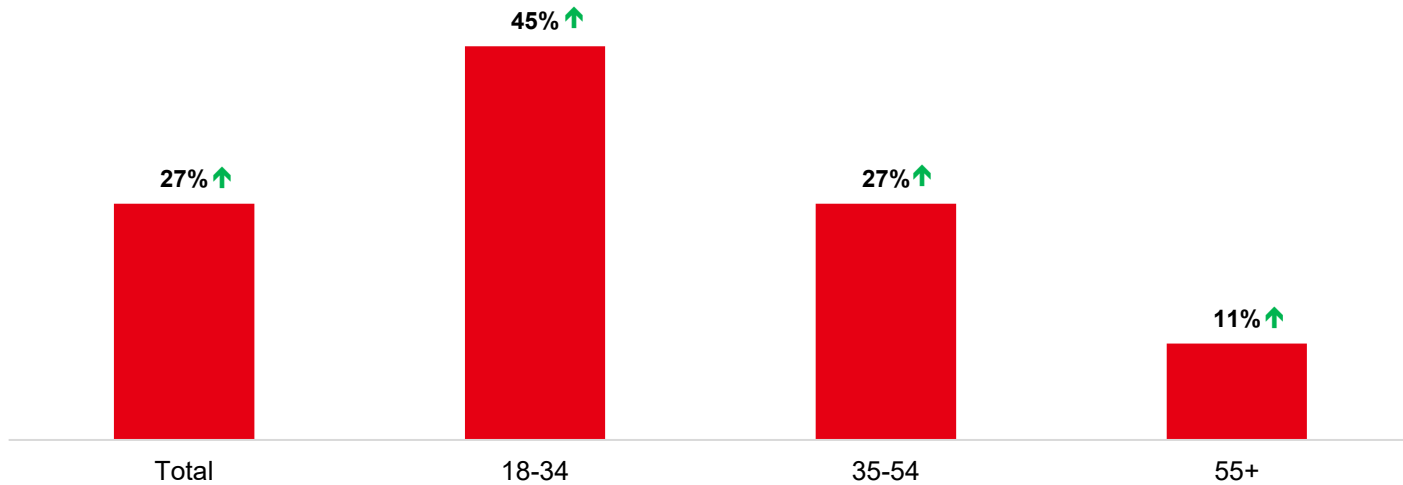
Note: respondents were asked either about decision for which airline to fly with (D18) or stated impact of geopolitical climate on visiting Canada (E16)
 Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=756)
 E16. How does the current geopolitical climate affect your likelihood of visiting Canada?



One fourth of UK travellers feel that the geopolitical climate would make them more likely to visit Canada, with over one in ten stating it would make them much more likely to visit Canada.



USAGE OF AI TOOLS TO PLAN TRIPS: BY AGE



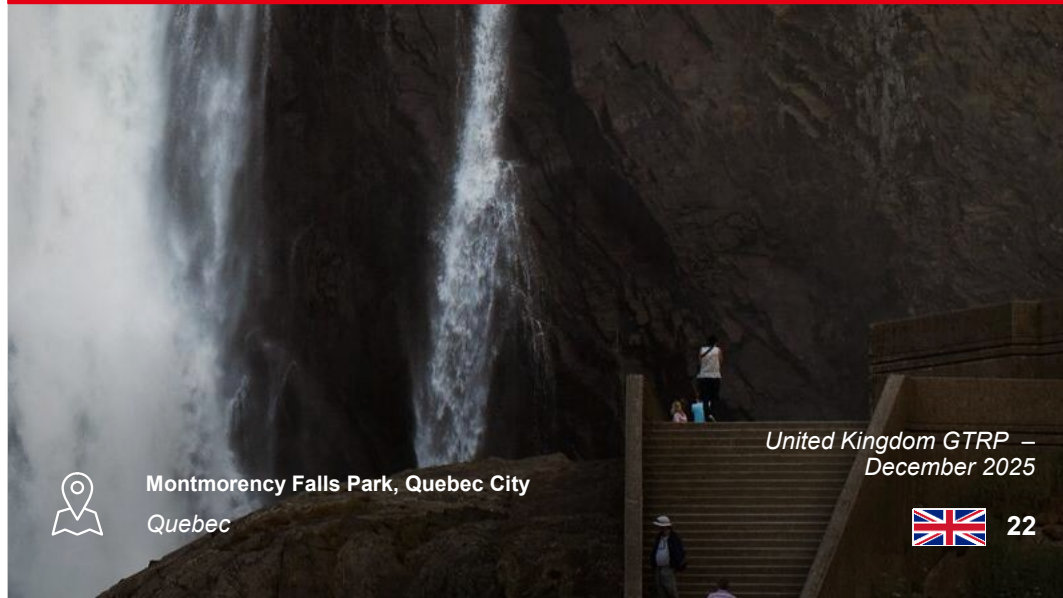
Over one quarter of UK travellers have used AI during at least one phase of their trip planning or booking. Usage across all age groups has also increased compared to last year.

↑ / ↓ = significantly higher/lower result (2025 vs. 2024)

Note: Question wording was updated in 2025 to include "booking a trip"
 Base: Long-haul pleasure travellers (past 3 years or next 2 years) 2025 (n=1527); 2025 18-34 (n=502); 2025 35-54 (n=489); 2025; 55+ (n=536)
 D14. Have you ever used an AI tool (e.g. ChatGPT or Bard) to research, plan or book a trip?



Over one quarter of UK travellers have used AI during at least one phase of their trip planning or booking. Usage across all age groups has also increased compared to last year.



Montmorency Falls Park, Quebec City
Quebec

United Kingdom GTRP –
December 2025



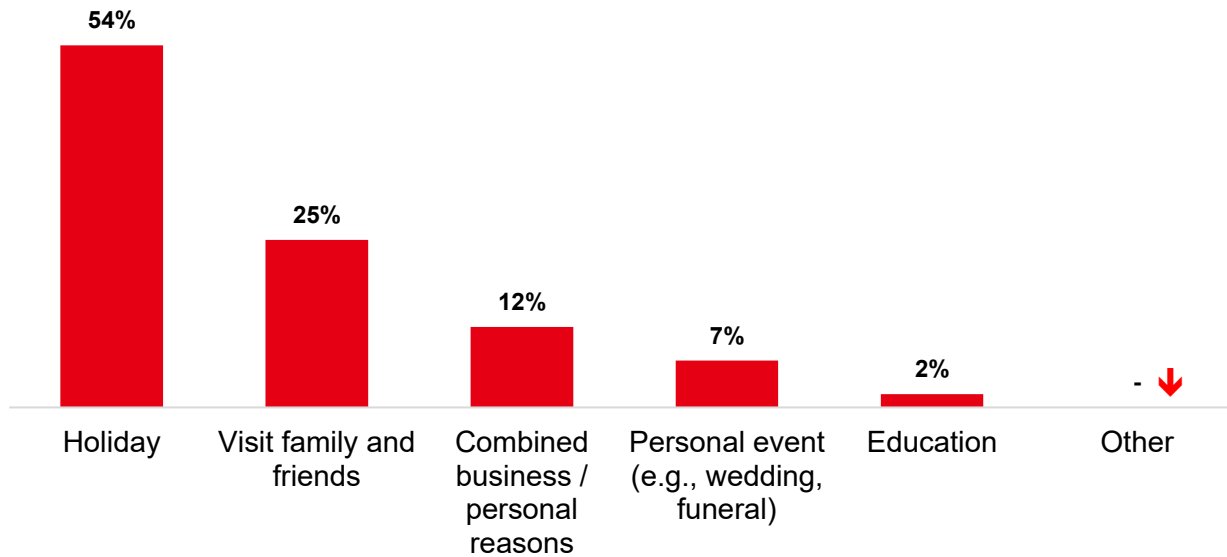
MOST RECENT TRIP TO CANADA



Le Pays de la Sagouine
New Brunswick



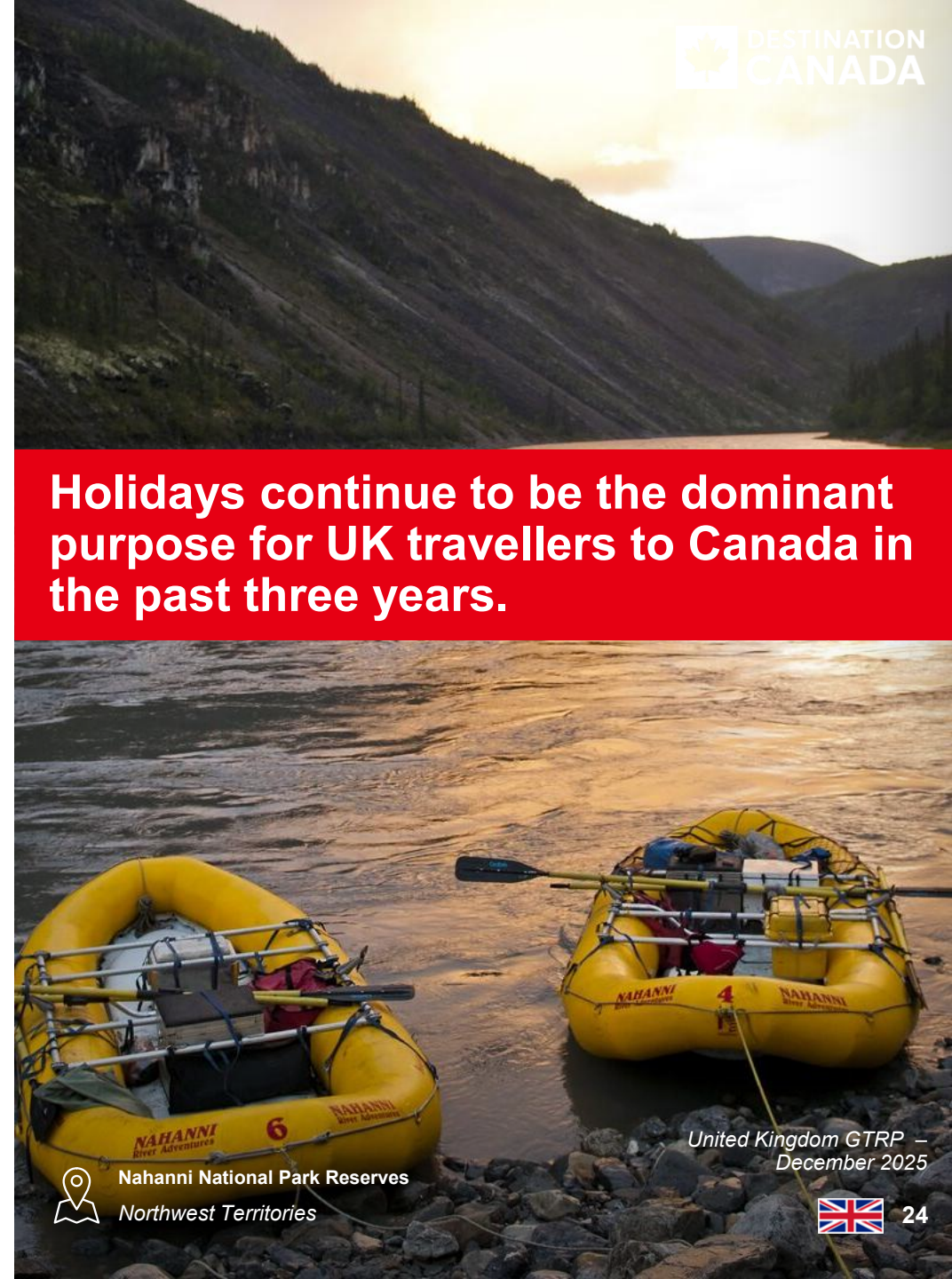
MAIN PURPOSE OF RECENT TRIP



↑ / ↓ = significantly higher/lower result (2025 vs. 2024)

Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to Canada past 3 years (n=243)
 F2. What was the main purpose of this trip? (Select one)

Holidays continue to be the dominant purpose for UK travellers to Canada in the past three years.

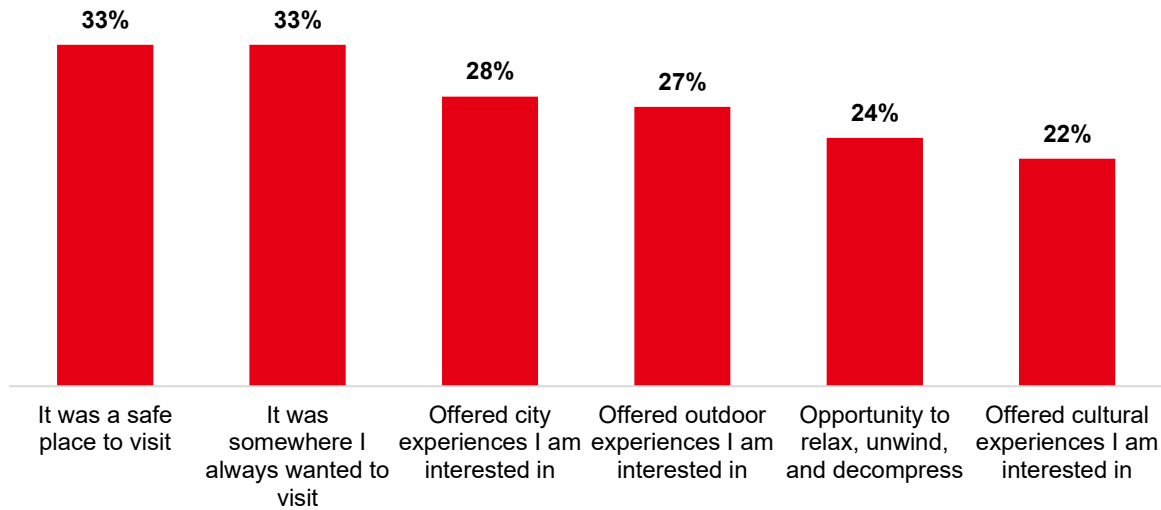


Nahanni National Park Reserves
 Northwest Territories

United Kingdom GTRP –
 December 2025



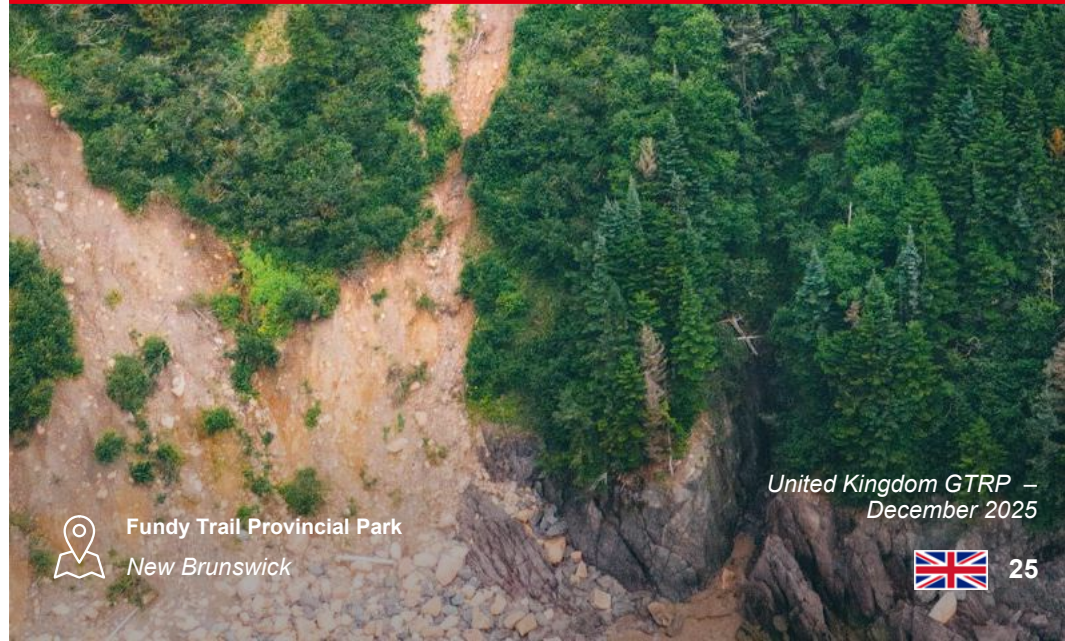
FACTORS IN CHOOSING DESTINATION FOR RECENT TRIP (TOP 6)



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

↑ / ↓ = significantly higher/lower result (2025 vs. 2024)

Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to Canada past 3 years, Took a holiday (n=131)
F3. Which of the following factored into your choice of destination for this trip? (Select all that apply)

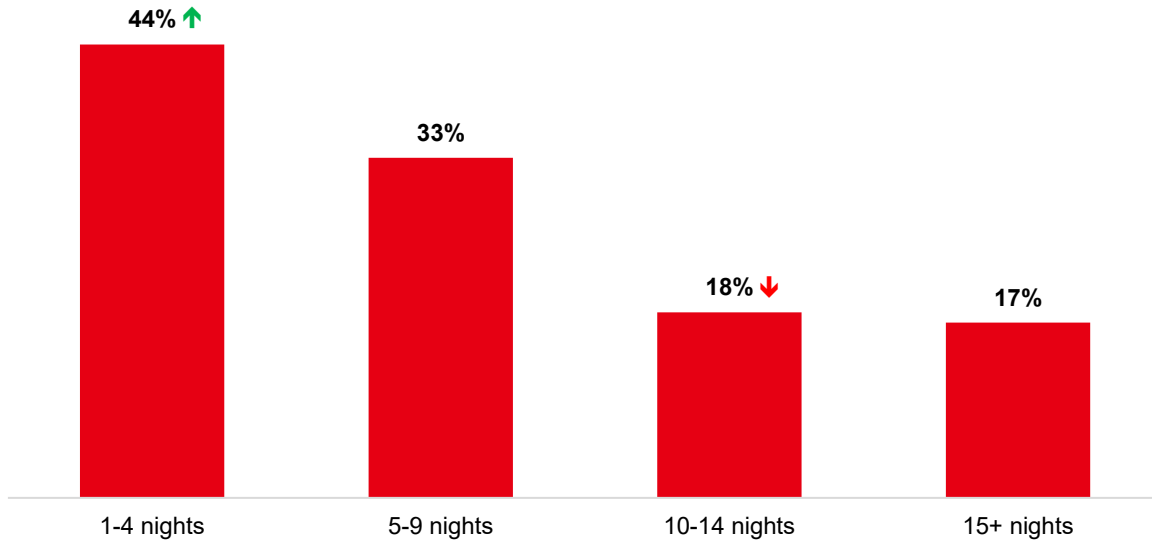


Fundy Trail Provincial Park
New Brunswick

United Kingdom GTRP –
December 2025



NIGHTS SPENT DURING RECENT TRIP



↑ / ↓ = significantly higher/lower result (2025 vs. 2024)

Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to Canada past 3 years (n=243)
F4. How many nights did you spend in this destination?

Shorter trips to Canada have increased compared to 2024, while longer trips of 10-24 nights have declined.



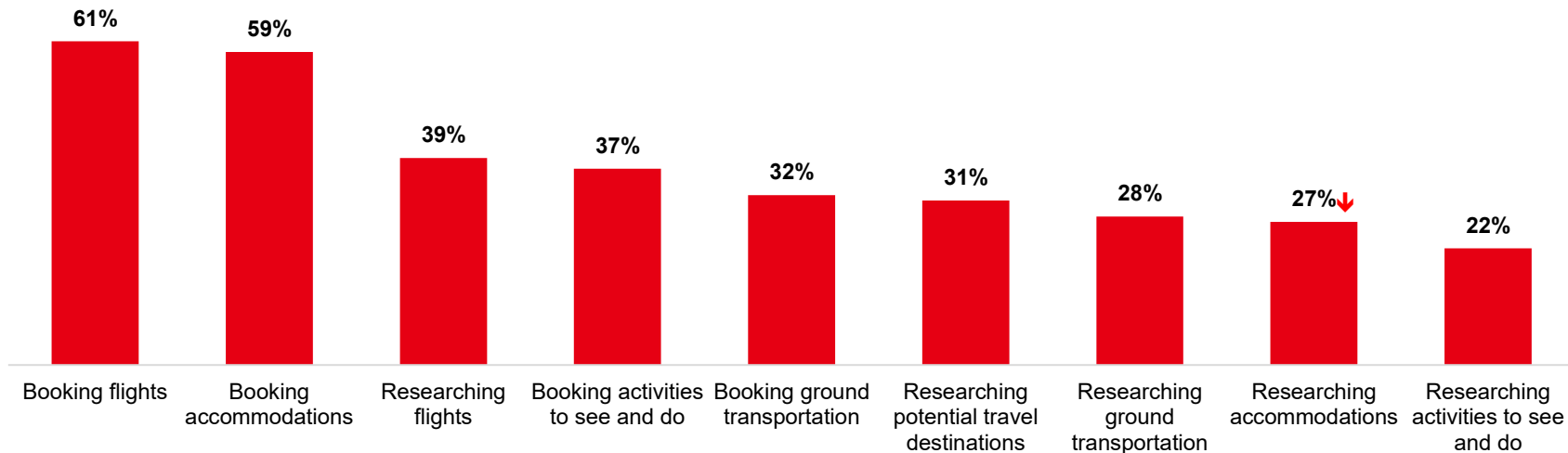
Barren Canyon, Algonquin Park
Ontario

United Kingdom GTRP –
December 2025



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

29% used a travel agent



Nearly three in ten UK travellers to Canada used a travel agent, most likely for booking flights or accommodations. Researching accommodations has decreased compared to 2024.

Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to Canada past 3 years (n=71)

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 AI Travel Assistants or 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 Canada past 3 years, Used a Travel Agent/Tour Operator

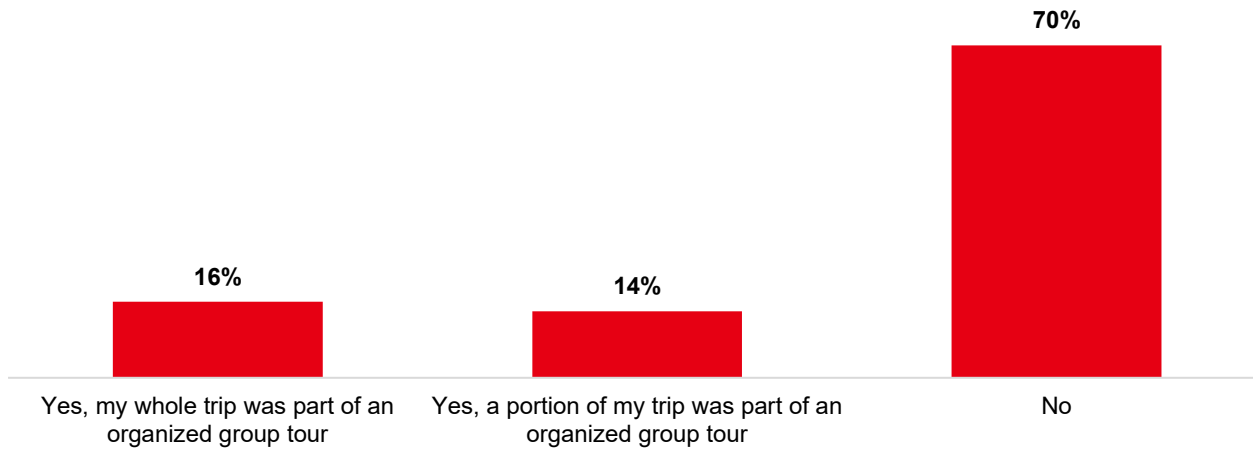
F10. Which of the following did a travel agent or tour operator help you with?

United Kingdom GTRP –
December 2025

Twin Falls Lodge
Saskatchewan



ORGANIZED GROUP TOUR FOR RECENT TRIP



Three in ten travellers to Canada in the past three years used an organized group tour for at least a portion of their trip.

↑ / ↓ = significantly higher/lower result (2025 vs. 2024)

Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to Canada past 3 years (n=243)
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?

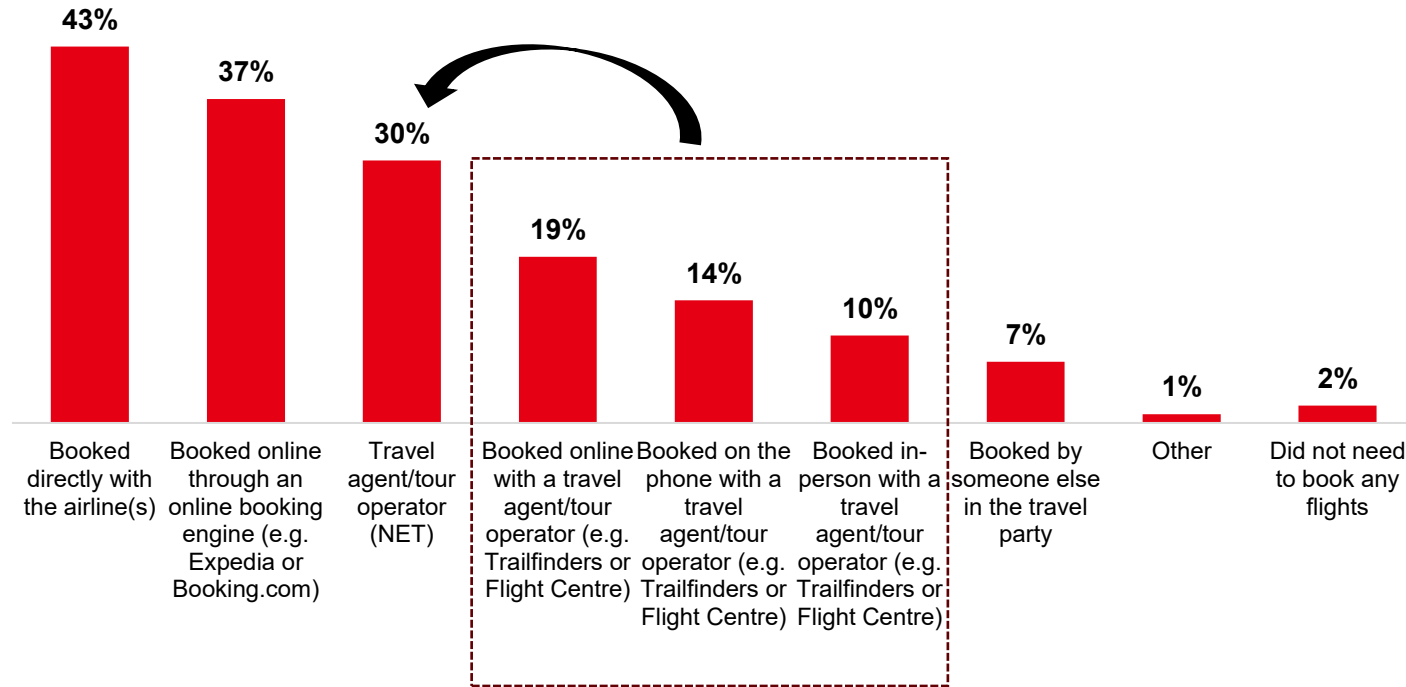


Saskatoon
Saskatchewan

United Kingdom GTRP –
December 2025



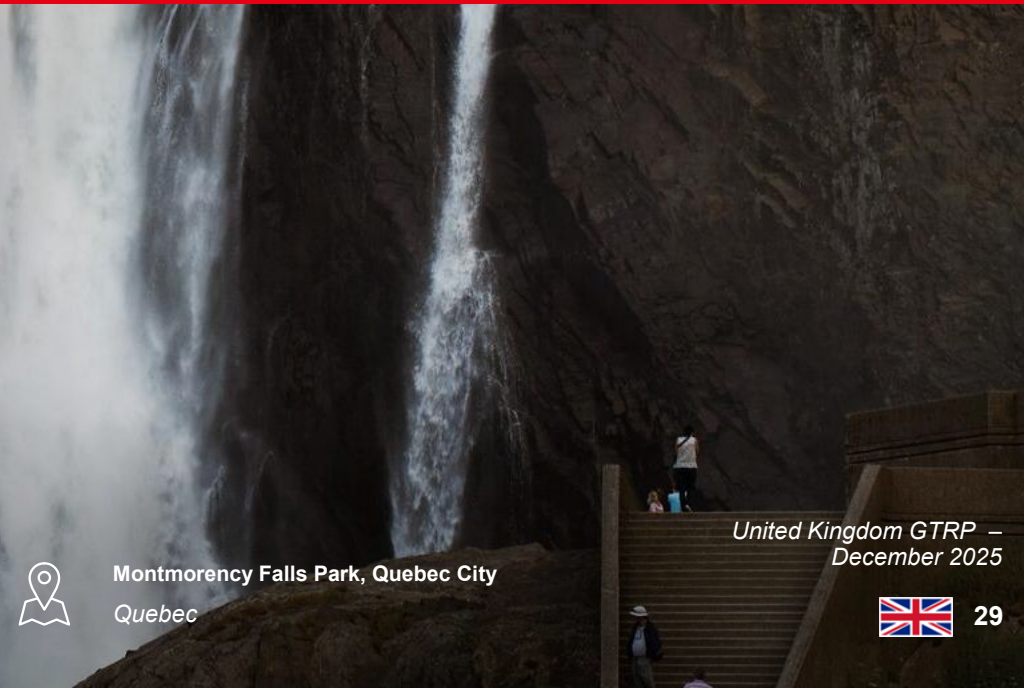
BOOKING FLIGHTS FOR RECENT TRIP



↑ / ↓ = significantly higher/lower result (2025 vs. 2024)

Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to Canada past 3 years (n=243)
 F12. How did you book your flight for this trip? (Select all that apply)

Recent UK travellers to Canada most commonly booked flights directly with airlines, followed by online booking engines and travel agents or tour operators.

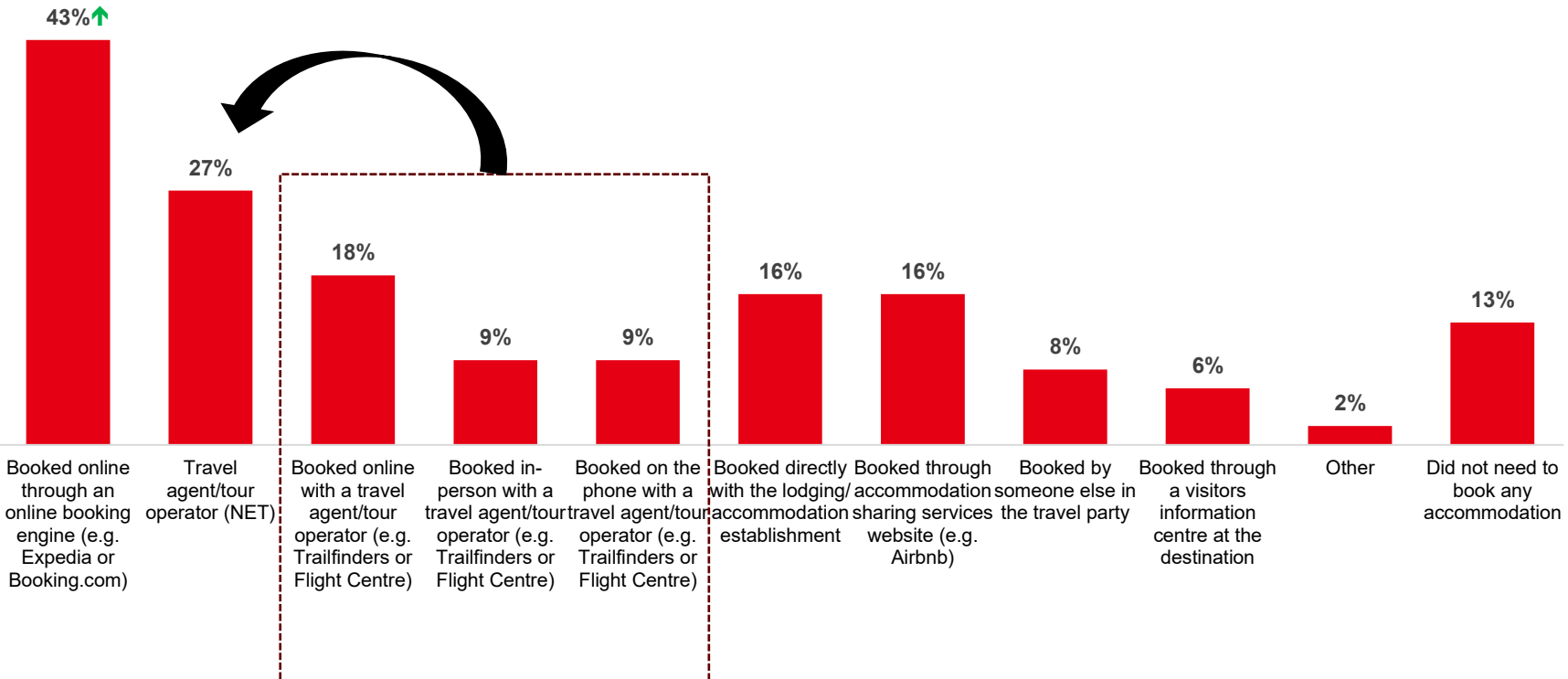


Montmorency Falls Park, Quebec City
 Quebec

United Kingdom GTRP –
 December 2025



BOOKING ACCOMMODATIONS FOR RECENT TRIP

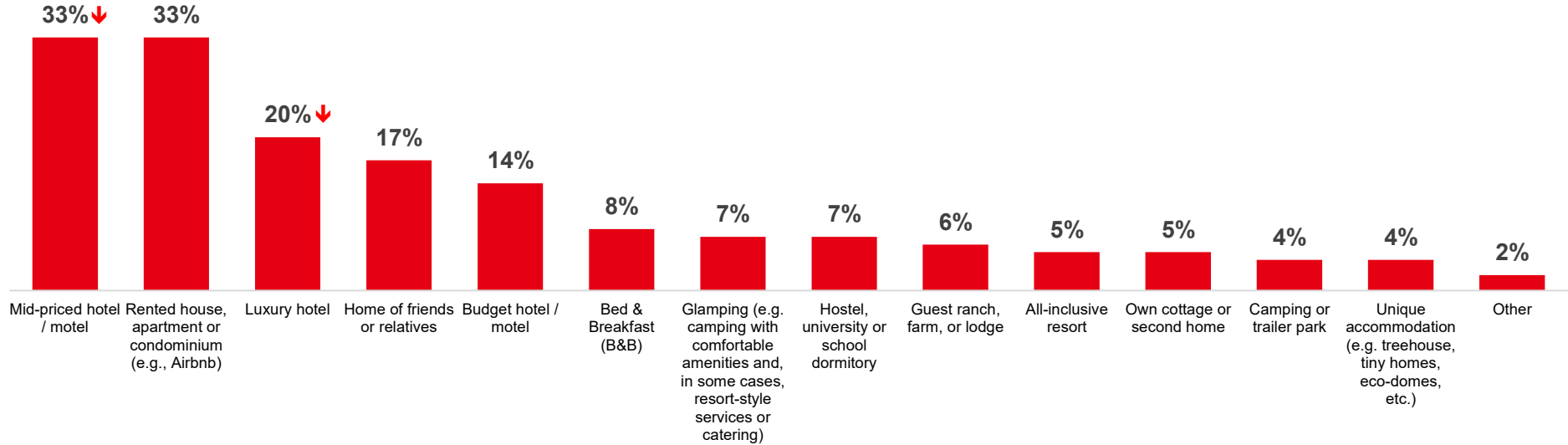


Over four in ten recent UK travellers to Canada booked accommodations through an online booking engine, increasing significantly compared to 2024.

↑ / ↓ = significantly higher/lower result (2025 vs. 2024)
 Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to Canada past 3 years (n=243)
 F13. How did you book your accommodation for this trip? (Select all that apply)



TYPE OF ACCOMMODATIONS FOR RECENT TRIP



↑ / ↓ = significantly higher/lower result (2025 vs. 2024)

Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to Canada past 3 years, Booked Accommodations (n=211)
 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 in mid-priced hotels or motels and rented accommodations. Both mid-priced and luxury hotels have declined year over year.



United Kingdom GTRF
 December 2026

Rideau Canal
 Ontario



THANK YOU

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

