CONFIDENTIAL

UNITED KINGDOM STRATEGIC REPORT

2023 GLOBAL TRAVELLER RESEARCH PROGRAM

DESTINATION CANADA

CANADIAN TOURISM DATA collective

Focus of This Report

- *Study Overview*
- *Key Insights*
- *Overall Travel Outlook & Trends*
- *Canada vs. Competitive Destinations*
- *Increasing Fall & Winter Visitation*
- *Sustainability*
- *Indigenous Tourism*

Study Overview: United Kingdom Market

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The target population are residents aged 18 years and older who have taken a long-haul holiday 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.

HVG Audience Definition: Frequent travellers who are likely to travel long-haul in the next two years and either earn £60,000+ household income per year or are retired.

Timing of Fieldwork

December 5th – 14th 2023

Geographical Definition **for Qualified Trips**

Outside of: Europe, North Africa and the Mediterranean

Sample Distribution

Sample distribution:	**National**
High Value Guest (HVG) Audience:	**333**
Other travellers:	**1199**
Total sample size:	**1532**

TOTAL U.K. PERSPECTIVE
Where applicable, insights are drawn from two of YouGov's proprietary syndicated data products, YouGov Global Travel Profiles and YouGov DestinationIndex to provide overall trends among the population of Total UK Residents 18+

- In 2023, DC switched research providers to YouGov Canada, with the project being migrated over to YouGov's proprietary panel.
  - As a result, no trending is available for the United Kingdom market.

Key Insights

Travel Outlook & Trends

- The **desire to travel** is **high** in the UK, with more than eight in ten travelling internationally at least once every two years. Nearly universal, **propensity to travel outside the country is even higher amongst the HVG audience**
- **Summer** (62%) and **Fall** (63%) are the seasons when the **highest number of UK residents typically travel**, followed by Spring (51%) and Winter (38%)
- In the **ideation phase**, UK travellers rely heavily on **online searches** and **friends/family**
- Approximately **one-quarter of** UK travellers **utilize travel agents and tour operators**. Others primarily **book** their flights and accommodations **directly with the airline/establishment** or through **online booking engines**
- Syndicated results highlight **the importance of social media** when destination marketers evaluate their media mix. Other key sources are **travel websites**, **free to view TV** and **online streaming**
- When it comes to **extreme weather events** and **international conflict**, about **two-thirds** of travellers express a level of **concern** (most only somewhat concerned). However, only 1 in 10 have had to change plans due to these issues

Canada vs. Competitive Set

- The **US leads** in terms of **long-haul travel destinations ever visited**. However, **Canada** is the **second most visited**, with about 37% of total UK Travellers and 46% of HVGs having ever visited the country
- **More than half** of UK travellers to Canada **have visited Canada more than once.** This **repeat visitation** indicates a **positive experience**, reinforced by Canada's **high NPS score** in total (+36) as well as by season
- **The next 2-year immediate potential for Canada is 4.2M**, including 1.2M HVGs
- Second to the US**, Canada is a top long-haul destination, competing most closely with Australia**. It should be noted, however, that **there is stronger interest in Canada (74%) vs. Australia (62%)**
- **Canada** is known as *a place that is* ***safe for visiting*** and ***a place to avoid surprises during holidays***. It also **excels** on several **brand value statements** such as ***embracing cultural diversity***, ***open-mindedness, embracing new ideas*** and *a* ***being good place to live***

Key Insights

Key Drivers & Opportunities

- Overall, the **most influential drivers of consideration** are: *being a **place I want to visit with my family/friends***, *having an **experiential culture***, *trending as a **must-visit spot*** and *a **being good place to live***
- Among the **HVG audience**, similar drivers of consideration are noted, in addition to ***avoiding surprises*** and ***proud to tell people I visited***
- **Several dimensions represent white space** in which no single destination dominates. Compared to top drivers of destination consideration, the following could be **key opportunity areas for Canada to focus on**: *being a place to visit with my family/friends* and *being a place travellers would be proud to visit*
- There is **also opportunity** to drive consideration to visit by **boosting perceptions of highly influential drivers** like: *cultural experience, a trending must-visit spot* and *a great place for holidays that avoid surprises*

Fall/Winter Travel

- **Canada** is a **top destination** that comes to mind for **Winter travel** (competing most closely with Switzerland) and **ranks second** in terms of a **Fall destination** (behind the US)
- There is an **opportunity for Canada to attract more visitors** in the Fall and Winter, with 10 million and 6.1 million typically travelling during these respective months
- The **two-year immediate potential** for Canada is **greater** in the **Fall (6M)** than in the **Winter (2.7M)**
- Travellers considering a **visit to Canada** in the **Fall** are motivated primarily by **price** and **the weather**. They most want to experience the **natural attractions, the Northern lights** and **wildlife**
- While the **weather** is also a barrier for some in the Fall, it is a **far greater barrier in the Winter**. Those who are interested in a **Winter holiday in Canada** are most attracted to the **Northern lights** and **city sightseeing**

Key Insights

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Sustainable Travel

- While **sustainability** is only a **moderate priority**, ***environmental-friendliness and social responsibility*** still fall in the top half of consideration drivers for UK travellers. **Iceland and New Zealand** currently have the edge on perceptions of ***being environmentally-friendly***
- The **primary barriers** to sustainable travel are the perception that the **cost is too high** and **lack of information.** This suggests an opportunity for Canada to **educate travellers on the role sustainability plays** as well as its benefits and implications
- Among the various sustainable initiatives, travellers are most drawn to **conservation of natural areas, ensuring that the local culture is not negatively impacted by tourism** and **supporting the local community**
- Interest in sustainability is **less about** the travellers' own personal travel choices as they are less interested in **eco-friendly accommodations** and **activities**

Indigenous Tourism

- **Australia** is by far the destination **most associated** with **Indigenous tourism**. **Canada** is **ranked 4th** behind Australia as well as New Zealand and the US. This is especially noteworthy given how closely Canada competes with Australia on other measures
- While focus will likely be on improving perceptions of Canada's **Indigenous culture** overall, it may be worth highlighting **activities UK travellers** are **most interested in**:
  - Experiencing Indigenous culture through its food/drink
  - Excursions in nature
  - Visiting museums/sites
  - Visiting Indigenous communities
- **Interest is lower** for **learning about residential schools/reconciliation,** or activities such as **hunting/fishing**
- Of note, **insights** related to Indigenous tourism apply to **both the broader target** and **HVGs** as there are no significant differences between the two

Overall Travel Outlook & Trends

Types of Travel Trips

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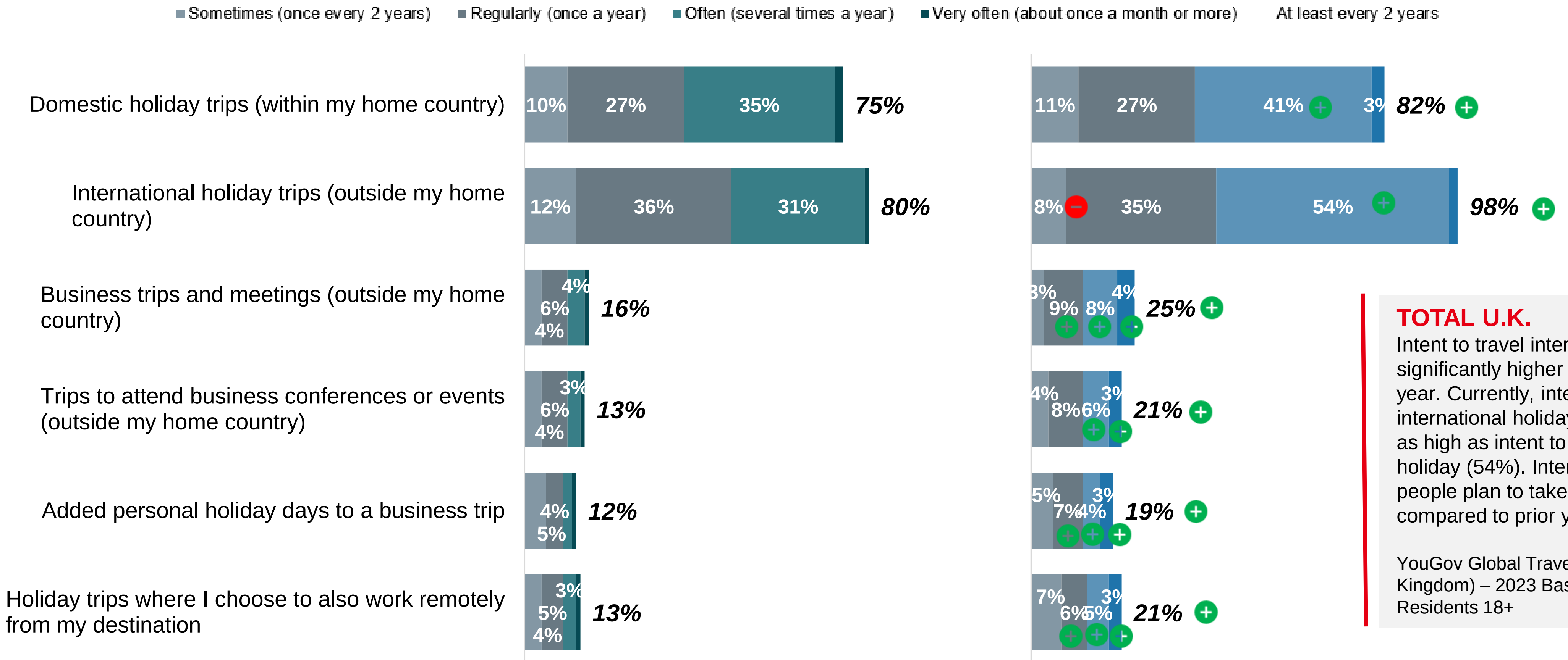
UK travellers are slightly more likely to travel internationally than domestically, with eight in ten travelling internationally at least once every two years. Among HVGs, international travel is nearly universal. Incidence of combining business and leisure travel is low at one in ten among total travellers and one in five among HVGs.

Total United Kingdom | **HVG Audience**



TOTAL U.K.

Intent to travel internationally is significantly higher than the prior year. Currently, intent to take an international holiday (49%) is nearly as high as intent to take a domestic holiday (54%). Interestingly, fewer people plan to take 2+ total trips compared to prior years.

YouGov Global Travel Profiles (United Kingdom) – 2023 Base: Total UK Residents 18+

Base: Long-haul holiday travellers (past 3 years or next 2 years) (n=1532); HVG (n=333)
A6. How often do you typically travel on each of the following types of trips?

+ / − = significantly higher/lower result (vs. Total)

Overall Demand for Long-Haul Holiday Travel

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Total Population 18+		Long-Haul Traveller Incidence Rate		Size of Target Market		HVG		Size of HVG Population
52,156,500	x	30.6%	=	15,960,000	x	21.4%	=	3,415,500

Total United Kingdom | **HVG Audience**

Potential Market Size

Total potential long-haul travellers aged 18 years or more	Target Market for Canada	Immediate Potential for Canada	Total potential HVG travellers aged 18 years or more	HVG Target Market for Canada	HVG Immediate Potential for Canada
15,960,000	**11,794,500**	**4,151,500**	**3,415,500**	**2,575,500**	**1,164,000**
	X 73.9% *Dream to purchase Stage for Canada*	**X 35.2%** *Likely to visit Canada in the next 2 years[1]*		**X 75.4%** *Dream to purchase Stage for Canada*	**X 45.2%** *Likely to visit Canada in the next 2 years[1]*

Base: Target market for Canada = long-haul holiday travellers (past 3 years or next 2 years) (n=1532); Immediate potential for Canada = dream to purchase stages for P2P for Canada (n=1133)

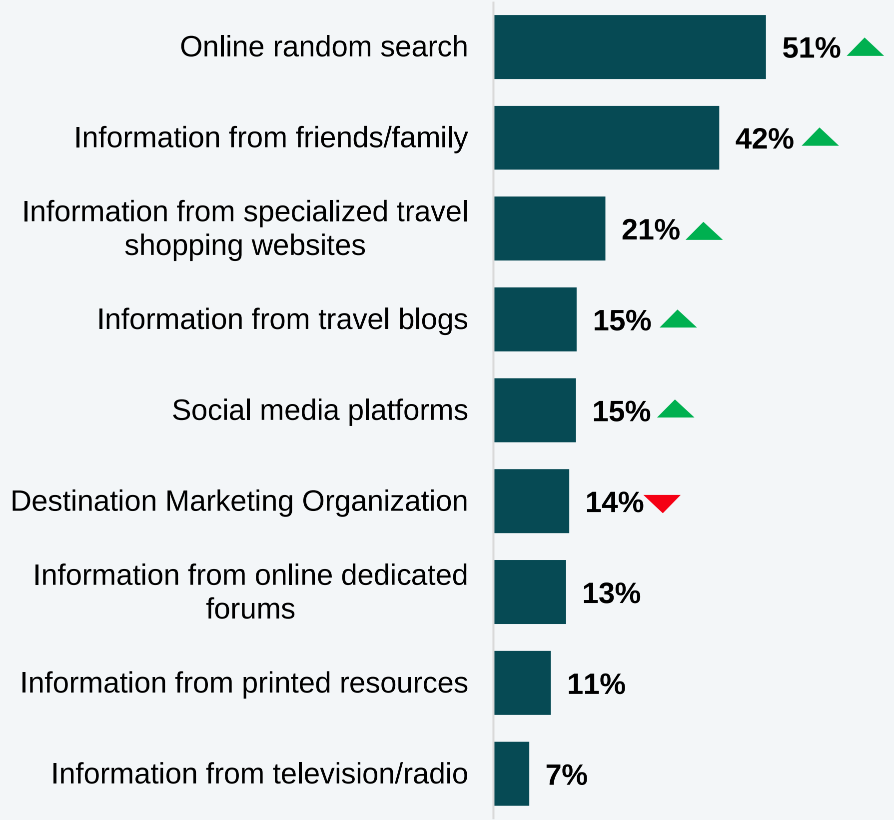
Base: Target market for Canada = long-haul holiday travellers (past 3 years or next 2 years), HVG Audience (n=333); Immediate potential for Canada = dream to purchase stages for P2P for Canada (n=252)

[1] Includes respondents likely to visit Canada for a trip of 1 to 3 nights, or a trip of 4 nights or more.
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)

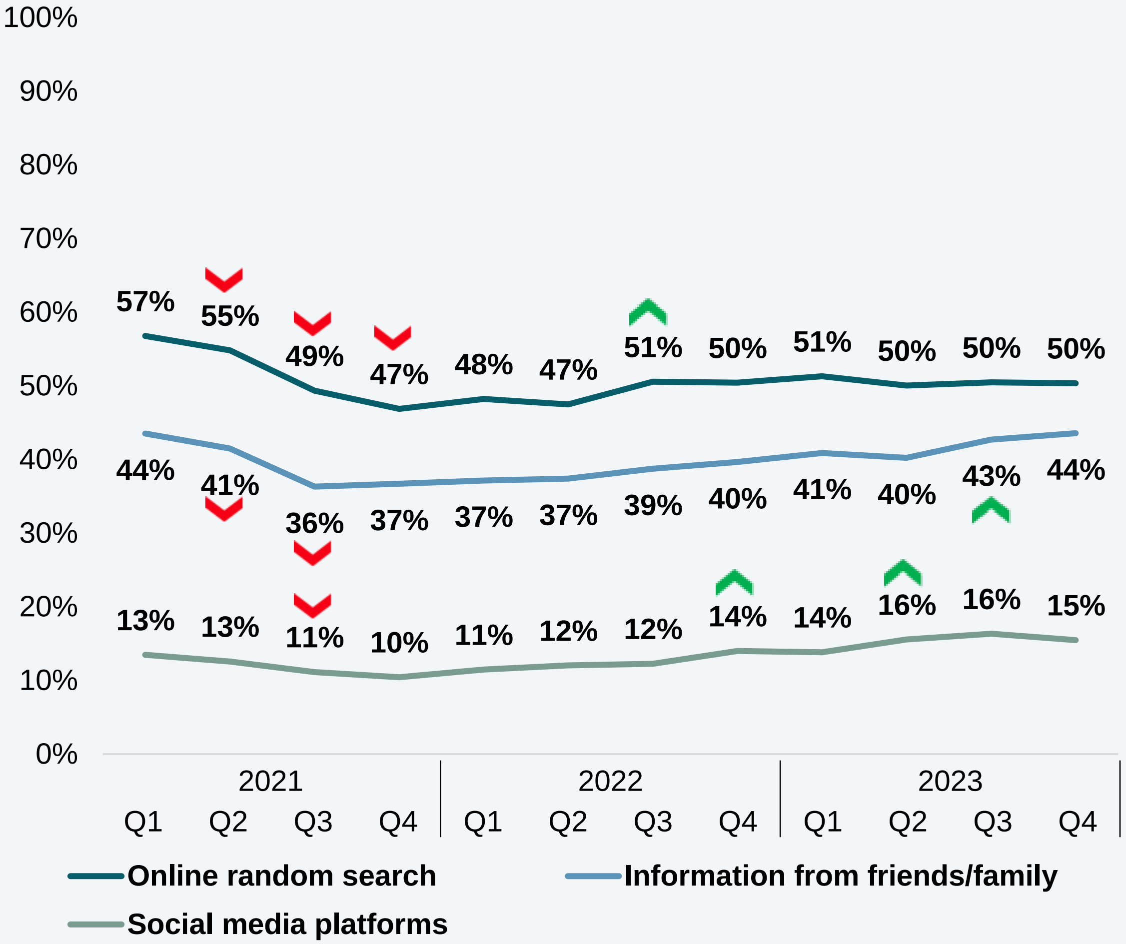
Vacation Planning Methods*

Mentions for many vacation planning methods are up year-over-year with online random searches and information from friends/family topping the list.

Vacation Planning Methods



Select Vacation Planning Methods (Trended)



*2023 Base: UK Residents 18+ (n=26,071)
2021-2023 Quarterly Trending Base Range: UK Residents 18+ (n=6,386-7,219)
Q: Which, if any, of the following methods do you generally use to help plan a vacation? Please select all that apply.

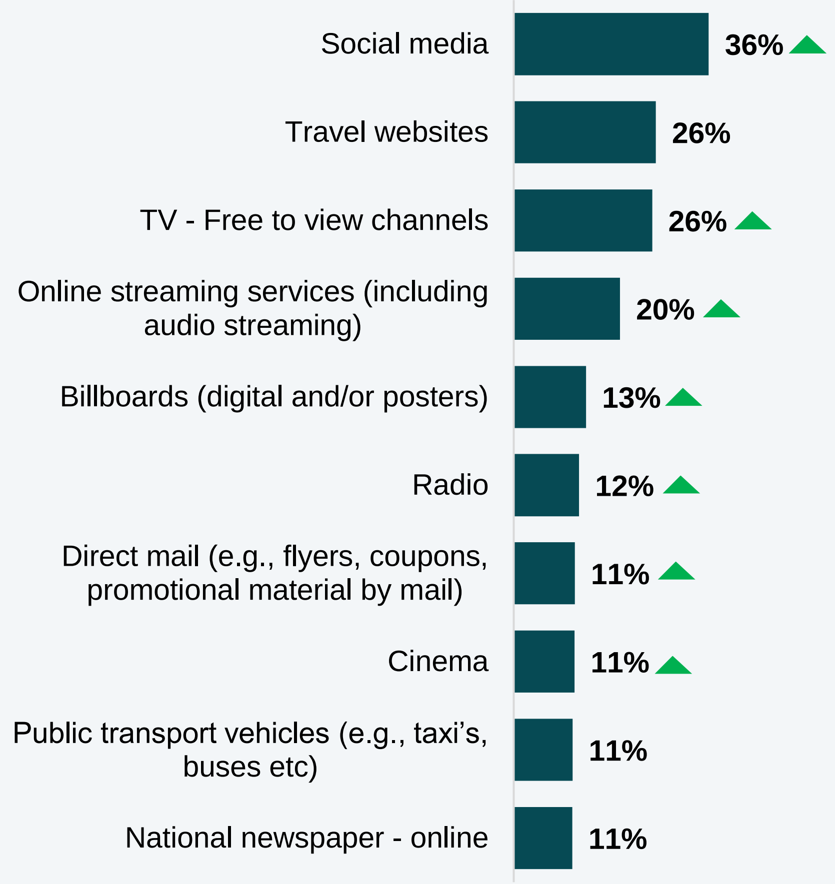
YouGov Global Travel Profiles (United Kingdom) – 2023

/ = significantly higher/lower result (vs. 2022) | / = significantly higher/lower result (vs. previous quarter)

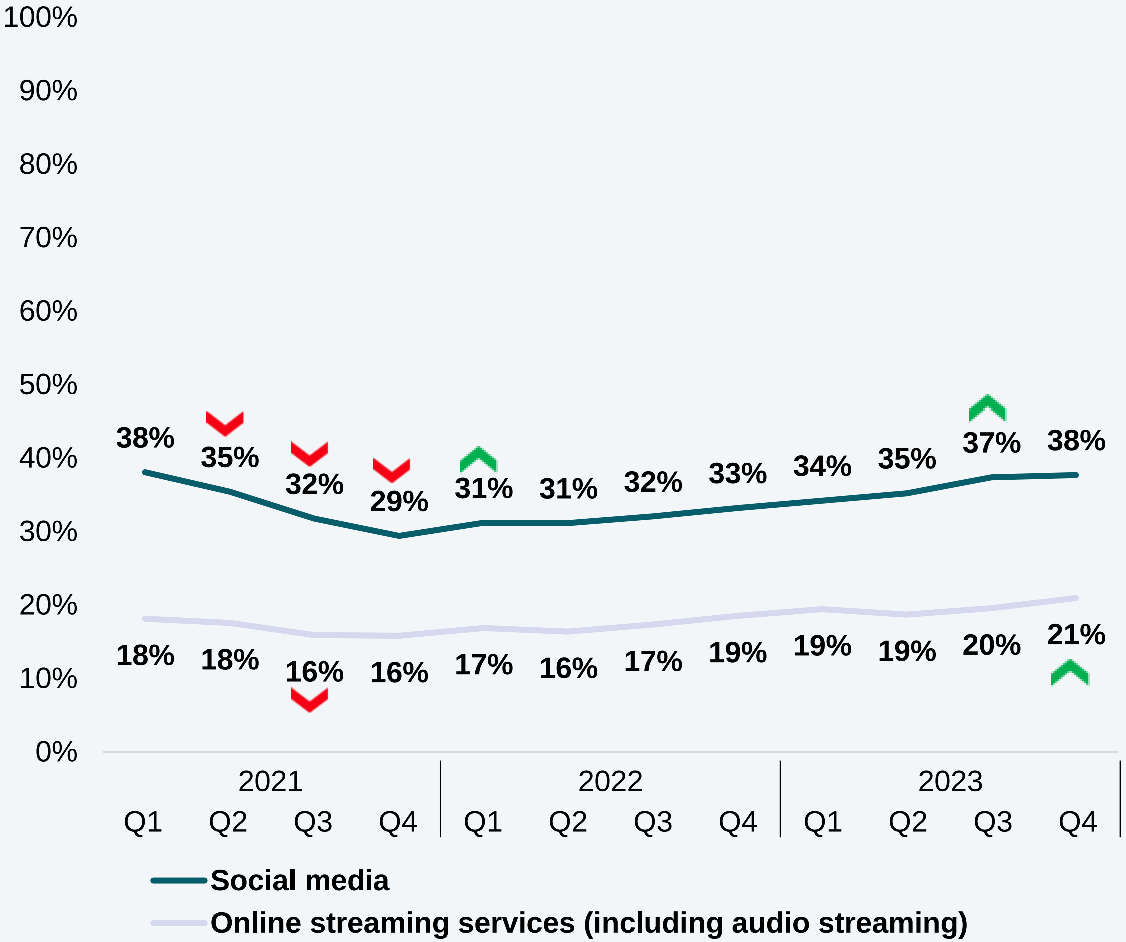
Effective Types of Travel Advertising*

Compared to 2022, Brits highlight more channels as effective in capturing their interest and engagement. While social media receives the most mentions, streaming services show the highest year-over-year growth.

Effective Types of Travel Advertising (Top Responses)



Select Types of Travel Advertising (Trended)



2023 Base: UK Residents 18+ (n=26,071)
2021-2023 Quarterly Trending Base Range: UK Residents 18+ (n=2,446-7,219)
Q: Thinking about your next travel- or vacation-related purchase, if you were a travel/vacation provider where would you advertise to catch your attention? Please select all that apply.

▲ / ▼ = significantly higher/lower result (vs. 2022) | ^ / ˇ = significantly higher/lower result (vs. previous quarter)

Travel Agents/Tour Operator Usage For Recent Trip

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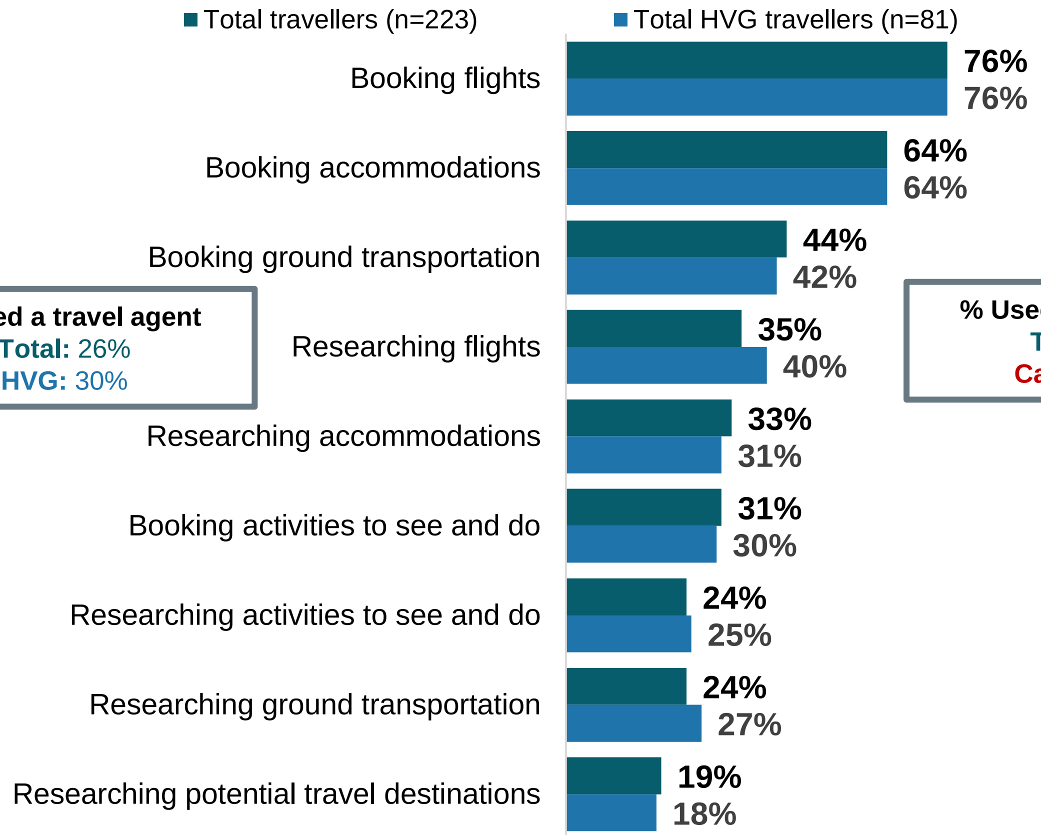
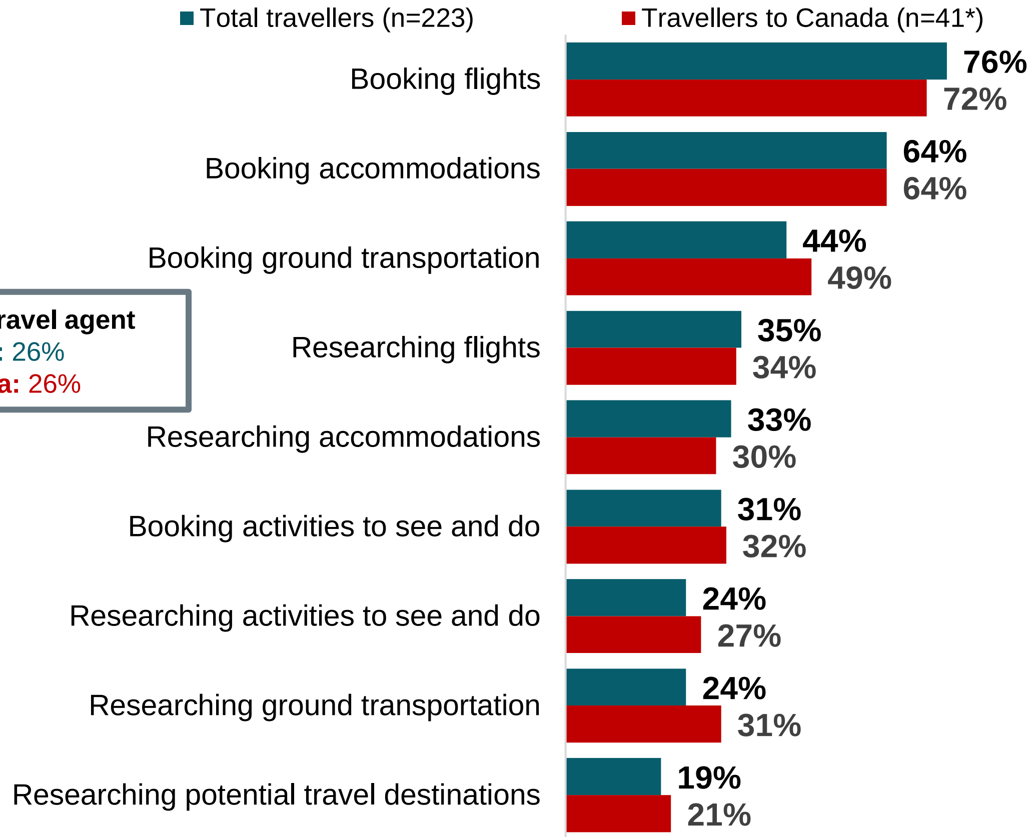
Approximately one-quarter of UK travellers utilize travel agents/tour operators, and they use them primarily for booking flights and accommodations.

Total Travellers to Any Destination vs. HVG Travellers to Any Destination



% Used a travel agent
Total: 26%
HVG: 30%

Total Travellers to Any Destination vs. Total Travellers to Canada



% Used a travel agent
Total: 26%
Canada: 26%

Base: Long-haul holiday travellers (past 3 years or next 2 years), Travelled to any destination, Used a Travel Agent/Tour Operator (n=223); HVG (n=81); Travellers to Canada (n=41*)
F9. Travel agents offer personalized service to help individuals, groups, and business travellers plan and organize their travel schedules, from purchasing tour packages to booking flights and hotels. Examples of travel agents include Trailfinders or Flight Centre, they do not include online booking engines like Expedia or Booking.com. Did you use a travel agent or tour operator to help you research or book your trip? (Select one)
F10. Which of the following did a travel agent or tour operator help you with?
*Small base size, interpret with caution (n<50)

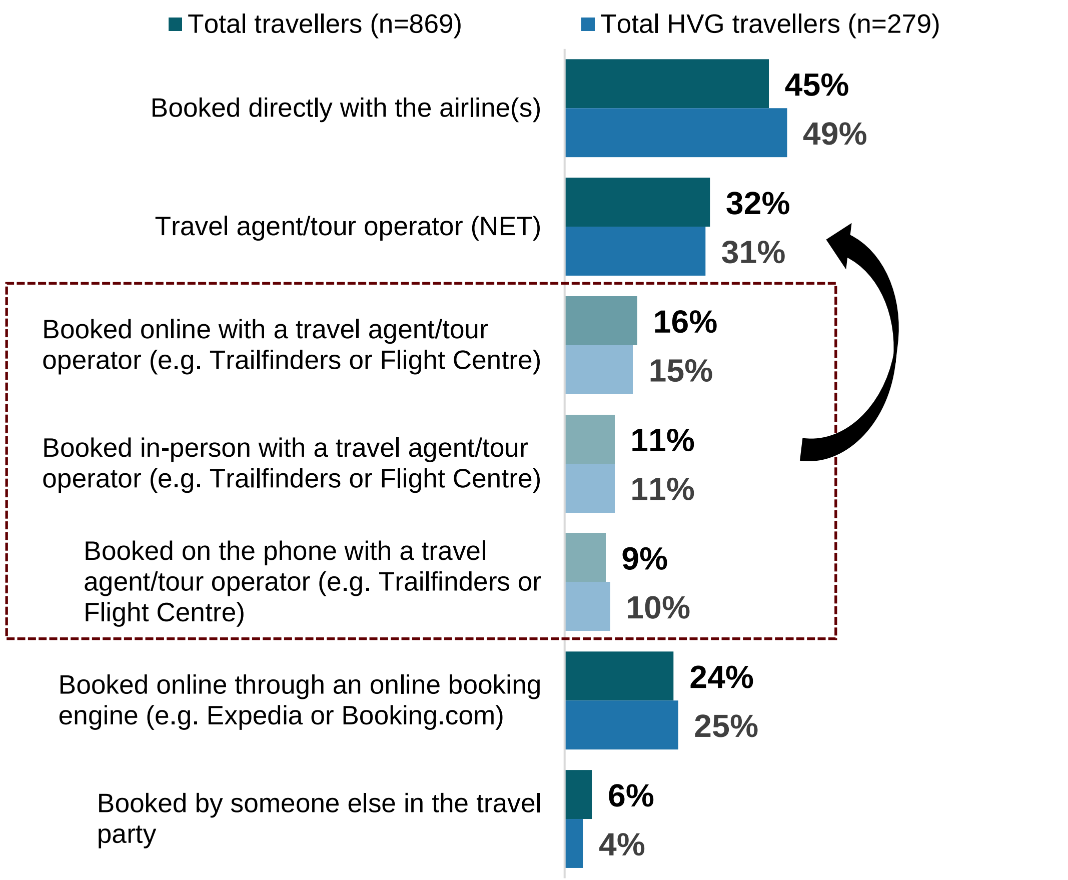
+ / − = significantly higher/lower result (vs. Total)

Booking Flights For Recent Trip

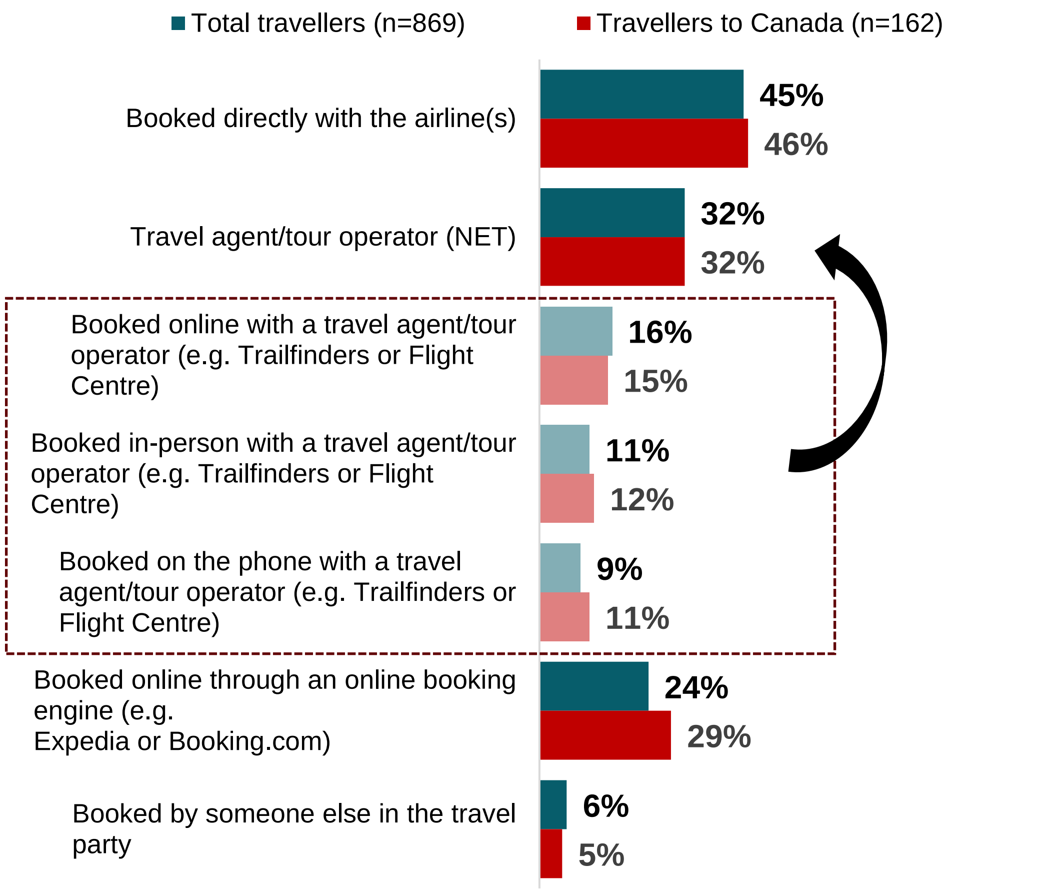
DESTINATION CANADA

Almost half of the flights booked to any destination, including Canada, are done so directly with the airline. The usage of travel agents or tour operators is notably lower, particularly when it comes to in-person and over-the-phone bookings.

Total Travellers to Any Destination vs. HVG Travellers to Any Destination



Total Travellers to Any Destination vs. Total Travellers to Canada



Base: Long-haul holiday travellers (past 3 years or next 2 years), Travelled to any destination (n=869); HVG (n=279); Travellers to Canada (n=162)
F12. How did you book your flight for this trip? (Select all that apply)

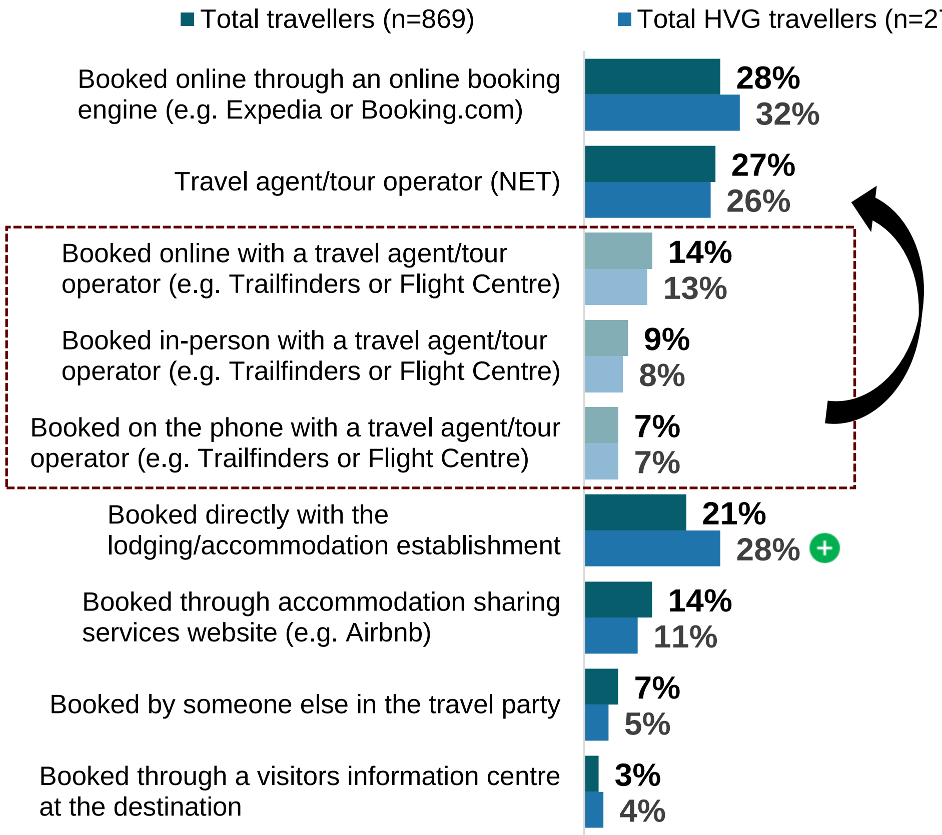
+ / − = significantly higher/lower result (vs. Total)

Booking Accommodations For Recent Trip

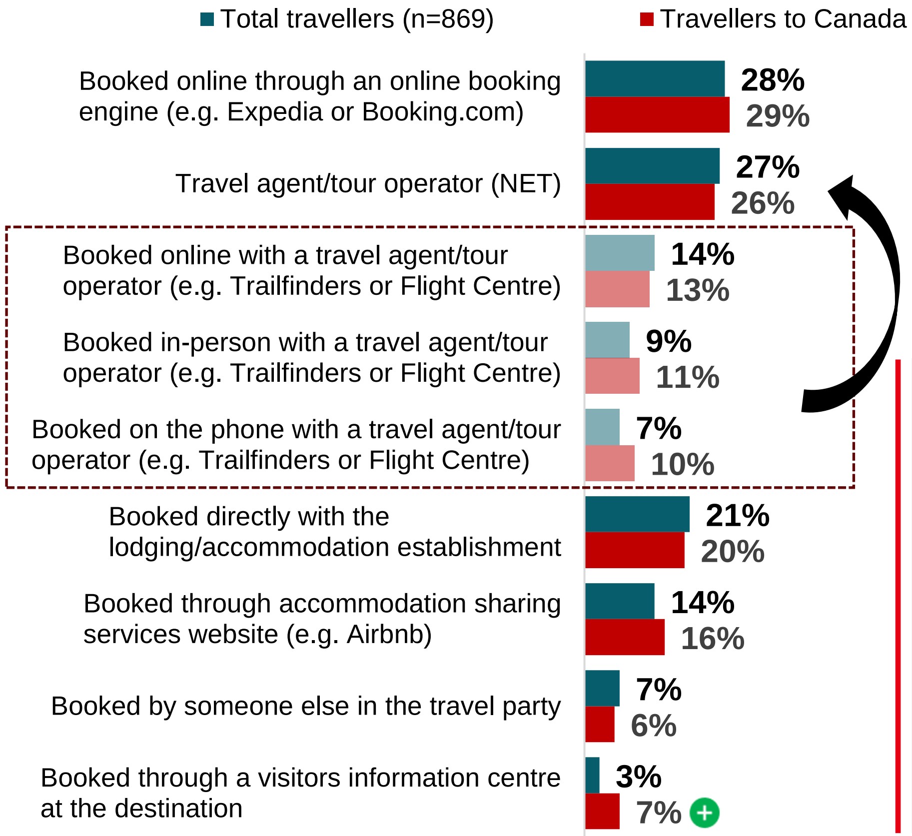
DESTINATION CANADA

When it comes to accommodations, they are booked online through a booking engine just as often as through a travel agent (about three in ten).

Total Travellers to Any Destination vs. HVG Travellers to Any Destination



Total Travellers to Any Destination vs. Total Travellers to Canada



TOTAL U.K.

There's been an uptick over the past two years in booking of accommodations via online websites that primarily offer accommodation as well as tour operators.

YouGov Global Travel Profiles (United Kingdom) – 2023 Base: Total UK Residents 18+

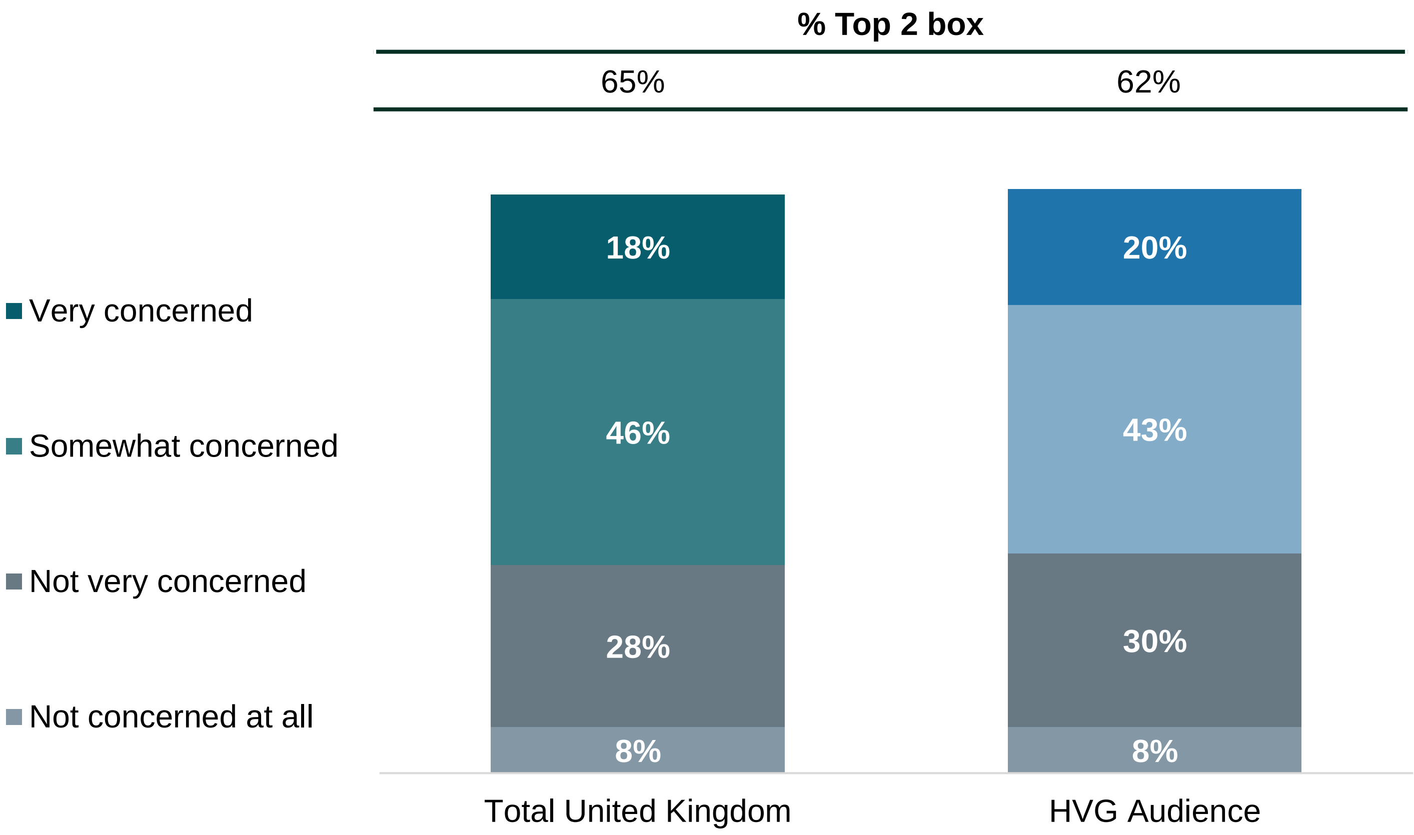
Base: Long-haul holiday travellers (past 3 years or next 2 years), Travelled to any destination (n=869); HVG (n=279); Travellers to Canada (n=162)
F13. How did you book your accommodation for this trip? (Select all that apply)

+ / − = significantly higher/lower result (vs. Total)

Impact of Extreme Weather Events on Travel Plans

DESTINATION CANADA

About two-thirds of UK travellers have concerns about extreme weather events, overall and amongst the HVG audience. This concern has not changed or cancelled plans on a major level, with only about one in ten in the last three years.



	Total United Kingdom	HVG Audience
% Yes Changed/Cancelled Plans in P3Y Due to Extreme Weather Events	12%	14%

Extreme Weather Events Description

As you may or may not be aware, extreme weather events are occurrences of unusually severe weather or climate conditions. They are often short-lived and include blizzards, heat waves, wildfires, tornadoes, hurricanes or tropical cyclones.

Note: respondents were asked either about extreme weather events (D10/D11) or international conflicts & unrest (D12/D13)
Base: Long-haul holiday travellers (past 3 years or next 2 years) (n=771); HVG (n=170)
D10. [DESCRIPTION] How concerned are you about extreme weather events affecting your travel plans?
D11. In the past 3 years, have you ever had to change plans or cancel a trip due to extreme weather events?

+ / − = significantly higher/lower result (vs. Total)

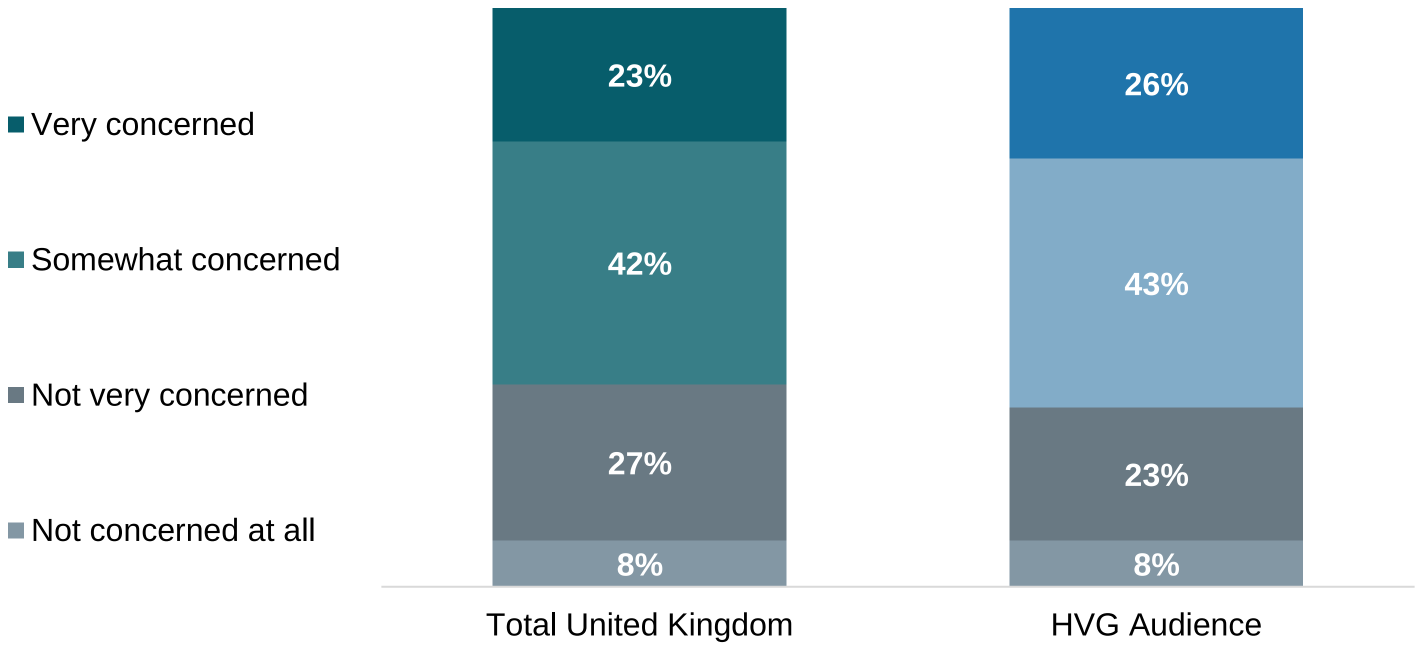
Impact of International Conflicts & Unrest on Travel Plans

DESTINATION CANADA

When it comes to international conflict, concerns are similar, with about two-thirds of travellers concerned and only one in ten changing plans due to conflict in the past three years.

% Top 2 box

Total United Kingdom	HVG Audience
65%	69%



	Total United Kingdom	HVG Audience
% Yes Changed/Cancelled Plans in P3Y Due to International Conflicts	11%	15% (+)

International Conflicts Description

As you may or may not be aware, international conflicts and unrest are currently occurring in different regions around the world.

Note: respondents were asked either about extreme weather events (D10/D11) or international conflicts & unrest (D12/D13)
Base: Long-haul holiday travellers (past 3 years or next 2 years) (n=761); HVG (n=163)
D12. [DESCRIPTION] How concerned are you about international conflicts or unrest affecting your travel plans?
D13. In the past 3 years, have you ever had to change plans or cancel a trip due to international conflicts or unrest?

(+) / (−) = significantly higher/lower result (vs. Total)

Canada vs. Competitive Destinations

Past Visitation

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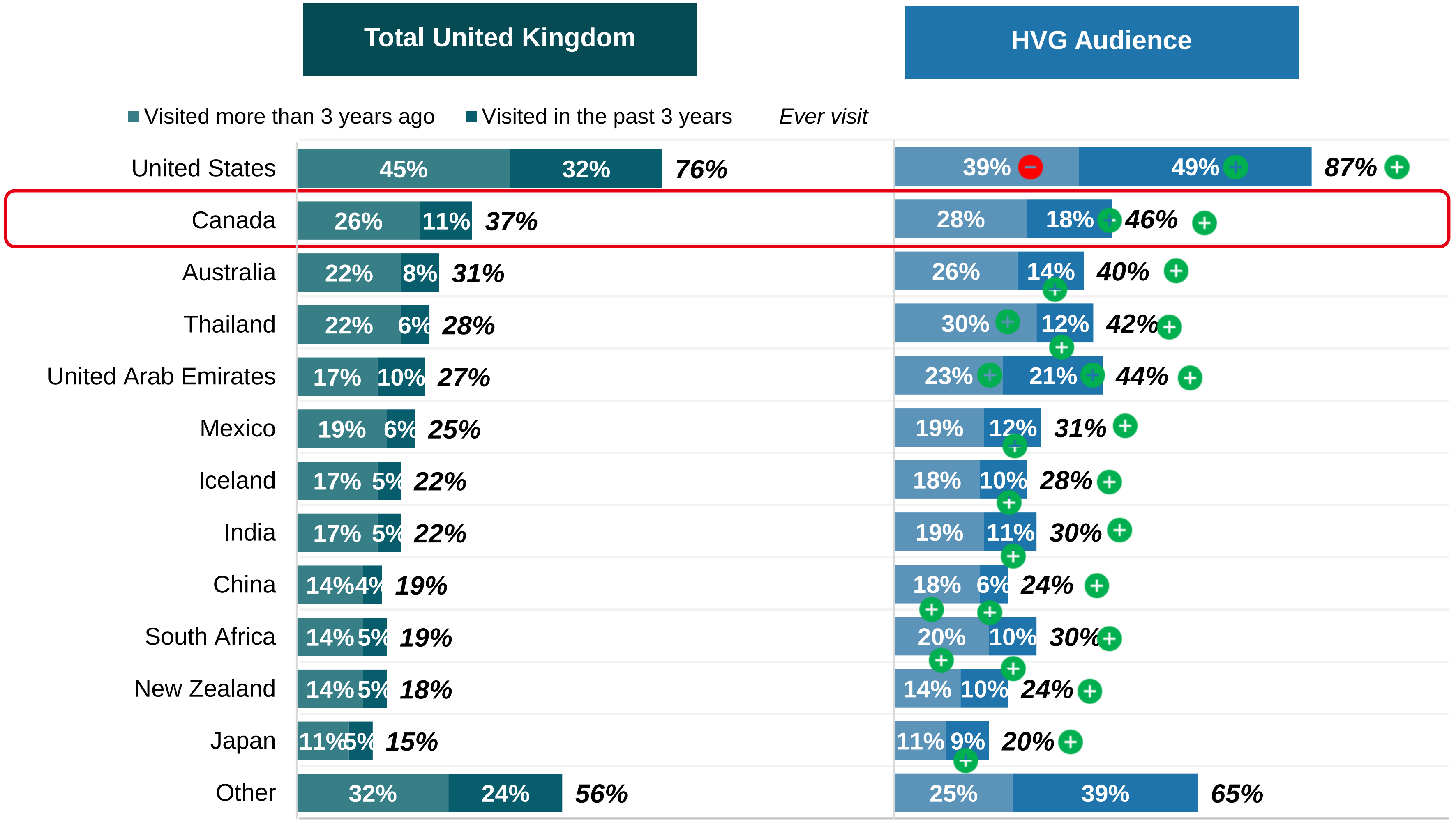
Canada ranks second in terms of destinations ever visited, about half the rate of the US. Of note, HVGs are more likely to have visited Canada as well as all other destinations in the competitive set.



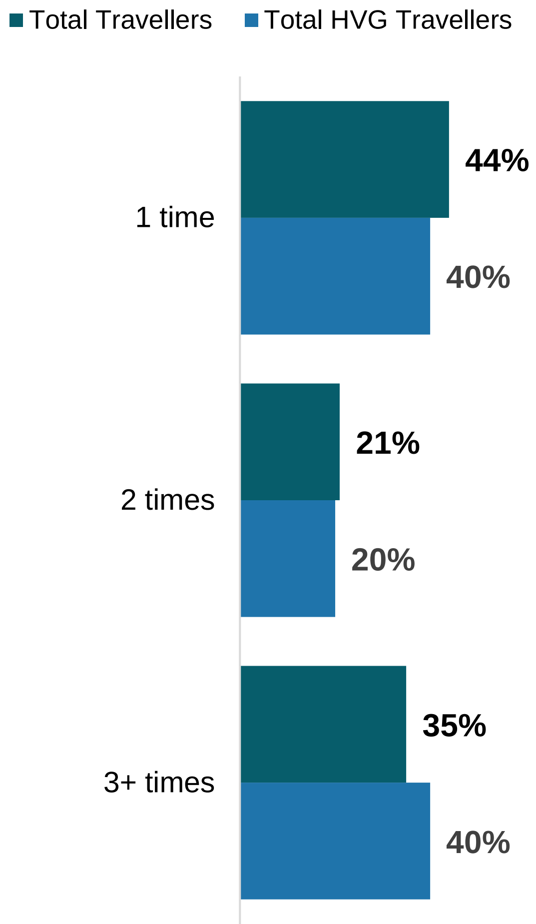
Base: Long-haul holiday travellers (past 3 years or next 2 years) (n=1532); HVG (n=333)
B5. Which of the following countries or regions have you visited while on a holiday trip **outside of Europe, North Africa and the Mediterranean** which was 4 or more nights long?

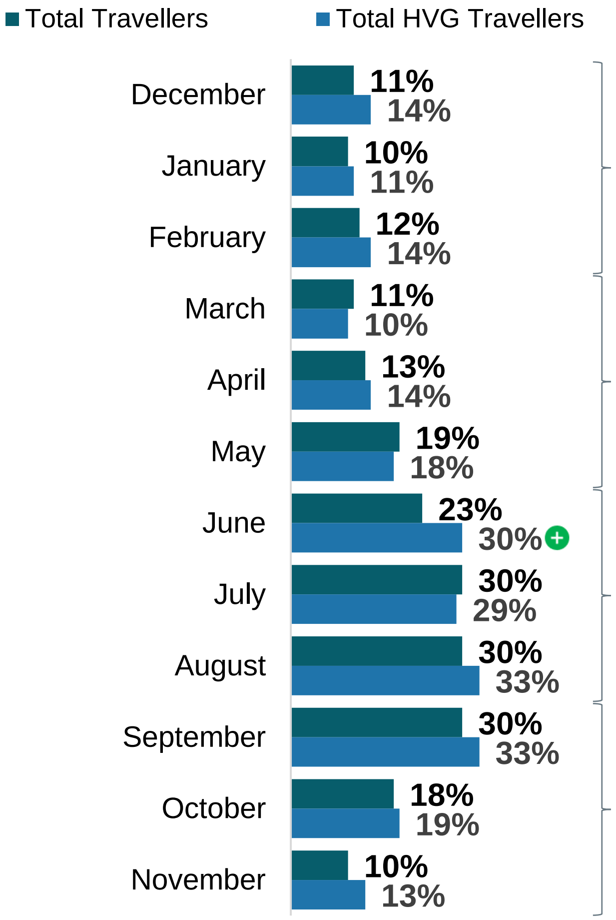
+ / − = significantly higher/lower result (vs. Total)

Number of Visits Ever & Time of Year Visited Canada

DESTINATION CANADA

More than one half of UK travellers who have been to Canada have visited more than once. The majority of the visits were in the Summer, followed by the Fall.





	Total Travellers	Total HVG Travellers
Winter	22%	26%
Spring	30%	26%
Summer	57%	58%
Fall	39%	45%

Base: Long-haul holiday travellers (past 3 years or next 2 years)
F19. Approximately, how many times have you been to Canada? Ever Visited Canada (excluding None) (n=509); HVG (n=135)
F20. What time of year have you ever visited Canada? Select all that apply. Visited Canada (n=568); HVG (n=154)

+ / − = significantly higher/lower result (vs. Total)

Net Promoter Score (NPS)

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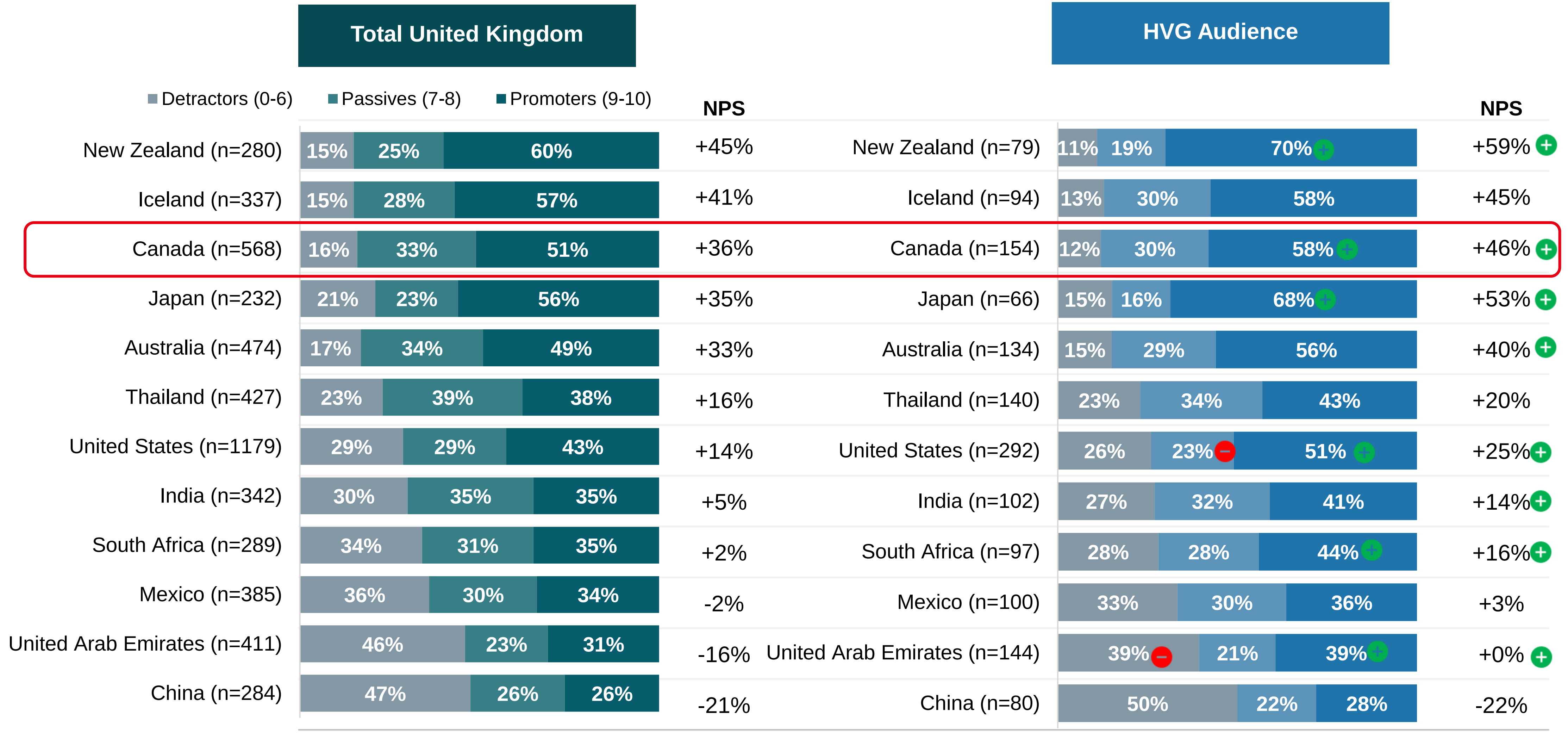
Canada ranks third on NPS, following New Zealand and Iceland; among HVGs, Canada is also third, but behind New Zealand and Japan. Despite high visitation to the US, the country ranks just 7th in terms of NPS scores.

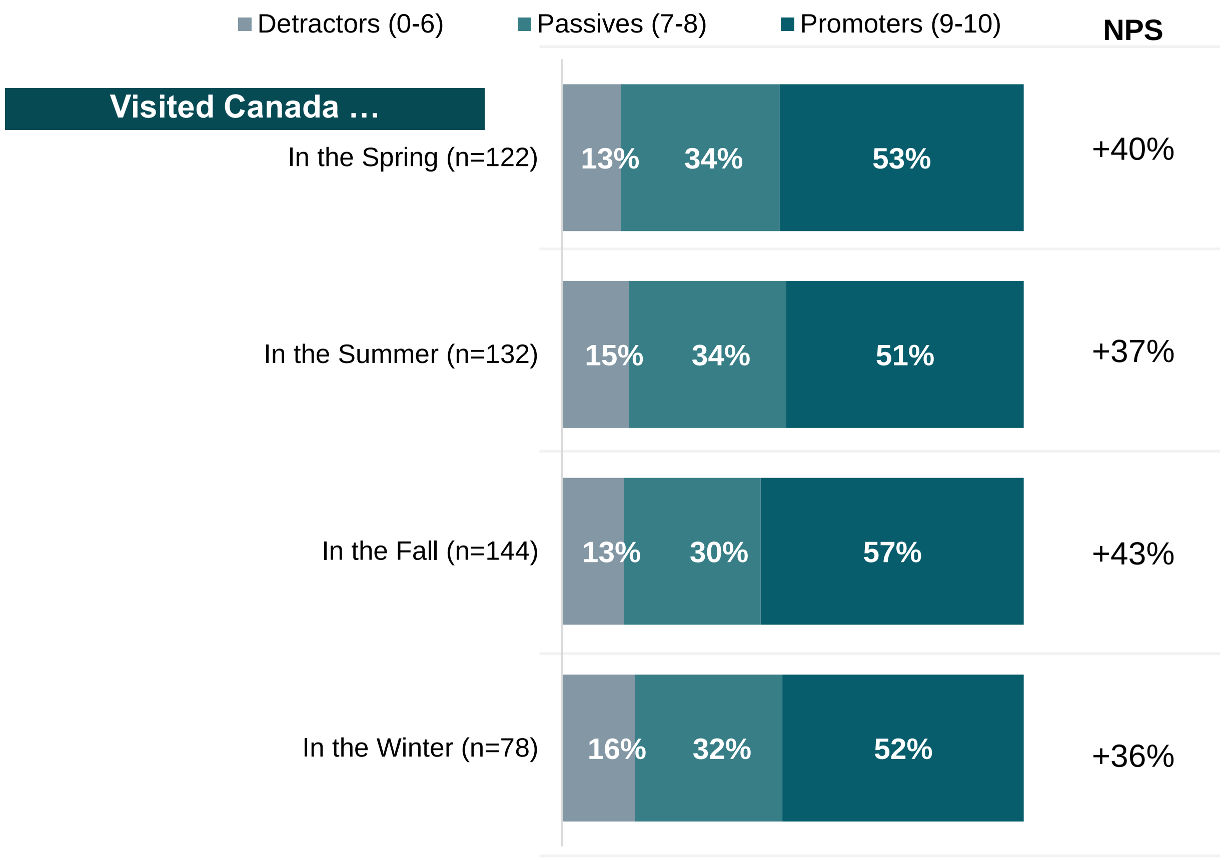


Note: all respondents evaluated countries they have ever visited from the competitive set.
Base: Long-haul holiday travellers (past 3 years or next 2 years), Visited [DESTINATION]
C8. How likely are you to recommend each of the following holiday destinations to a friend, family member or colleague?

+ / − = significantly higher/lower result (vs. Total)

Canada Net Promoter Score (NPS) by Season

Canada has high NPS scores regardless of season visited.



Note: all respondents evaluated countries they have ever visited from the competitive set.
Base: Long-haul holiday travellers (past 3 years or next 2 years), Visited **Canada**
C8. How likely are you to recommend each of the following holiday destinations to a friend, family member or colleague?
F20. What time of year have you ever visited Canada? Select all that apply.

+ / − = significantly higher/lower result (vs. Total)

Performance Scorecard for Canada

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Among Total Brits, Canada performed well in the UK market in 2023, ranking 1st (out of 9 destinations) in two of eight key performance metrics and in the top three in all eight metrics. Scores also increased in three metrics, most notably consideration.

Total Impression	Consideration	Positive Recommend	Destination Health Index
56%	19% ▲	26%	31%
Ranks 1st *(out of 9)*	Ranks 2nd *(out of 9)* (Behind: US)	Ranks 2nd *(out of 9)* (Behind: US)	Ranks 1st *(out of 9)*

Positive Reputation	Positive Buzz	Ad Awareness	Word of Mouth
43%	12%	4% ▲	11% ▲
Ranks 2nd *(out of 9)* (Behind: AU)	Ranks 2nd *(out of 9)* (Behind: AU)	Ranks 3rd *(out of 9)* (Behind: US, AU)	Ranks 3rd *(out of 9)* (Behind: US, AU)

TOTAL U.K.
Competitive set: US, Iceland, Japan, Australia, Thailand, Mexico, India, China

YouGov DestinationIndex (United Kingdom) – 2023

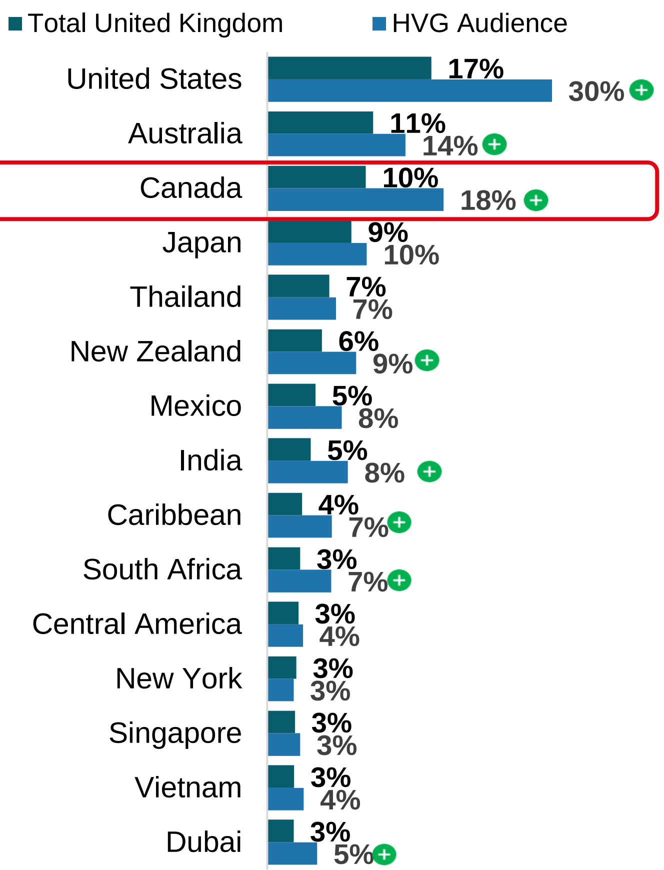
Base: UK Residents 18+ (n=17,967)

▲ / ▼ = significantly higher/lower result (vs. 2022)

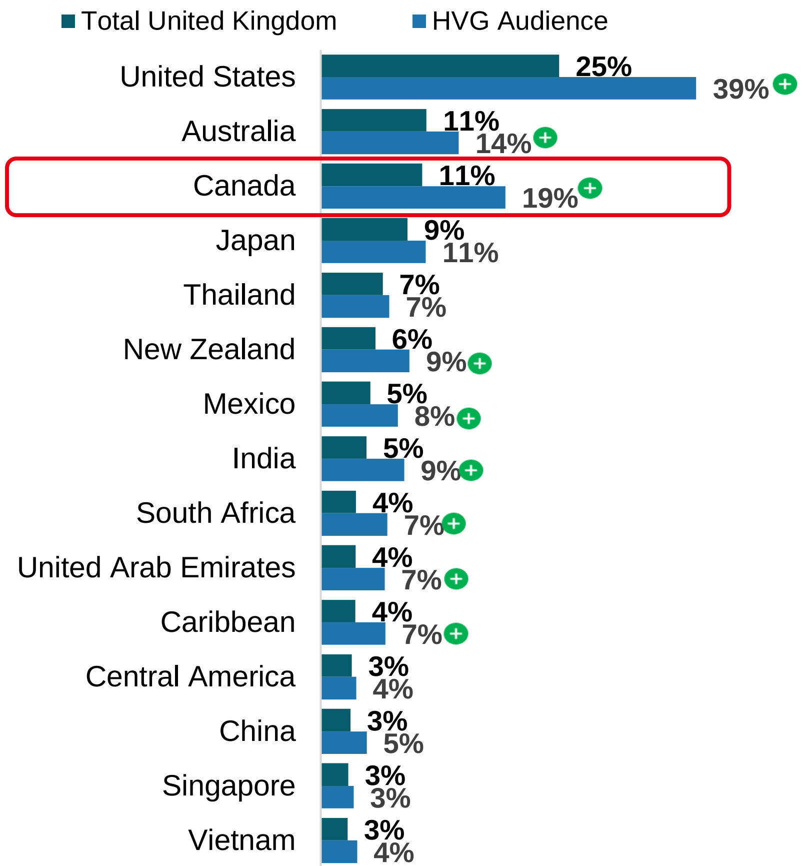
Unaided Long-Haul Destination Consideration (Next 2 Years)

Canada has a significant share in the UK traveller's mind when it comes to next two-year destination considerations, ranking 3rd overall and 2nd amongst the HVG audience.

Top Destination Brands[1]



Top Destinations[2]

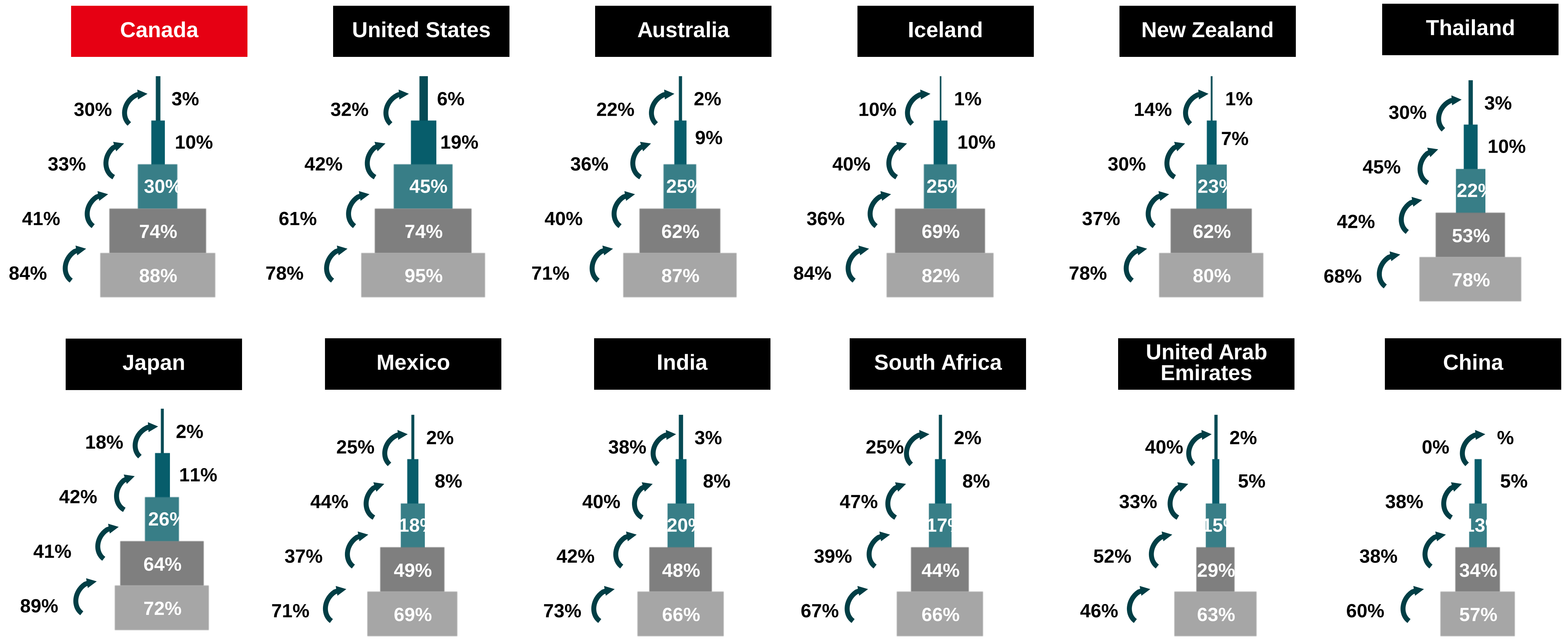


[1] Responses as mentioned by respondents (e.g., percentage who said "Canada" specifically).
[2] Roll-up of brand mentions by country (e.g., percentage who said "Canada" or any destination in Canada).
Base: Long-haul holiday travellers (past 3 years or next 2 years) (n=1532); HVG (n=333)
B1. You mentioned that you are likely to take a long-haul holiday trip in the next 2 years. Which destinations are you seriously considering? (Please list up to 3 destinations)

+ / − = significantly higher/lower result (vs. Total)

Consideration Funnels: Total United Kingdom Travellers

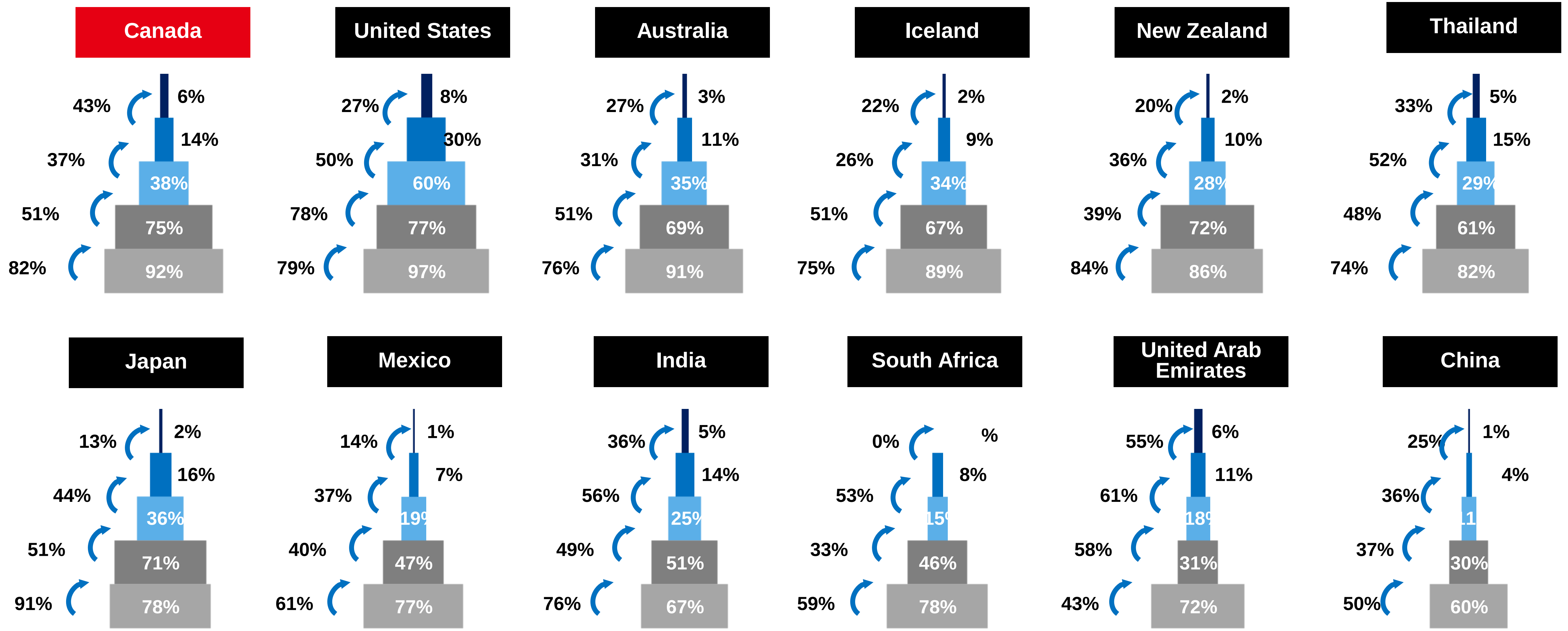
Three in ten UK travellers are seriously considering visiting Canada in the next two years. The US has about double the proportion of those actively planning and committed to visiting, as a result of stronger conversion rates starting at interest to consideration.



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

Consideration Funnels: Among HVG Audience

Amongst the HVG audience, Canada has healthier conversion rates, but still trails the US significantly on converting general interest to consideration.



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

Destination Consideration By Seasons

Canada has the highest consideration in the Summer and Fall, while Australia leads in the Winter and Japan in the Spring. Among HVGs, consideration for the Fall has stronger competition.

Total United Kingdom	Winter (Dec, Jan, Feb)	Spring (Mar, Apr, May)	Summer (Jun, Jul, Aug)	Fall (Sept, Oct, Nov)
Australia (n=256)	53%	43%	32%	47%
Canada (n=1133)	23%	41%	56%	51%
China (n=139)	20%	42%	35%	37%
Iceland (n=289)	42%	44%	43%	49%
India (n=195)	38%	36%	23%	37%
Japan (n=266)	21%	51%	41%	40%
Mexico (n=201)	28%	39%	42%	38%
New Zealand (n=264)	47%	44%	25%	43%
South Africa (n=185)	34%	41%	30%	39%
Thailand (n=215)	44%	47%	37%	43%
United Arab Emirates (n=122)	35%	44%	24%	37%
United States (n=322)	29%	44%	49%	49%

HVG Audience	Winter (Dec, Jan, Feb)	Spring (Mar, Apr, May)	Summer (Jun, Jul, Aug)	Fall (Sept, Oct, Nov)
Australia (n=62)	64%	56% +	27%	56%
Canada (n=252)	25%	43%	65% +	55%
China (n=32*)	21%	47%	28%	46%
Iceland (n=60)	40%	37%	48%	42%
India (n=45*)	55% +	39%	19%	54% +
Japan (n=59)	25%	61%	34%	45%
Mexico (n=41*)	33%	50%	31%	30%
New Zealand (n=66)	52%	54%	22%	58% +
South Africa (n=42*)	38%	59% +	36%	48%
Thailand (n=55)	53%	53%	44%	44%
United Arab Emirates (n=27*)	48%	52%	33%	45%
United States (n=69)	38%	52%	55%	52%

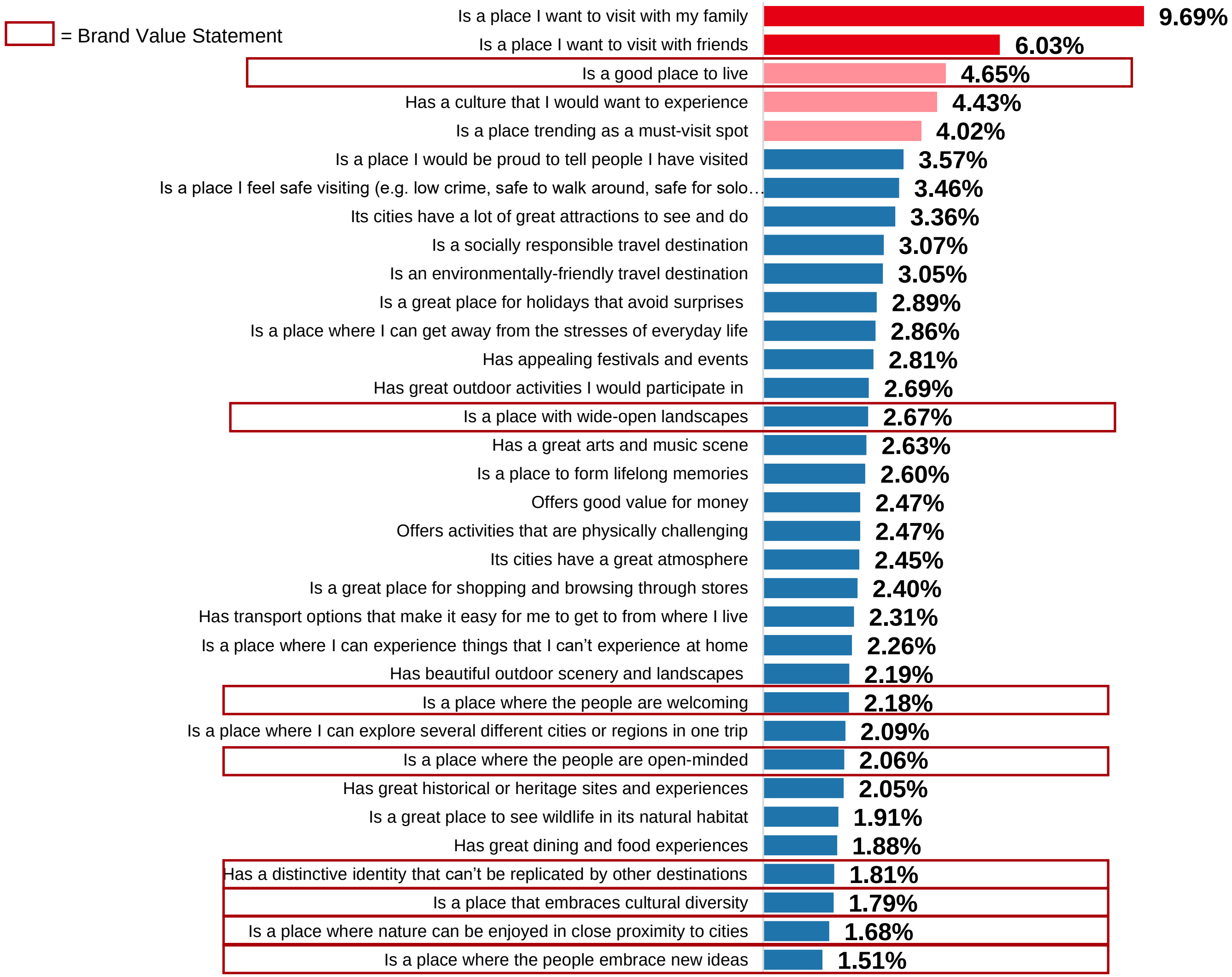
Note: all respondents evaluated Canada plus 3 randomly selected countries from the competitive set.
Base: Long-haul holiday travellers (past 3 years or next 2 years), Those in the dream to purchase stages of the path to purchase for [DESTINATON]
C7. For each of the following destinations, during which months would you consider taking a holiday trip <u>in the next 2 years</u>?
*Small base size, interpret with caution (n<50)

+ / − = significantly higher/lower result (vs. Total)

Destination Attributes: Drivers Analysis

DESTINATION CANADA

The most influential aspects of consideration are being a place to visit with family/ friends, having an experiential culture, being a good place to live (one of Canada's value statements) and trending as a must-visit destination.



<u>Description</u>

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.

<u>Interpretation</u>

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 holiday travellers (past 3 years or next 2 years)
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: Among Total United Kingdom

Canada stands out as being a place I feel safe visiting and a place that avoids surprises. Perceptions of Canada are weak on several dimensions but it's worth noting that no single destination owns the key drivers of a place to visit with family and friends.

		Canada	Australia	China	Iceland	India	Japan	Mexico	New Zealand	South Africa	Thailand	United Arab Emirates	United States
	n=	1532	412	412	418	407	419	411	421	421	409	429	437
Higher Order Motivations	Is a place where I can get away from the stresses of everyday life			Weakness	Strength								Weakness
	Is a place to form lifelong memories												
	Is a place I would be proud to tell people I have visited												
General Needs	Is a place I feel safe visiting (e.g. low crime, safe to walk around, safe for solo travel etc.)	Strength	Strength		Strength	Weakness	Strength	Weakness	Strength	Weakness	Weakness		Weakness
	Is a place where I can explore several different cities or regions in one trip			Strength	Weakness							Weakness	Strength
	Offers good value for money	Weakness	Weakness		Weakness	Strength	Weakness	Strength	Weakness		Strength		
	Has transport options that make it easy for me to get to from where I live								Weakness			Strength	Strength
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	Strength		Weakness		Weakness				Weakness		Strength	Strength
	Is a place where I can experience things that I can't experience at home	Weakness	Weakness	Strength					Weakness	Strength		Strength	Weakness
	Is an environmentally-friendly travel destination				Strength	Weakness		Weakness	Strength				Weakness
	Is a socially responsible travel destination			Weakness	Strength	Weakness			Strength				
	Is a place trending as a must-visit spot	Weakness			Strength		Strength					Strength	
To-Do	Offers activities that are physically challenging						Weakness			Strength			
	Is a great place for shopping and browsing through stores				Weakness			Weakness	Weakness	Weakness		Strength	Strength
	Its cities have a lot of great attractions to see and do			Strength	Weakness		Strength		Weakness				Strength
	Has great outdoor activities I would participate in			Weakness	Strength	Weakness	Weakness						
	Has great dining and food experiences	Weakness	Weakness		Weakness	Strength	Strength	Strength	Weakness		Strength	Strength	
	Has a great arts and music scene				Weakness			Strength					Strength
	Has appealing festivals and events	Weakness			Weakness	Strength		Strength	Weakness			Weakness	Strength
To-See	Its cities have a great atmosphere				Weakness		Strength						Strength
	Has beautiful outdoor scenery and landscapes									Strength		Weakness	
	Is a great place to see wildlife in its natural habitat		Strength				Weakness			Strength		Weakness	
	Has great historical or heritage sites and experiences	Weakness	Weakness	Strength	Weakness	Strength	Strength	Strength	Weakness			Weakness	Weakness
	Has a culture that I would want to experience	Weakness	Weakness	Strength			Strength	Strength					Weakness

Strength | Weakness

Note: all respondents evaluated Canada plus 3 randomly selected countries from the competitive set.
Base: Long-haul holiday travellers (past 3 years or next 2 years), 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: Among Total United Kingdom

When it comes to brand value statements, Canada dominates in four areas including: embraces cultural diversity, embraces new ideas, open-minded people, and being a good place to live. New Zealand and Australia share several of Canada's competitive strengths.

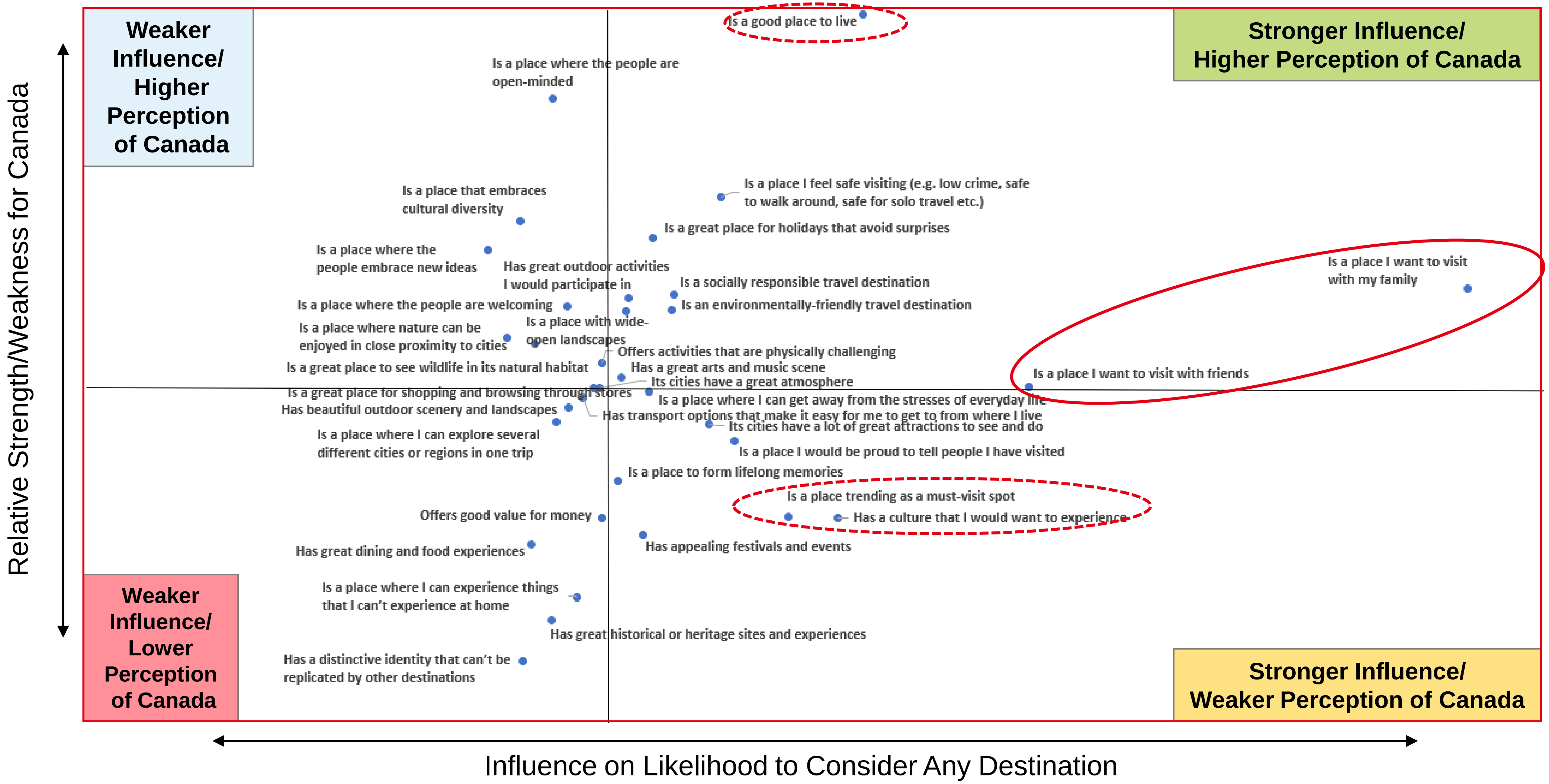
	Canada	Australia	China	Iceland	India	Japan	Mexico	New Zealand	South Africa	Thailand	United Arab Emirates	United States
n=	1532	412	412	418	407	419	411	421	421	409	429	437
Is a place with wide-open landscapes		Strength				Weakness			Strength	Weakness		
Is a place where nature can be enjoyed in close proximity to cities			Weakness					Strength	Strength		Weakness	
Is a place that embraces cultural diversity	Strength		Weakness			Weakness		Strength				
Is a place where the people are welcoming			Weakness									
Is a place where the people are open-minded	Strength	Strength	Weakness	Strength	Weakness	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				Weakness

Strength | Weakness

Note: all respondents evaluated Canada plus 3 randomly selected countries from the competitive set.
Base: Long-haul holiday travellers (past 3 years or next 2 years), 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.

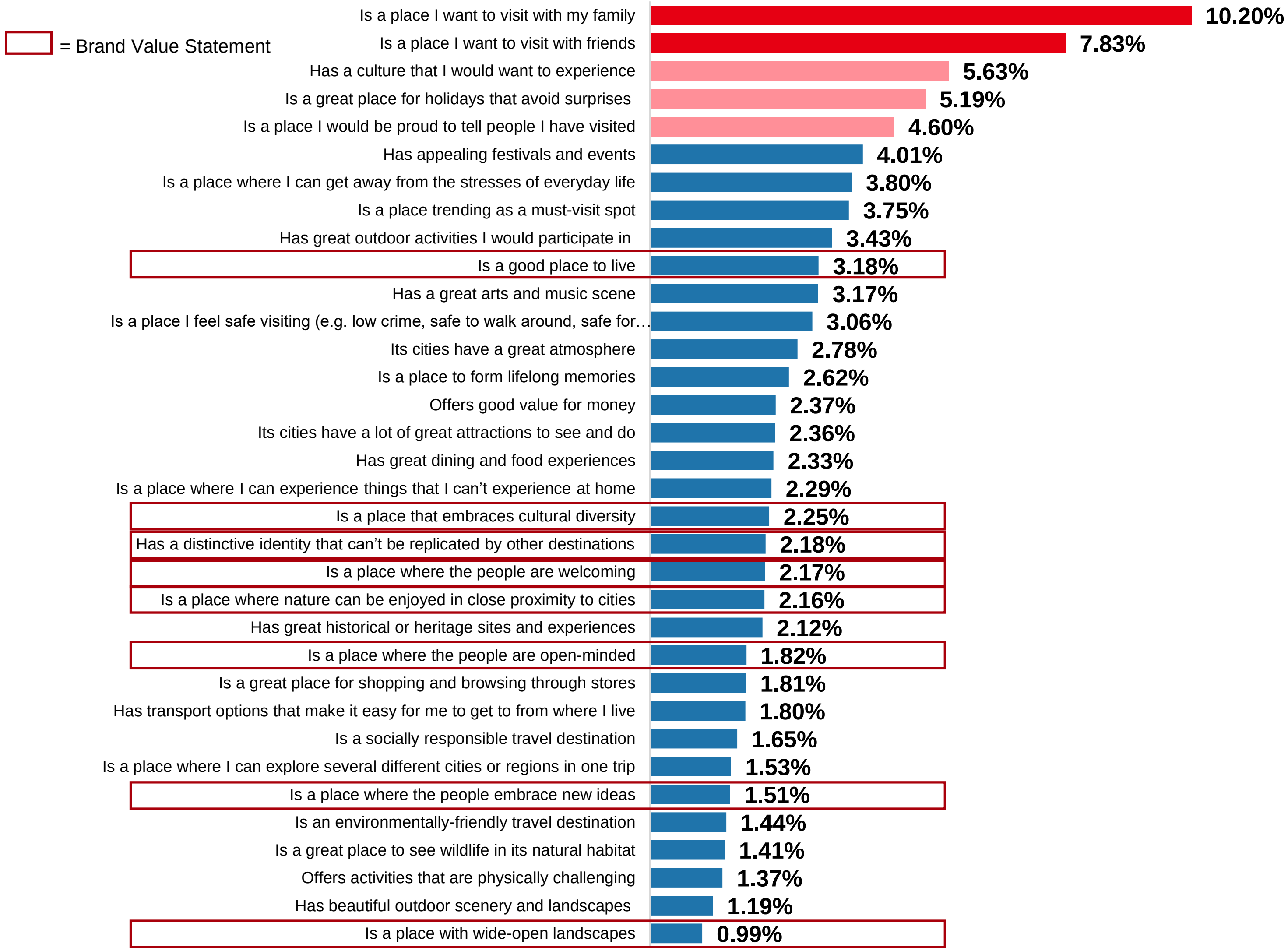
Canada Strengths & Opportunities: Total UK

While Canada is strongly associated with being a good place to live, there's an opportunity to drive consideration to visit by boosting perceptions of: a place to visit with friends, cultural experiences and a trending must-visit spot.



Destination Attributes: Drivers Analysis: Among HVG Audience

Top drivers for HVGs are similar to overall, including: visiting with family and friends. Additionally, having a culture I want to experience, avoiding surprises and proud to tell people are amongst the top drivers for the HVG audience.



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 holiday travellers, HVG audience, (past 3 years or next 2 years)
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 : Among HVG Audience

DESTINATION CANADA

When it comes to strengths and weaknesses among HVGs, Canada is perceived as a safe place to visit and a place to avoid surprises. Similar to total travellers, there is white space around being a place to visit with family and is a place I would be proud to tell people I have visited. Of note, the US currently owns place I want to visit with friends, which is a top driver.

		Canada	Australia	China	Iceland	India	Japan	Mexico	New Zealand	South Africa	Thailand	United Arab Emirates	United States
	n=	333	91	107	89	89	83	87	91	91	91	90	90
Higher Order Motivations	Is a place where I can get away from the stresses of everyday life			Weakness							Strength		Weakness
	Is a place to form lifelong memories												
	Is a place I would be proud to tell people I have visited												Weakness
General Needs	Is a place I feel safe visiting (e.g. low crime, safe to walk around, safe for solo travel etc.)	Strength			Strength	Weakness	Strength	Weakness	Strength	Weakness	Weakness	Strength	
	Is a place where I can explore several different cities or regions in one trip			Strength	Weakness							Weakness	
	Offers good value for money	Weakness	Weakness		Weakness	Strength	Weakness	Strength	Weakness		Strength		
	Has transport options that make it easy for me to get to from where I live								Weakness			Strength	
Type of Trip	Is a place I want to visit with friends			Weakness									Strength
	Is a place I want to visit with my family												
	Is a great place for holidays that avoid surprises	Strength		Weakness	Strength	Weakness				Weakness		Strength	
	Is a place where I can experience things that I can't experience at home	Weakness	Weakness	Strength						Strength		Strength	Weakness
	Is an environmentally-friendly travel destination			Weakness	Strength	Weakness		Weakness	Strength	Weakness	Weakness		
	Is a socially responsible travel destination			Weakness	Strength	Weakness		Weakness	Strength	Weakness	Weakness		
	Is a place trending as a must-visit spot	Weakness			Strength		Strength			Weakness		Strength	
To-Do	Offers activities that are physically challenging		Strength		Strength		Weakness			Strength			
	Is a great place for shopping and browsing through stores				Weakness			Weakness	Weakness	Weakness		Strength	Strength
	Its cities have a lot of great attractions to see and do			Strength	Weakness		Strength		Weakness				Strength
	Has great outdoor activities I would participate in		Strength	Weakness	Strength	Weakness	Weakness	Weakness		Strength			
	Has great dining and food experiences	Weakness			Weakness	Strength		Strength	Weakness		Strength	Strength	
	Has a great arts and music scene				Weakness			Strength			Weakness		Strength
	Has appealing festivals and events	Weakness			Weakness	Strength		Strength				Weakness	
To-See	Its cities have a great atmosphere				Weakness		Strength						Strength
	Has beautiful outdoor scenery and landscapes									Strength		Weakness	
	Is a great place to see wildlife in its natural habitat		Strength				Weakness			Strength		Weakness	
	Has great historical or heritage sites and experiences	Weakness	Weakness	Strength	Weakness	Strength	Strength	Strength	Weakness			Weakness	Weakness
	Has a culture that I would want to experience	Weakness	Weakness	Strength		Strength	Strength	Strength			Strength		Weakness

Strength | Weakness

Note: all respondents evaluated Canada plus 3 randomly selected countries from the competitive set.
Base: Long-haul holiday travellers (past 3 years or next 2 years), HVG Audience, 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: Among HVG Audience

DESTINATION CANADA

In terms of the brand value statements, the HVG audience perceives Canada to have the same strengths as total travellers: embraces cultural diversity, open-minded, embraces new ideas and is a good place to live.

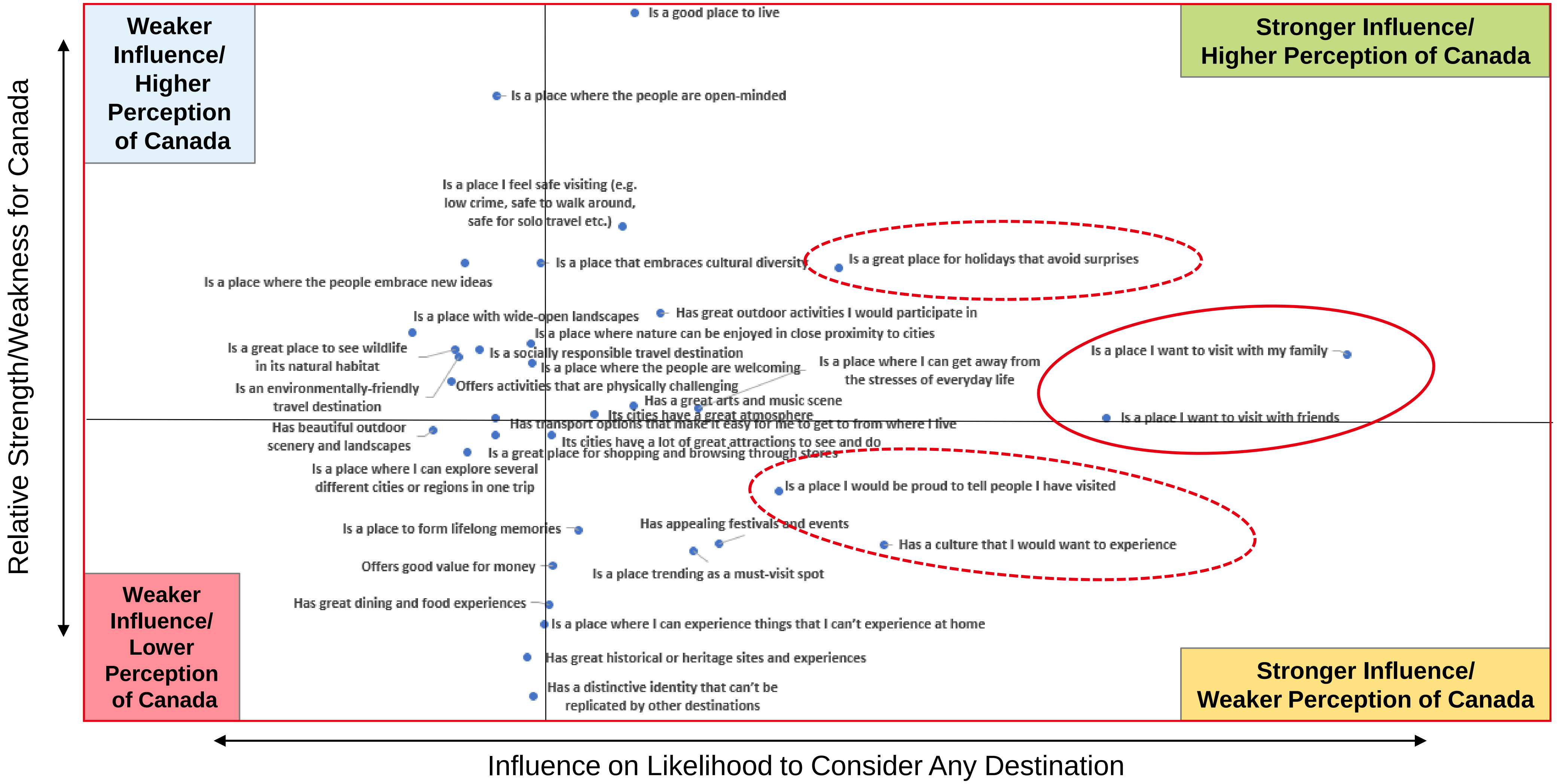
	Canada	Australia	China	Iceland	India	Japan	Mexico	New Zealand	South Africa	Thailand	United Arab Emirates	United States
n=	333	91	107	89	89	83	87	91	91	91	90	90
Is a place with wide-open landscapes												
Is a place where nature can be enjoyed in close proximity to cities												
Is a place that 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												

Strength | Weakness

Note: all respondents evaluated Canada plus 3 randomly selected countries from the competitive set.
Base: Long-haul holiday travellers (past 3 years or next 2 years), HVG Audience, 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: Among HVG Audience

Visiting with friends, having an experiential culture, and proud to tell people you've visited are attributes that could be prioritized given Canada's weaker perceptions and strong influence on consideration. Canada may also want to consider boosting perceptions of its appealing festivals/events and being a must-visit spot as these are mid-tier drivers.

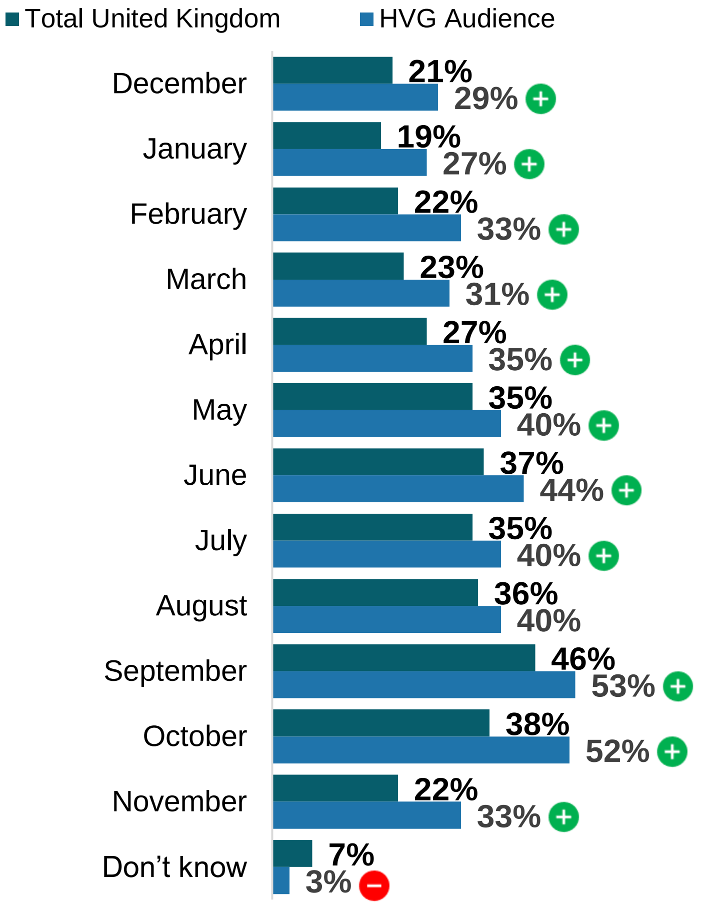


Increasing Fall/Winter Visitation

Demand by Season (Any Destination)

DESTINATION CANADA

Almost two-thirds of total UK travellers typically take trips in Summer or Fall, with Winter having the lowest travel incidence. At nearly three quarters, HVGs are slightly more likely to travel in the Fall than the Summer.



	Total United Kingdom	HVG Audience	POTENTIAL MARKET SIZE* Total United Kingdom	HVG Audience
Winter	38%	54% ⊕	**6,128,500**	**1,848,000**
Spring	51%	61% ⊕	**8,203,500**	**2,090,500**
Summer	62%	69% ⊕	**9,927,000**	**2,370,500**
Fall	63%	74% ⊕	**10,007,000**	**2,541,000**

TOTAL U.K.
Increase not only in passion for travel, but booking trips outside of school holidays/breaks

YouGov Global Travel Profiles (United Kingdom) – 2023 Base: Total UK Residents 18+

** Calculation: Total potential long-haul holiday travellers aged 18 years or more (15,960,000) x total in UK typically travel during season*

** Calculation: Total potential HVG travellers (3,415,500) x total HVG typically travel during season*

Base: Long-haul holiday travellers (past 3 years or next 2 years) (n=1532); HVG (n=333)
D1. In general, what time of year do you typically like to take holiday trips? Select all that apply

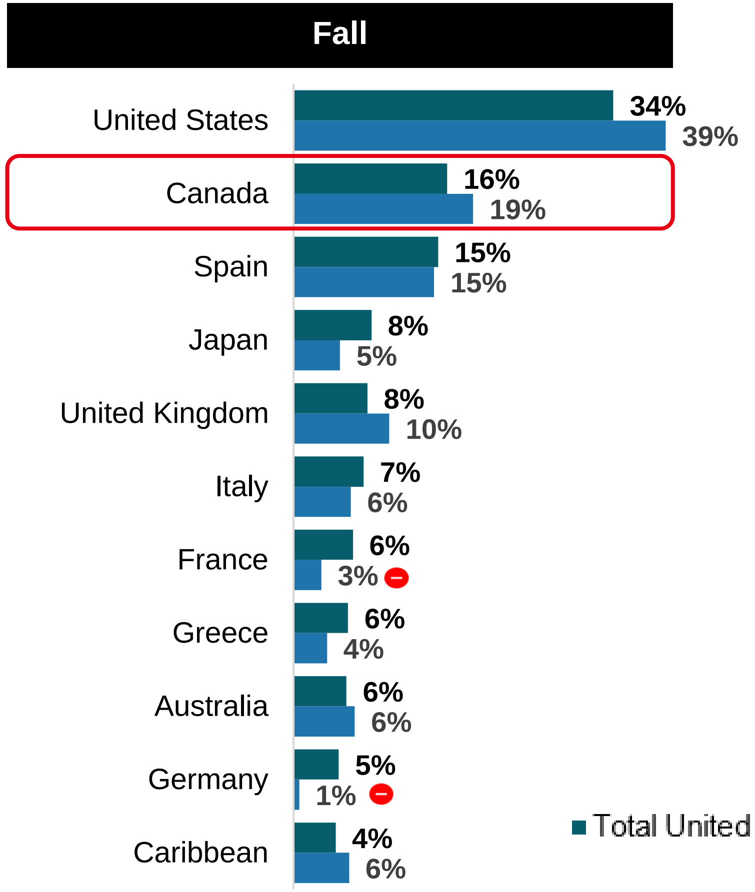
⊕ / ⊖ = significantly higher/lower result (vs. Total)

Top of Mind Fall/Winter Destinations

Canada is the top mentioned destination to experience the Winter season, followed closely by Switzerland. The US leads Fall season mentions, with Canada ranking second at about half the mentions.

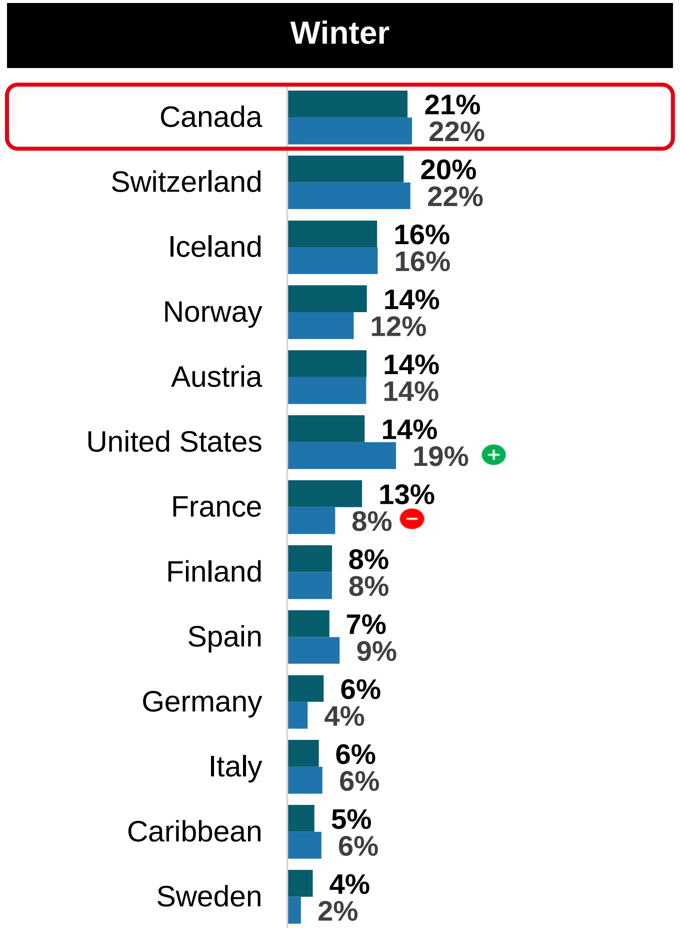
Autumn Season Description

Autumn is the season between summer and winter. Autumn tends to be a slower season after the busy summer in most destinations. In some destinations, the weather becomes cooler and the leaves on trees shift to red, orange and yellow in preparation to shed. While autumn has some distinct activities and experiences, many summer activities can still be done in autumn.



Winter Season Description

Winter is a season that is typically characterized by colder temperatures. During the winter months there are usually festivals, snow sports and holiday activities. It may snow in some destinations, allowing for skiing, snowboarding, outdoor spas and other winter activities.

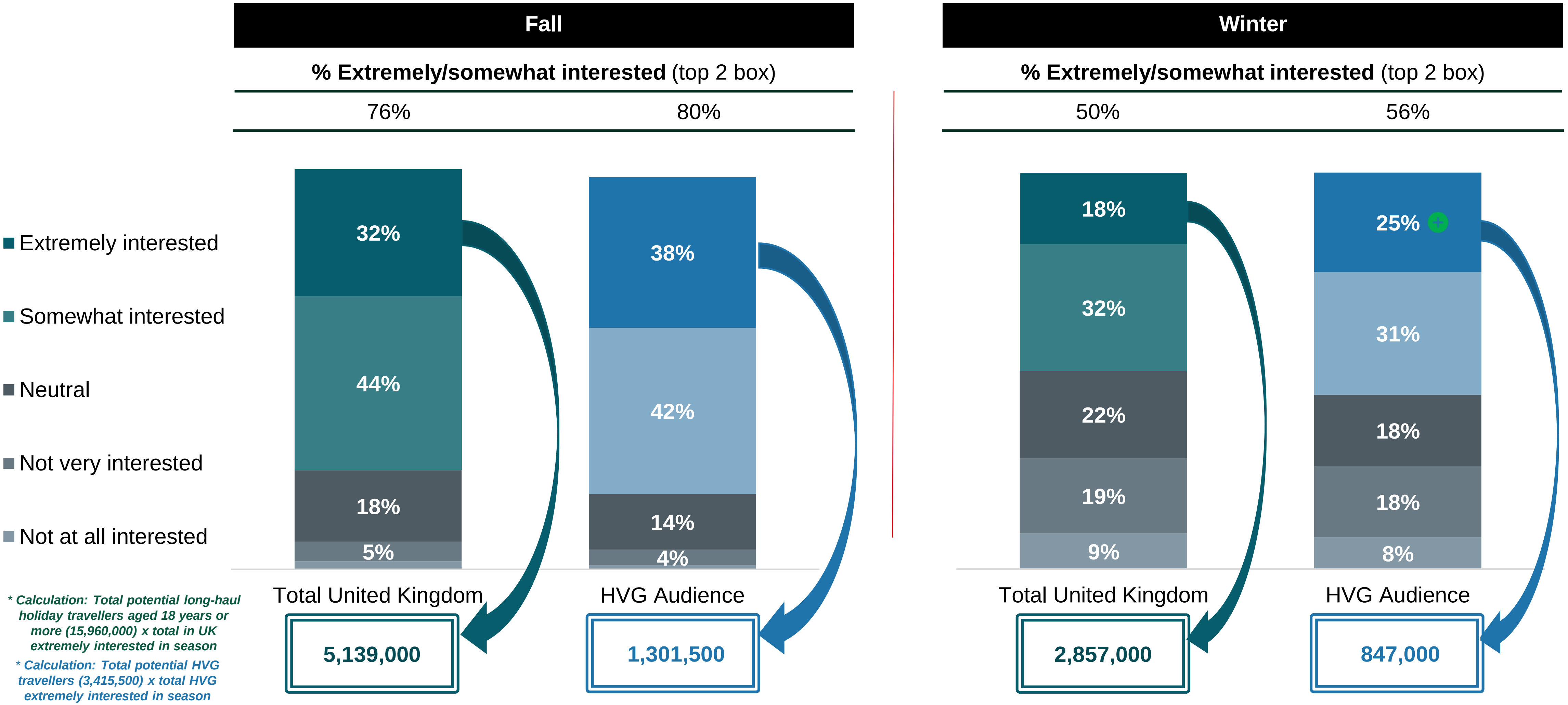


Note: respondents were asked either about winter travel (B2/D2) or fall travel (B3/D3)
Base: Long-haul holiday travellers (past 3 years or next 2 years)
B3. What destinations come to mind when thinking about travel to experience the **autumn season**? (Please list up to 3 destinations. You can mention 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. (n=796); HVG (n=168)
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. (n=736); HVG (n=165)

+ / − = significantly higher/lower result (vs. Total)

Interest in Fall/Winter Holidays

Interest in taking a holiday to a destination during it's Winter season is softer than interest in the Fall among total UK travellers as well as the HVG audience. HVGs, however, are more likely to be interested in travelling to a destination during it's Winter season than the average traveller.



** Calculation: Total potential long-haul holiday travellers aged 18 years or more (15,960,000) x total in UK extremely interested in season*

** Calculation: Total potential HVG travellers (3,415,500) x total HVG extremely interested in season*

Note: respondents were asked either about winter travel (B2/D2) or fall travel (B3/D3)
Base: Long-haul holiday travellers (past 3 years or next 2 years)
D3. In general, how interested are you in taking a holiday trip to a destination during **its autumn season**? (n=796); HVG (n=168)
D2. In general, how interested are you in taking a holiday trip to a destination during **its winter season**? (n=736); HVG (n=165)

+ / − = significantly higher/lower result (vs. Total)

Potential Market Size For Canada in Fall/Winter

DESTINATION CANADA

When it comes to immediate potential for Canada in the next 2 years, Fall has 2.2 times the potential compared to the Winter season.

	Total potential travellers aged 18 years or more		**Target Market for Canada** (Those in the dream to purchase stages of the path to purchase for Canada)		Size of the target market		**Consideration for Canada in [SEASON] in N2Y**		Immediate potential for Canada in N2Y
Long haul pleasure travellers	15,960,000	x	73.9%	=	11,794,500	x	Fall: 50.7%	=	Fall: 5,976,500
							Winter: 23.1%		Winter: 2,724,500
HVG travellers	3,415,500	x	75.4%	=	2,575,500	x	Fall: 55.3%	=	Fall: 1,424,500
							Winter: 25.1%		Winter: 646,500

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) Total (n=1532); HVG (n=333)
C7. For each of the following destinations, during which months would you consider taking a holiday trip in the next 2 years? Total (n=1133); HVG (n=252)

Fall/Winter Conversion – Total United Kingdom

There is similar conversion (~50%) for Fall and Winter for those who typically travel during that season and those who have interest in taking a trip during a destination's Fall or Winter season. However, Canada has very strong potential to convert those who are interested in travel during both the Fall and Winter seasons.

Fall

Demand During Fall Months (any destination): **10,007,000**

51%

Extremely Interested in Visiting a Destination During its Fall Season (any destination): **5,139,000**

116%

Next 2 Year Immediate Potential for CANADA During Fall Season: **5,976,500**

Winter

Demand During Winter Months (any destination): **6,128,500**

47%

Extremely Interested in Visiting a Destination During its Winter Season (any destination): **2,857,000**

95%

Next 2 Year Immediate Potential for CANADA During Winter Season: **2,724,500**

Base: Long-haul holiday 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=1532)
D3. In general, how interested are you in taking a holiday trip to a destination during **its autumn season**? Total (n=796)
D2. In general, how interested are you in taking a holiday trip to a destination during **its winter season**? Total (n=736)
C7. For each of the following destinations, during which months would you consider taking a long-haul trip in the next two years? Total (n=1133)

Fall/Winter Conversion – Among HVG Audience

DESTINATION CANADA

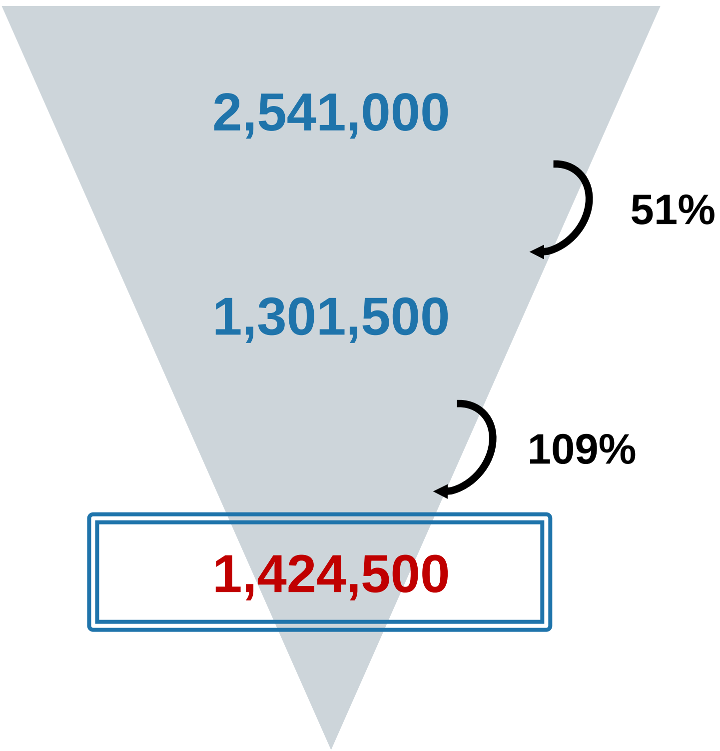
There is also similar conversion (~50%) for Fall and Winter among HVGs for those who typically travel during that season and those who have interest in taking a trip during a destination's Fall or Winter season. Canada has strong potential to convert those who are interested in travel during both the Fall and Winter seasons, with interest in travelling to Canada during the Fall exceeding interest in visiting any destination's Fall season.

Fall

Demand During Fall Months (any destination)

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

Next 2 Year Immediate Potential for CANADA During Fall Season

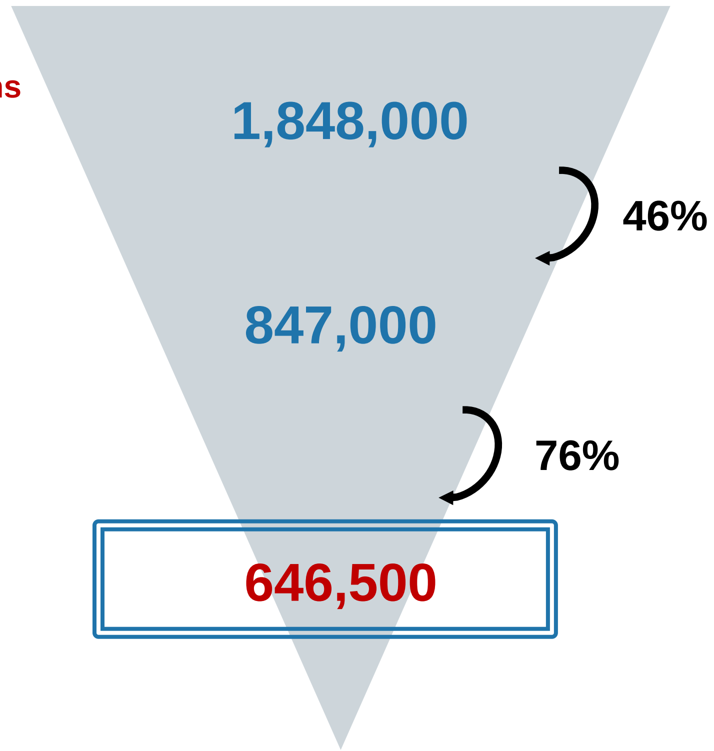


Winter

Demand During Winter Months (any destination)

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

Next 2 Year Immediate Potential for CANADA During Winter Season



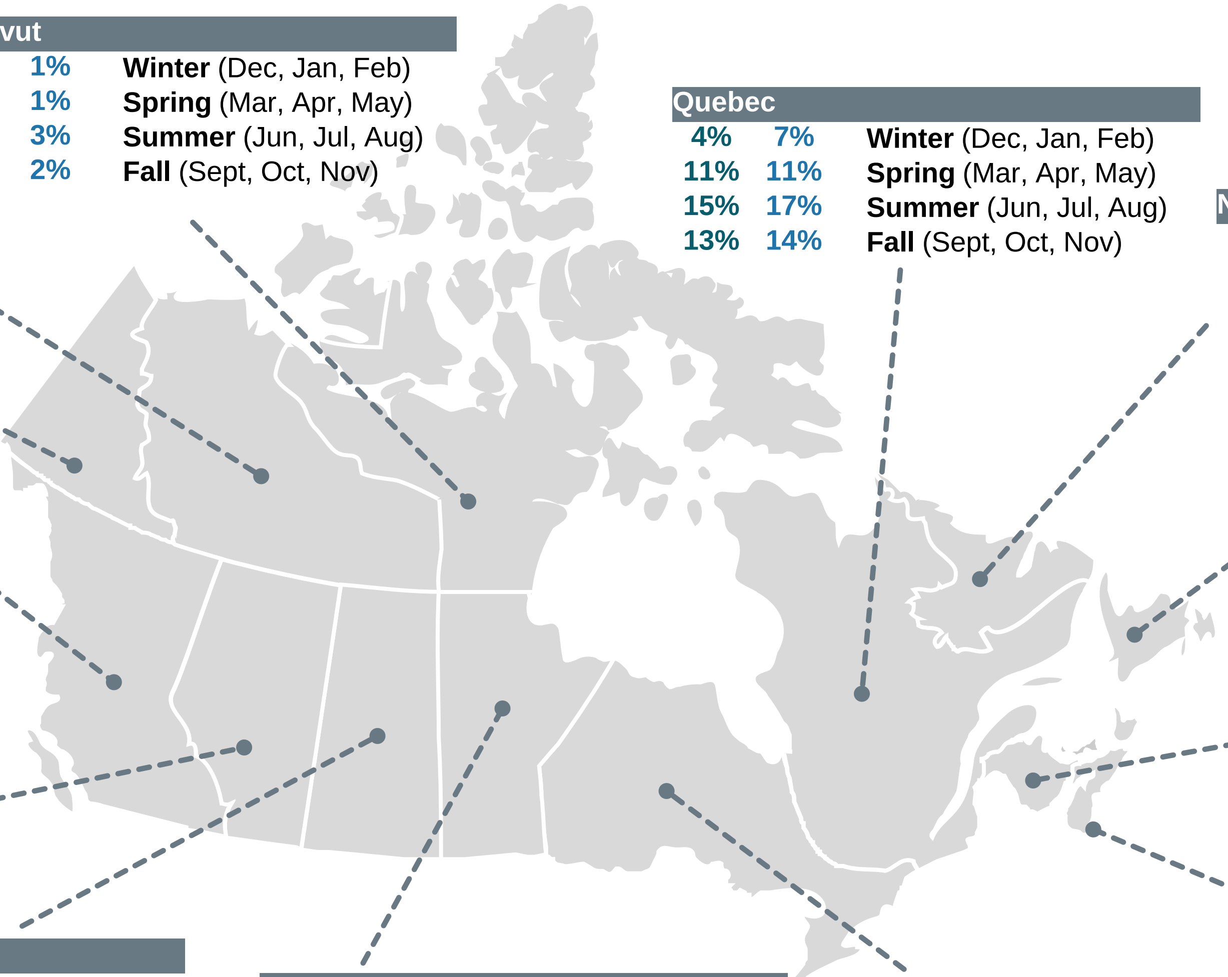
Base: Long-haul holiday travellers (past 3 years or next 2 years), HVG Audience
D1. In general, what time of year do you typically like to take holiday trips? Select all that apply HVG (n=333)
D3. In general, how interested are you in taking a holiday trip to a destination during **its autumn season**? HVG (n=168)
D2. In general, how interested are you in taking a holiday trip to a destination during **its winter season**? HVG (n=165)
C7. For each of the following destinations, during which months would you consider taking a long-haul trip in the next two years? HVG (n=252)

Time of Year Interested in Visiting Canada (Next 2 Years)

DESTINATION CANADA

British Columbia and Ontario, followed by Alberta and Quebec are the most popular destinations for Fall visits.

Total United Kingdom | HVG Audience



Northwest Territories

Total United Kingdom	HVG Audience	Season
1%	1%	**Winter** (Dec, Jan, Feb)
2%	2%	**Spring** (Mar, Apr, May)
4%	5%	**Summer** (Jun, Jul, Aug)
3%	5%	**Fall** (Sept, Oct, Nov)

Nunavut

Total United Kingdom	HVG Audience	Season
1%	1%	**Winter** (Dec, Jan, Feb)
1%	1%	**Spring** (Mar, Apr, May)
2%	3%	**Summer** (Jun, Jul, Aug)
1%	2%	**Fall** (Sept, Oct, Nov)

Quebec

Total United Kingdom	HVG Audience	Season
4%	7%	**Winter** (Dec, Jan, Feb)
11%	11%	**Spring** (Mar, Apr, May)
15%	17%	**Summer** (Jun, Jul, Aug)
13%	14%	**Fall** (Sept, Oct, Nov)

Newfoundland & Labrador

Total United Kingdom	HVG Audience	Season
1%	3%	**Winter** (Dec, Jan, Feb)
4%	4%	**Spring** (Mar, Apr, May)
6%	8%	**Summer** (Jun, Jul, Aug)
5%	6%	**Fall** (Sept, Oct, Nov)

Yukon

Total United Kingdom	HVG Audience	Season
1%	2%	**Winter** (Dec, Jan, Feb)
3%	2%	**Spring** (Mar, Apr, May)
4%	4%	**Summer** (Jun, Jul, Aug)
2%	2%	**Fall** (Sept, Oct, Nov)

British Columbia

Total United Kingdom	HVG Audience	Season
6%	9%	**Winter** (Dec, Jan, Feb)
20%	23%	**Spring** (Mar, Apr, May)
27%	34% (+)	**Summer** (Jun, Jul, Aug)
24%	29% (+)	**Fall** (Sept, Oct, Nov)

Prince Edward Island

Total United Kingdom	HVG Audience	Season
1%	1%	**Winter** (Dec, Jan, Feb)
2%	3%	**Spring** (Mar, Apr, May)
3%	6% (+)	**Summer** (Jun, Jul, Aug)
3%	3%	**Fall** (Sept, Oct, Nov)

New Brunswick

Total United Kingdom	HVG Audience	Season
1%	2% (+)	**Winter** (Dec, Jan, Feb)
2%	2%	**Spring** (Mar, Apr, May)
2%	3%	**Summer** (Jun, Jul, Aug)
2%	2%	**Fall** (Sept, Oct, Nov)

Alberta

Total United Kingdom	HVG Audience	Season
5%	6%	**Winter** (Dec, Jan, Feb)
13%	14%	**Spring** (Mar, Apr, May)
16%	19%	**Summer** (Jun, Jul, Aug)
15%	18%	**Fall** (Sept, Oct, Nov)

Nova Scotia

Total United Kingdom	HVG Audience	Season
1%	3% (+)	**Winter** (Dec, Jan, Feb)
4%	4%	**Spring** (Mar, Apr, May)
7%	7%	**Summer** (Jun, Jul, Aug)
6%	5%	**Fall** (Sept, Oct, Nov)

Saskatchewan

Total United Kingdom	HVG Audience	Season
1%	3% (+)	**Winter** (Dec, Jan, Feb)
2%	2%	**Spring** (Mar, Apr, May)
3%	4%	**Summer** (Jun, Jul, Aug)
2%	4%	**Fall** (Sept, Oct, Nov)

Manitoba

Total United Kingdom	HVG Audience	Season
1%	1%	**Winter** (Dec, Jan, Feb)
3%	2%	**Spring** (Mar, Apr, May)
4%	3%	**Summer** (Jun, Jul, Aug)
3%	4%	**Fall** (Sept, Oct, Nov)

Ontario

Total United Kingdom	HVG Audience	Season
6%	7%	**Winter** (Dec, Jan, Feb)
17%	16%	**Spring** (Mar, Apr, May)
27%	28%	**Summer** (Jun, Jul, Aug)
21%	23%	**Fall** (Sept, Oct, Nov)

Base: Those in the dream to purchase stages of the path to purchase for Canada & definitely/likely to take a trip to Canada (n=1133); HVG (n=252)
E3a-m. During what time of year are you considering visiting [PROVINCE]? (Select all that apply)

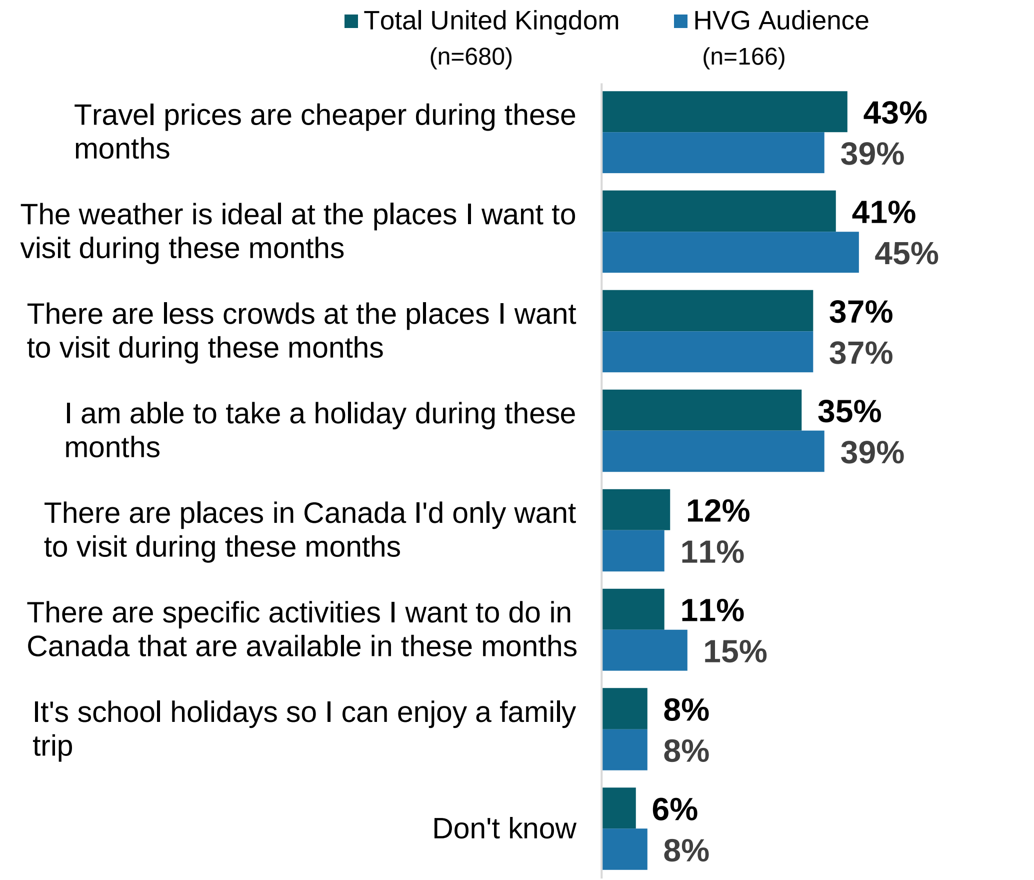
(+) / (−) = significantly higher/lower result (vs. Total)

Motivators & Barriers for Fall Travel to Canada

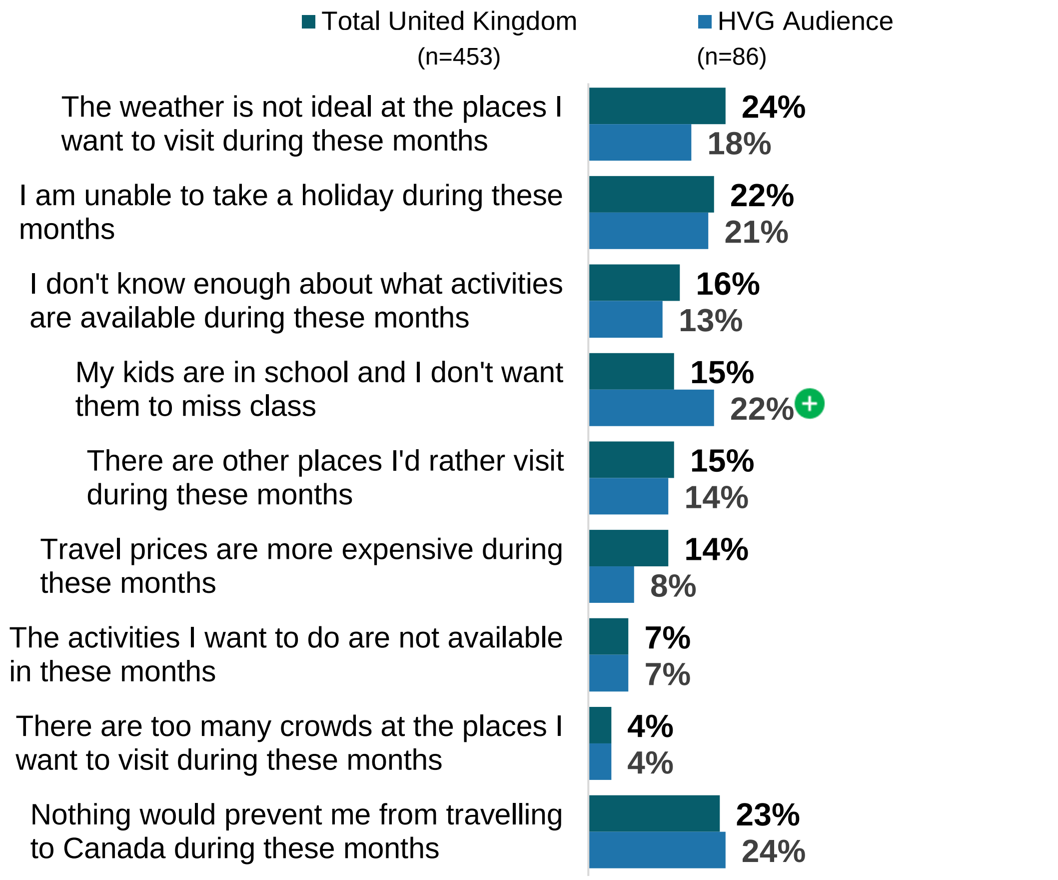
DESTINATION CANADA

In the Fall, lower prices is a top motivator to travel in the season. Weather is both a motivator and a barrier for Fall travel.

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**?

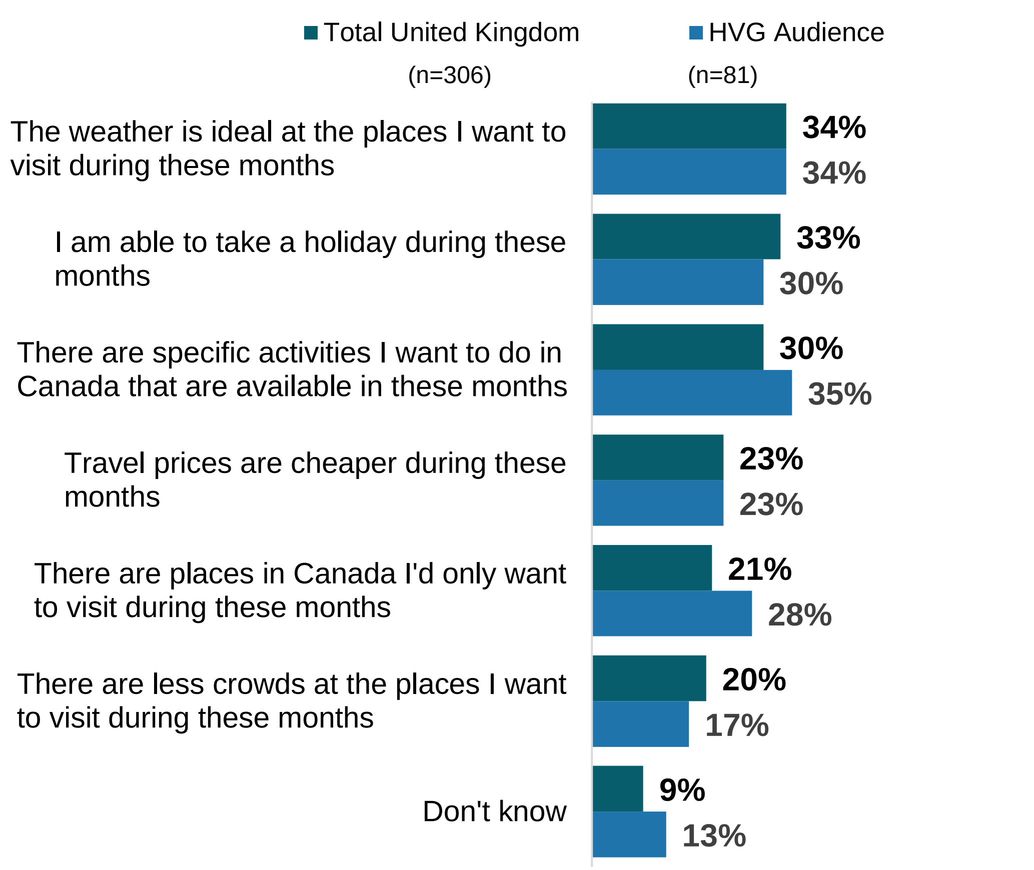
+ / − = significantly higher/lower result (vs. Total)

Motivators & Barriers for Winter Travel to Canada

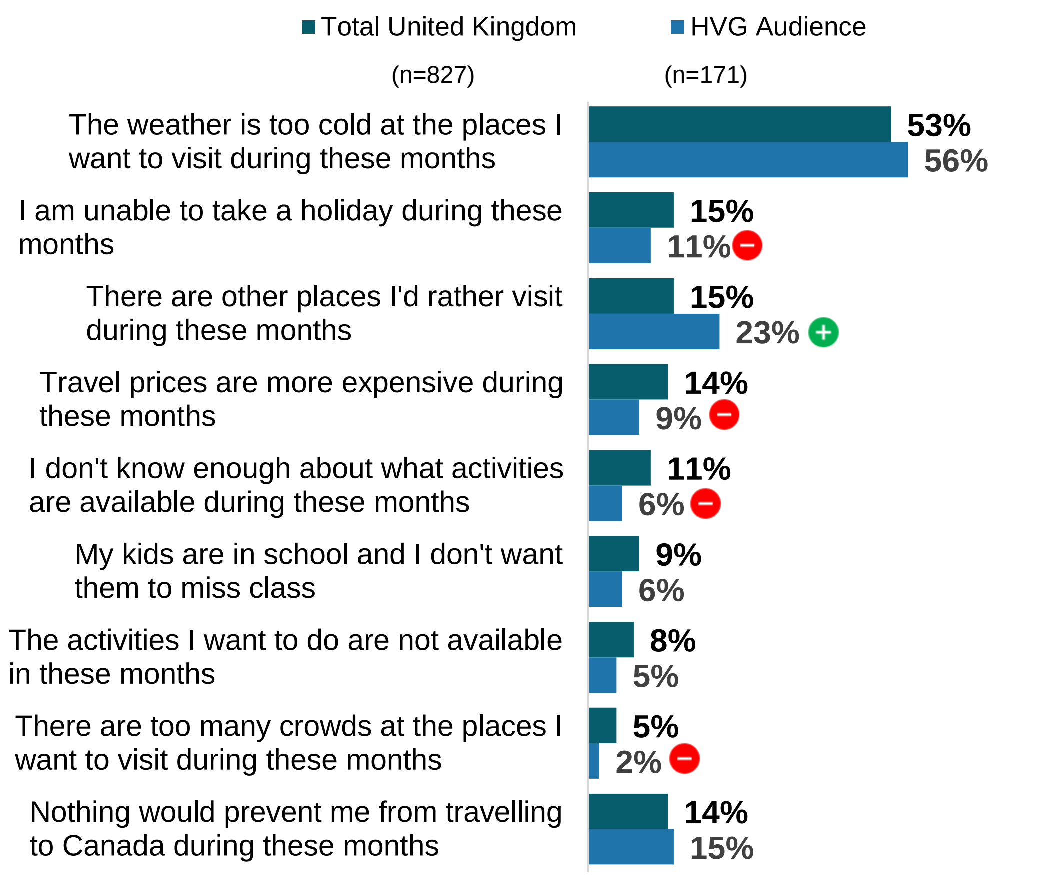
DESTINATION CANADA

The winter weather, ability to take holidays, and season-specific activities are the key considerations for Winter travel while the cold winter weather is also the predominant barrier to Winter travel.

Motivators for Winter Travel



Barriers for Winter Travel



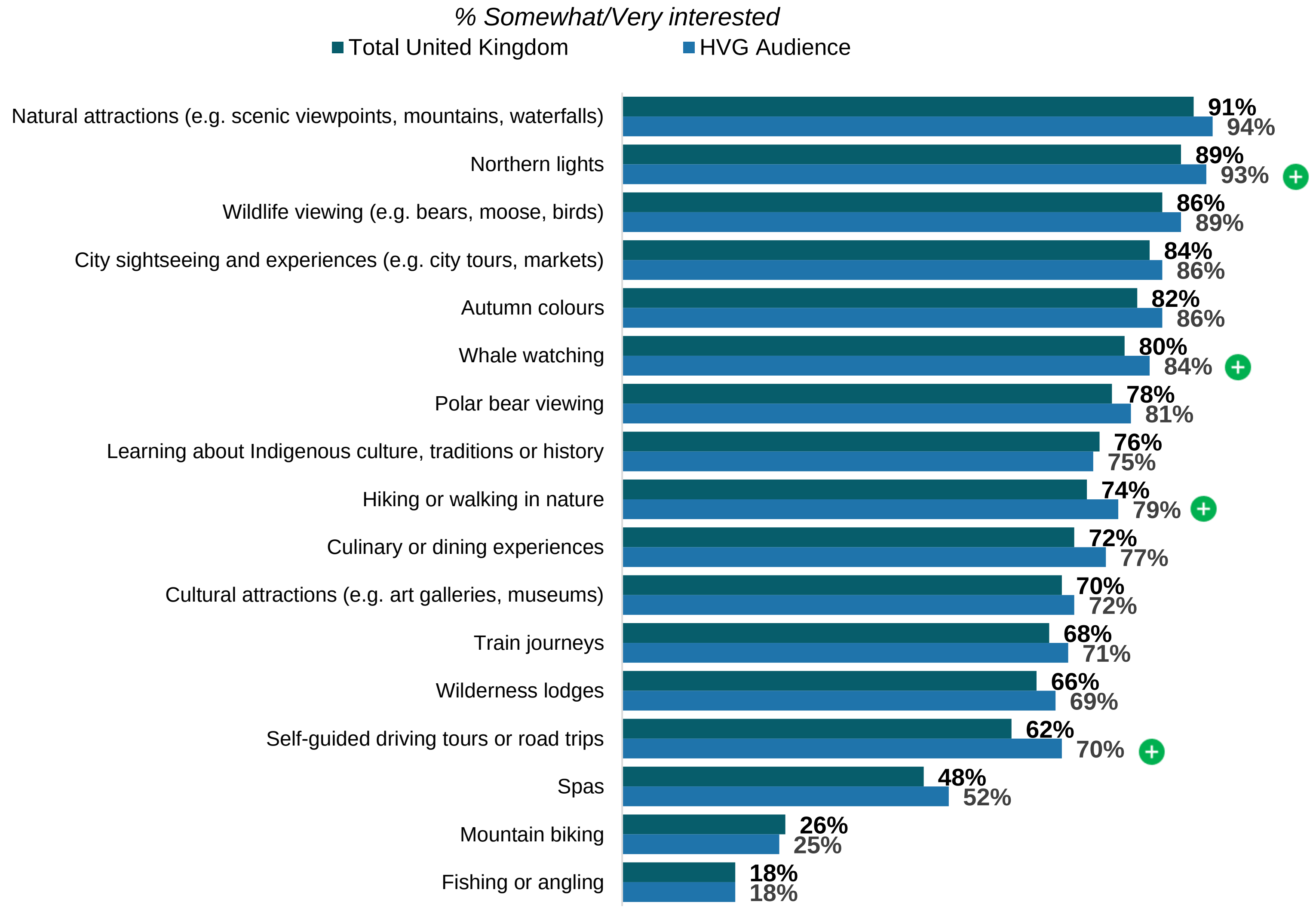
Base: Those in the dream to purchase stages of the path to purchase for Canada and considering visiting Canada or any province/territory in December, January or February
E8a. You indicated earlier that you are considering taking a holiday to **Canada** during the months of December, January and/or February… 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**?

+ / − = significantly higher/lower result (vs. Total)

Interest in Fall Activities in Canada

DESTINATION CANADA

Natural attractions, Northern lights and wildlife viewing are activities of most interest to UK travellers to Canada in the Fall. Of note, HVGs have significantly greater interest in self-guided driving tours or road trips.



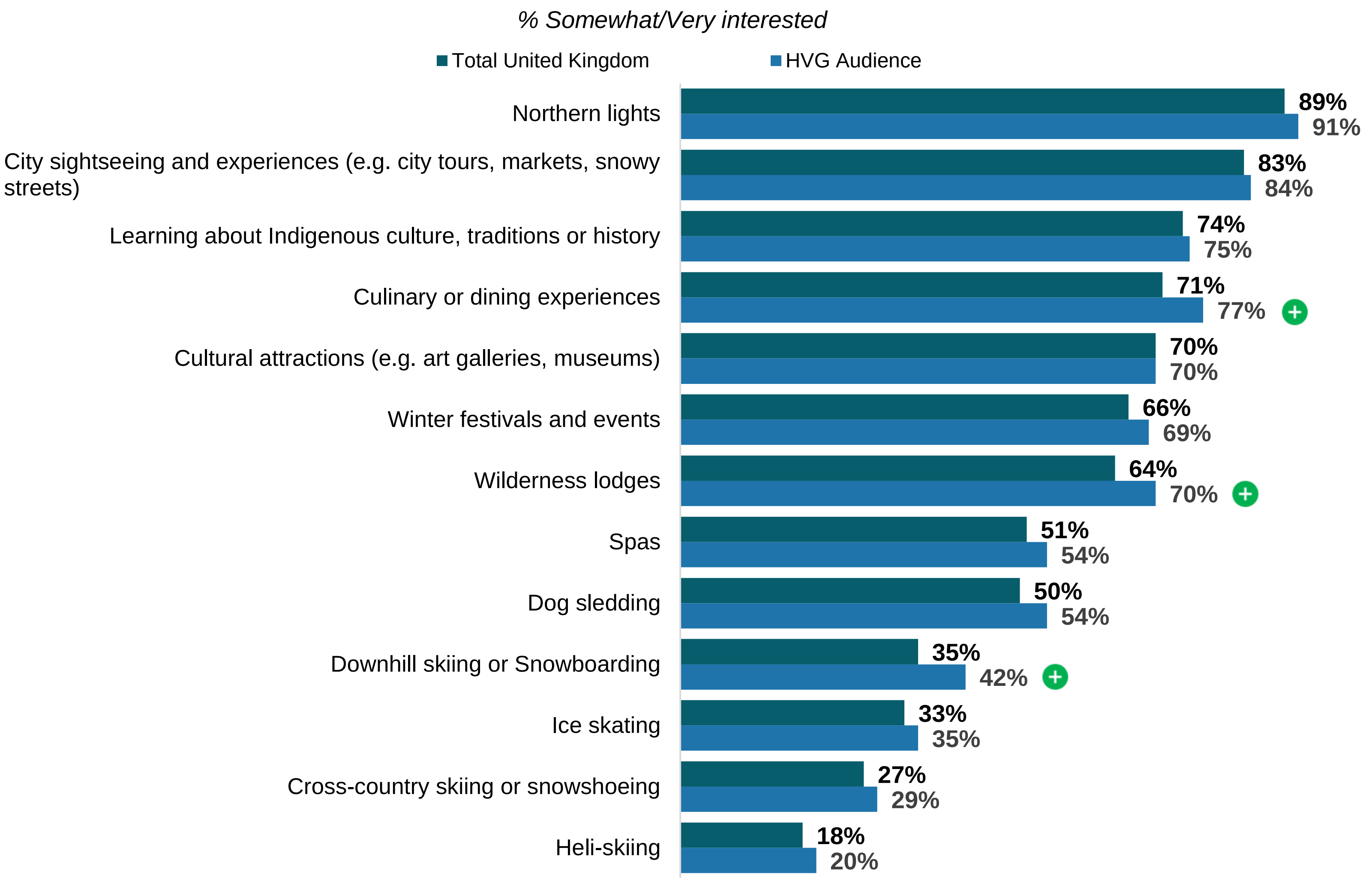
Base: Those in the dream to purchase stages of the path to purchase for Canada (n=1133); HVG (n=252)
E11. What is your level of interest in the following activities or experiences in Canada during the **autumn season**?

+ / − = significantly higher/lower result (vs. Total)

Interest in Winter Activities in Canada

DESTINATION CANADA

In the Winter, Northern lights, city sightseeing and learning about Indigenous culture are of most interest to UK travellers to Canada. HVGs have a greater interest in culinary/dining experiences, wilderness lodges and skiing/snowboarding.



Base: Those in the dream to purchase stages of the path to purchase for Canada (n=1133); HVG (n=252)
E10. What is your level of interest in the following activities or experiences in Canada during the **winter season**?

+ / − = significantly higher/lower result (vs. Total)

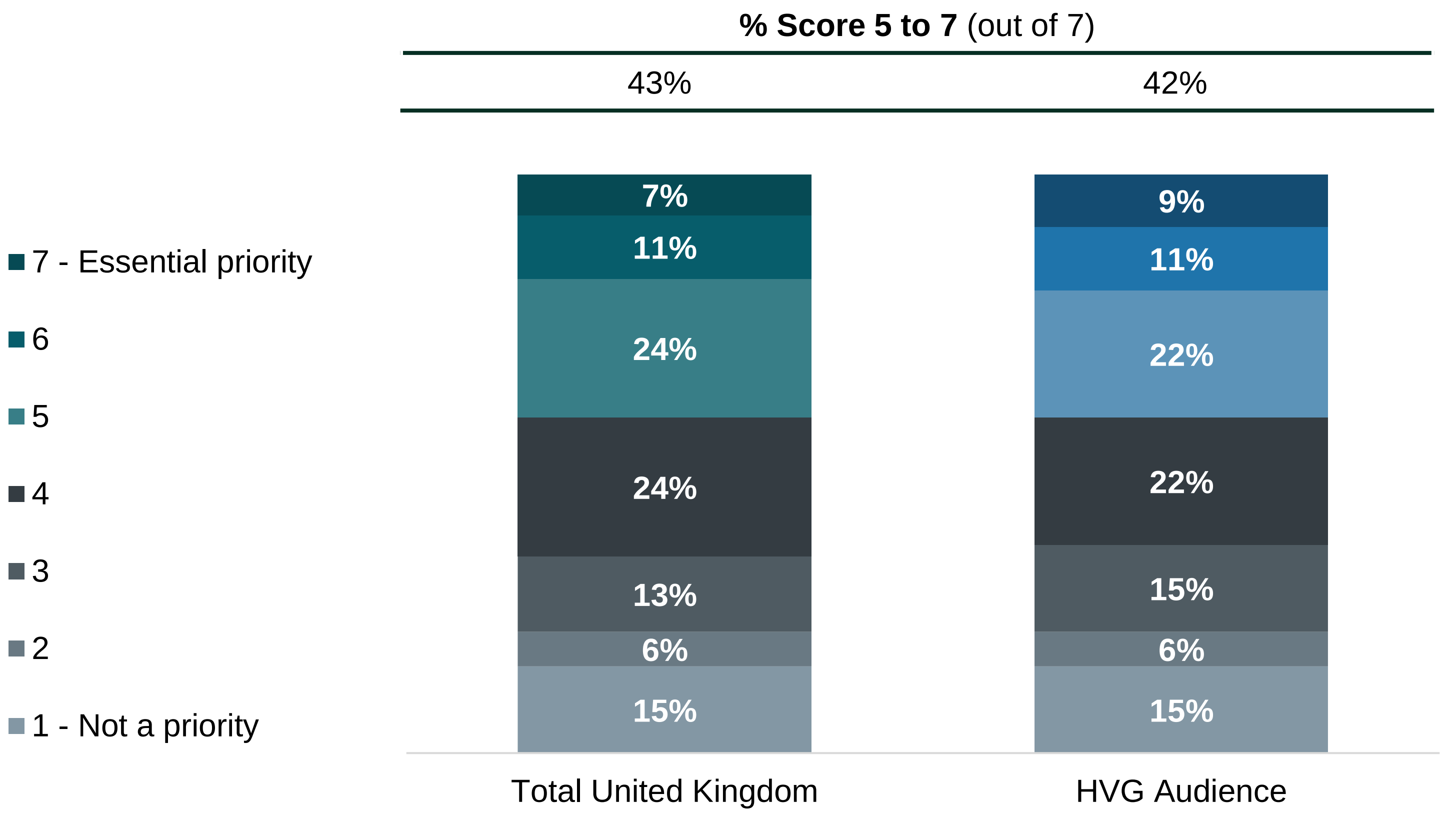
Sustainability

Churchill
Manitoba

Priority of Sustainable Travel When Planning a Trip

DESTINATION CANADA

Although less than half of UK travellers prioritize sustainability in trip planning, it still ranks in the top half of consideration drivers for all travellers. Notably, there is a significant gap when Canada is compared to leading countries such as Iceland and New Zealand, particularly in terms of environmental friendliness.



% Associate [DESTINATION] with…	*Is an environmentally friendly travel destination*	
	Total UK	**HVG**
Canada	**32%**	**34%**
Iceland	**42%**	**49%**
New Zealand	**40%**	**50%**

% Associate [DESTINATION] with…	*Is a socially responsible travel destination*	
	Total UK	**HVG**
Canada	**40%**	**40%**
Iceland	**42%**	**47%**
New Zealand	**42%**	**42%**

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".

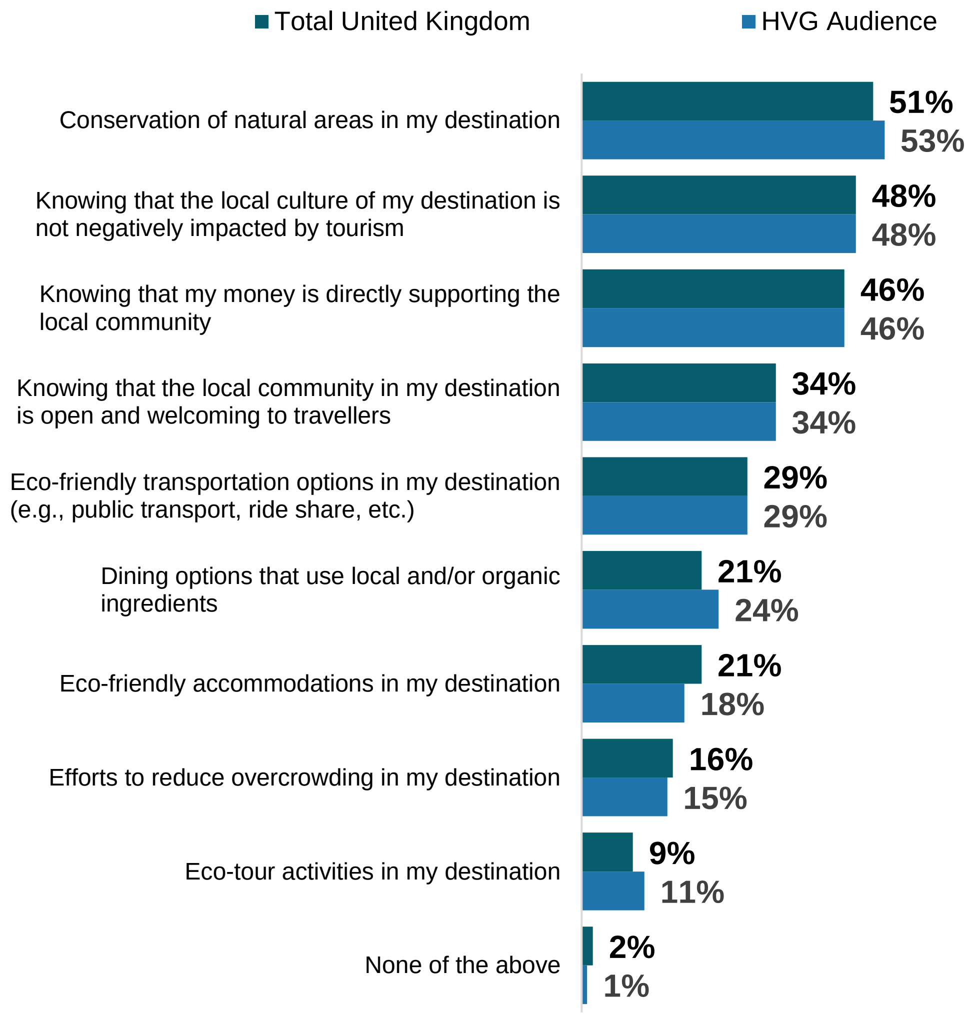
Base: Long-haul holiday travellers (past 3 years or next 2 years) (n=1532); HVG (n=333)
D7. [DESCRIPTION] How much of a priority is sustainable travel to you when you are planning a trip? Please use a 7-point scale, where 7 means 'essential priority' and 1 means 'not a priority'.
C6. We are interested 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.

+ / − = significantly higher/lower result (vs. Total)

Top 3 Most Important Sustainability Efforts

DESTINATION CANADA

Sustainability efforts that are the most important to UK travellers are conservation of natural areas, knowing the destination is not negatively impacted by tourism and knowing that the money is supporting the local community.



Sustainable Travel Description

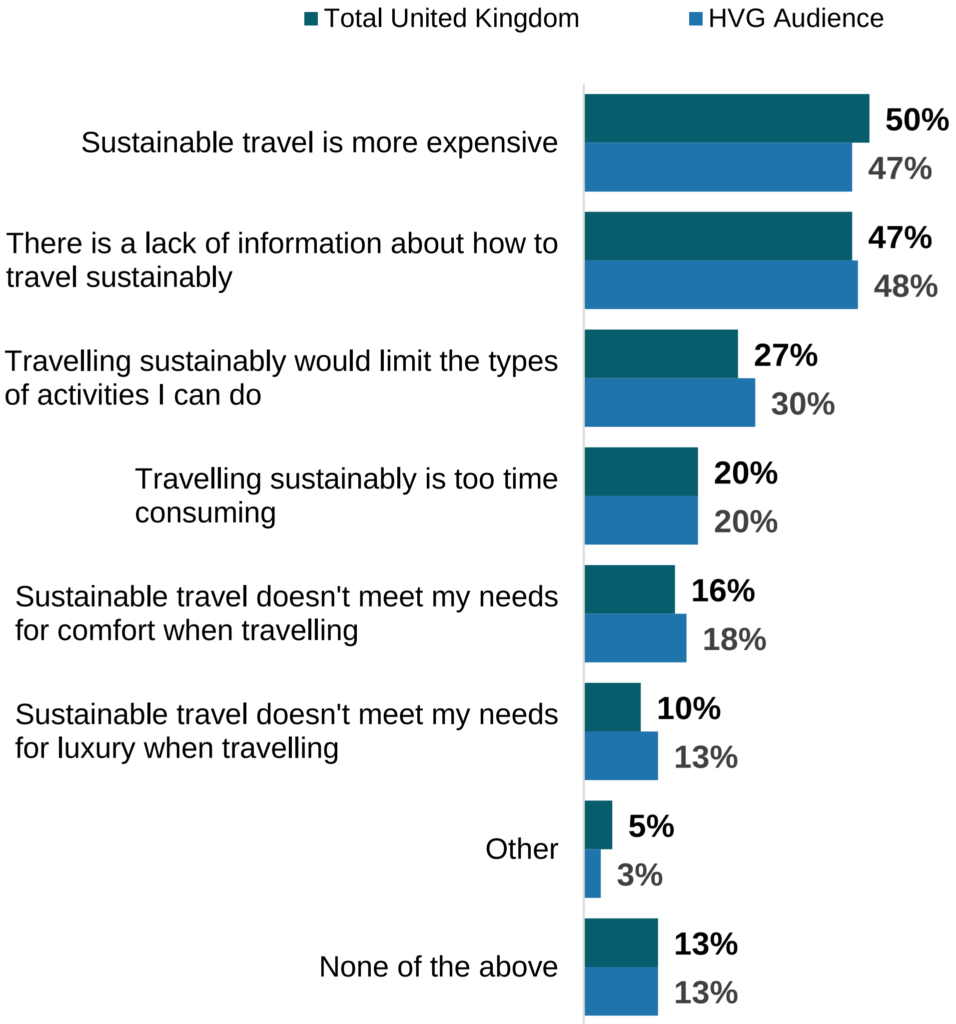
Sustainable travel refers to “travel that minimizes any negative impacts on the destination’s environment, economy and society, while making positive contributions to the local people and conserving the destination’s natural and cultural heritage”.

Base: Long-haul holiday travellers (past 3 years or next 2 years), Rated 5-7 at D7 (n=652); HVG (n=141)
D8. What are the top 3 sustainability efforts that are most important to you when selecting a holiday destination? Select up to three choices.

+ / − = significantly higher/lower result (vs. Total)

Barriers to Sustainable Travel

The top barriers to sustainable travel include perceived price and lack of information on how to travel sustainably.



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”.

Base: Long-haul holiday travellers (past 3 years or next 2 years) (n=1532); HVG (n=333)
D9. Which of the following factors prevents you from choosing sustainable travel options? Select all that apply.

+ / − = significantly higher/lower result (vs. Total)

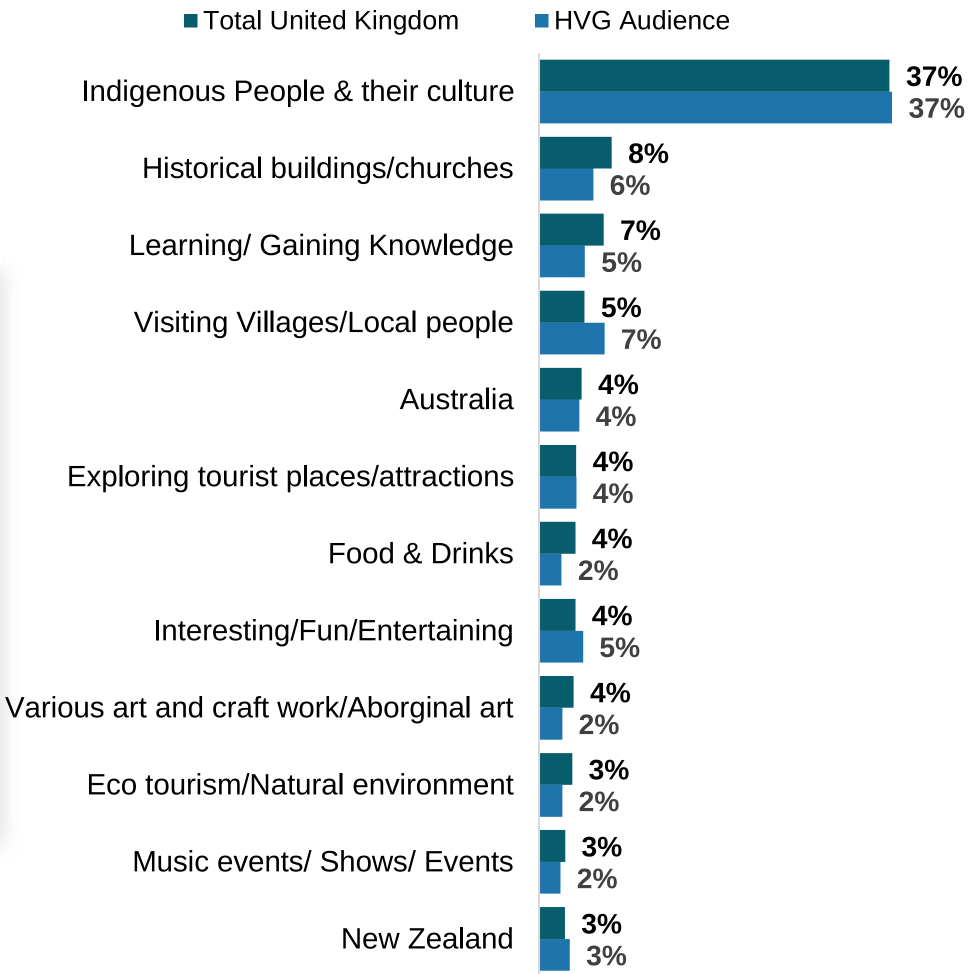
Indigenous Tourism

Unaided Mentions – Indigenous Cultural & Tourism Activities

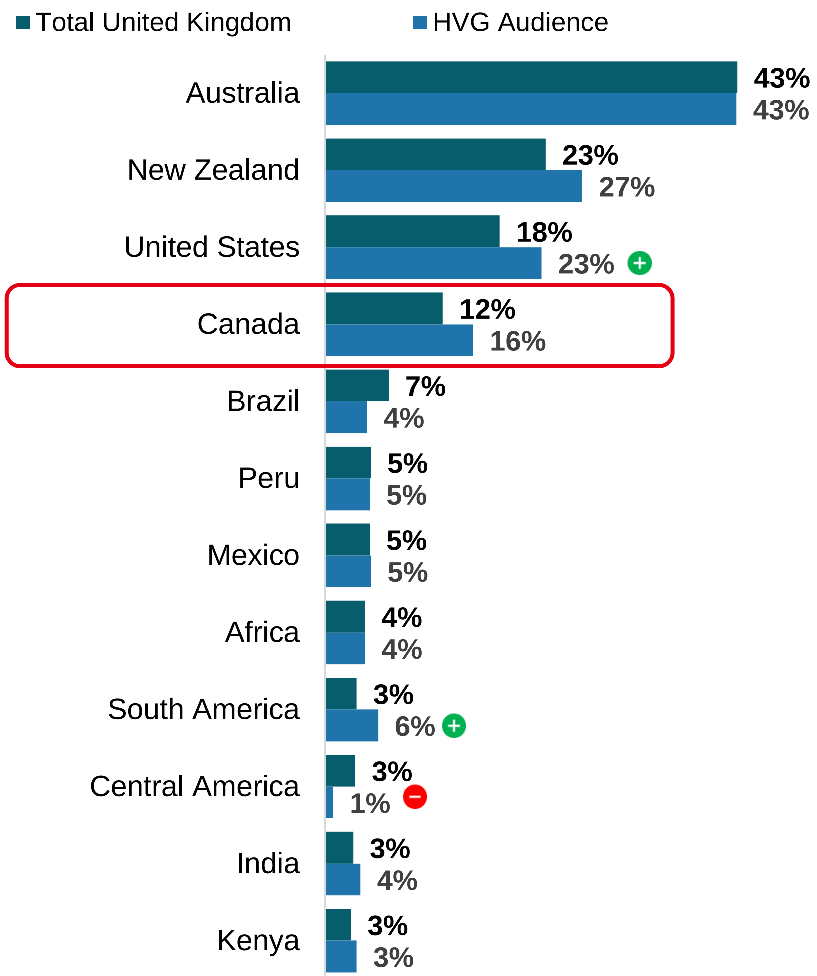
DESTINATION CANADA

Unprompted, there is little consensus as to what actual Indigenous cultural and tourism activities/experiences might entail. Australia is viewed as the top destination for experiencing Indigenous tourism while Canada ranks 4th.

Activities



Tourism Destinations



Indigenous Peoples Description

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.

Base: Long-haul holiday travellers (past 3 years or next 2 years) (n=1532); HVG (n=333)
D6. [DESCRIPTION] What comes to mind first when thinking about **Indigenous cultural and tourism activities or experiences**?
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.) Please note: You do not have to limit your responses to destinations you are considering for a vacation trip.

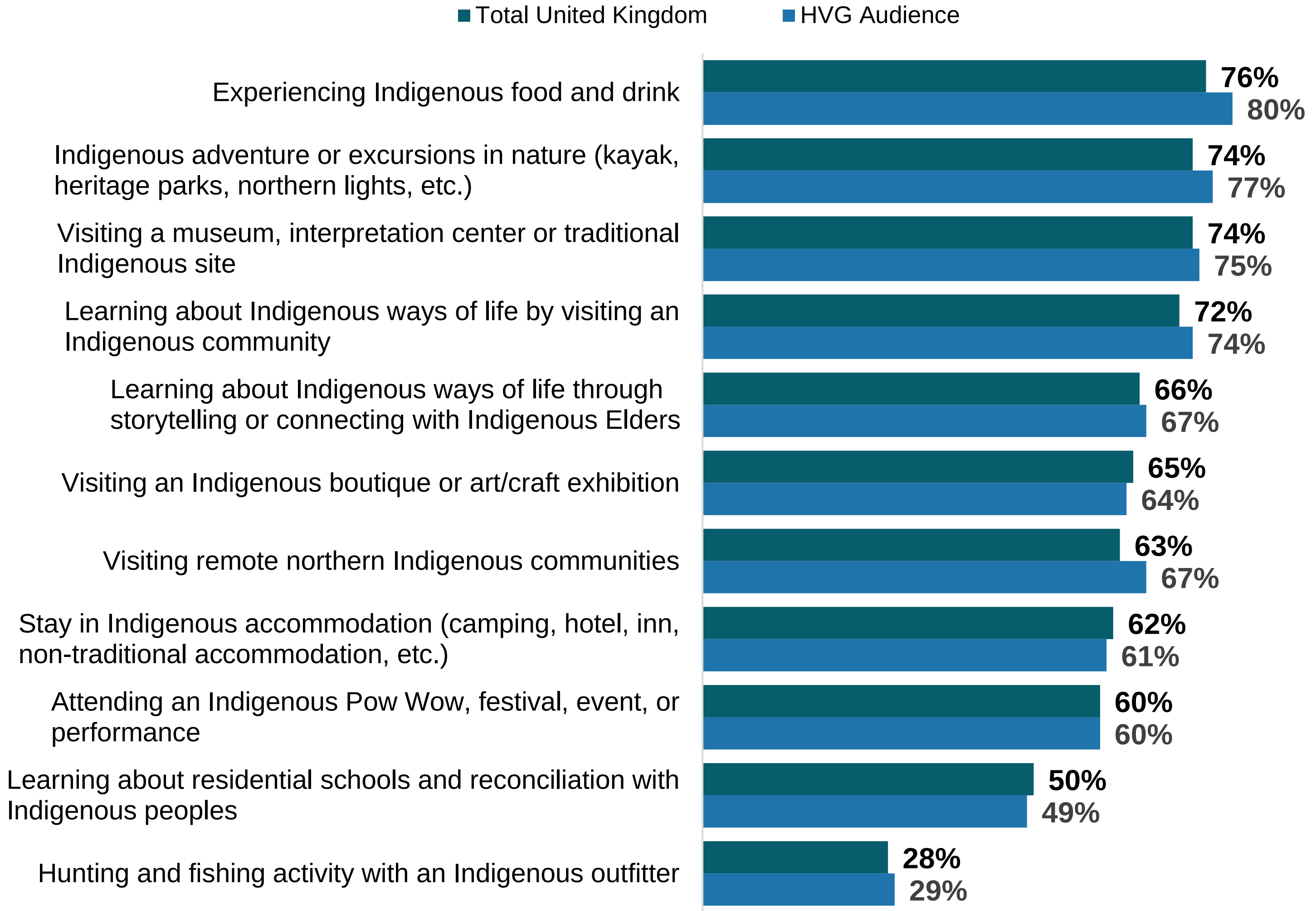
+ / − = significantly higher/lower result (vs. Total)

Interest in Indigenous Cultural & Tourism Activities

DESTINATION CANADA

UK travellers to Canada are interested in experiencing Indigenous culture through food and drink, excursions in nature or by visiting museums/sites or even Indigenous communities.

% Somewhat/Very interested



Indigenous Tourism Description

As you may or may not know, in Canada, Indigenous tourism businesses are majority-owned or operated by Indigenous peoples (First Nations, Métis or Inuit). The social and economic benefits of Indigenous tourism businesses goes back to the business owners and/or the communities where they are based.

Base: Those in the dream to purchase stages of the path to purchase for Canada (n=1133); HVG (n=252)
E12. [DESCRIPTION] What is your level of interest in the following Indigenous cultural experiences and tourism activities in Canada?

+ / − = significantly higher/lower result (vs. Total)

THANK YOU

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

DESTINATION CANADA

CANADIAN TOURISM DATA collective