

CONFIDENTIAL

2023 GLOBAL TRAVELLER RESEARCH PROGRAM

TOPLINE REPORT

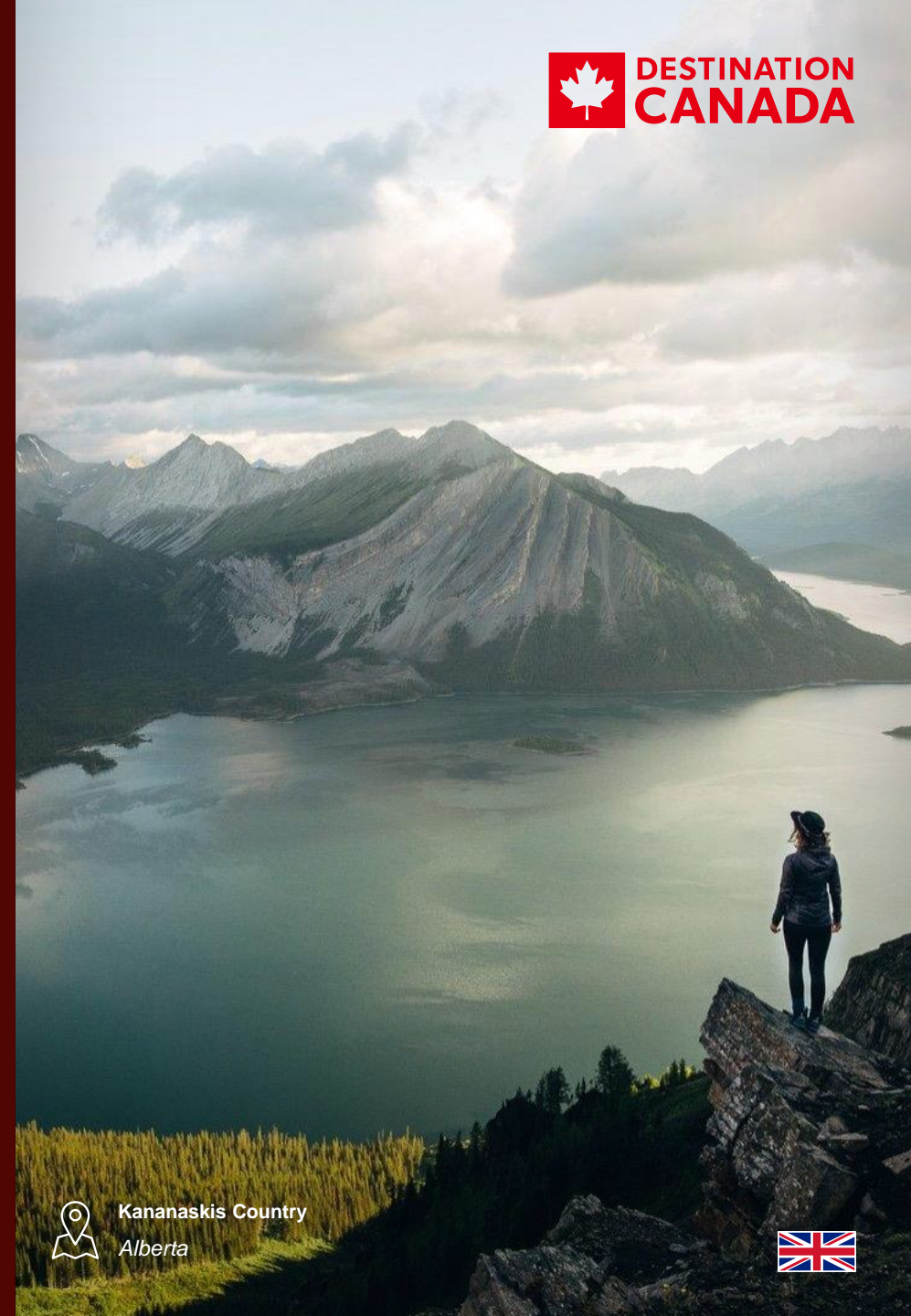
TOTAL UNITED KINGDOM VS. HIGH VALUE GUEST AUDIENCE



CANADIAN TOURISM DATA
collective

Table of Contents

Study Overview	3
Market Sizing	4
Key Performance Indicators	10
Market Outlook	13
Canada vs. Competitors	18
Travel Intentions to Canada	38
Travel Behaviours	43
Seasonal Travel	53
Indigenous Tourism	63
Most Recent Trip	67
Most Recent Trip to <u>Canada</u>	80



Study Overview: United Kingdom Market



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.



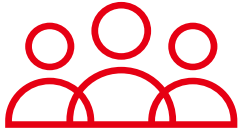
Timing of Fieldwork

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

- 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.





Market Sizing



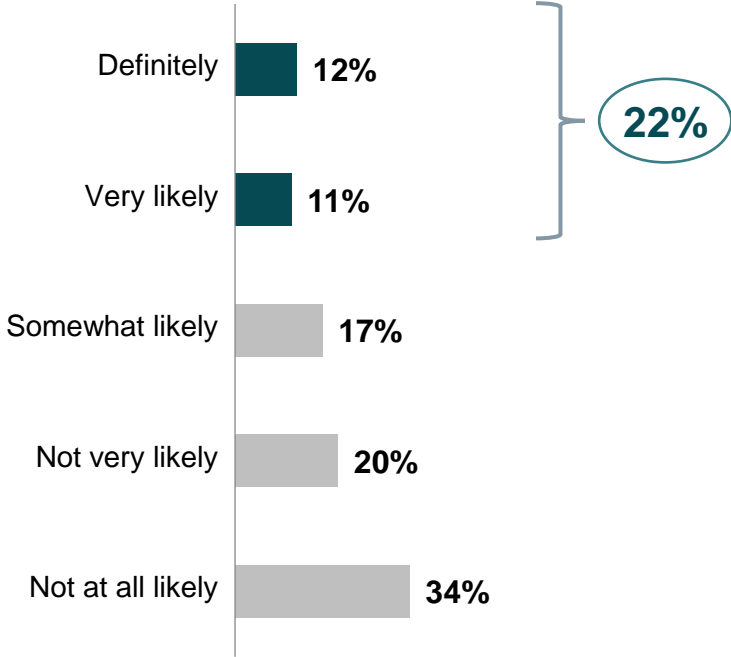
Yellowknife
Northwest Territories



Incidence of Long-Haul Holiday Travel (General Population)



Plan to Take Long-Haul Holiday Trip in Next 2 Years



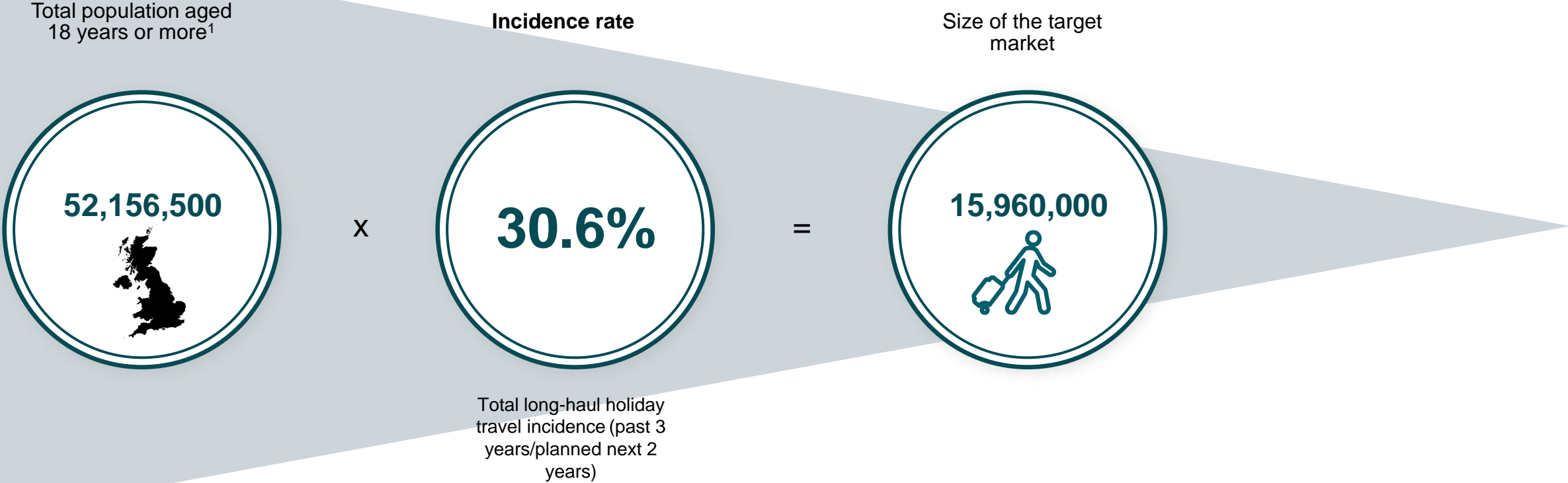
Incidence Rate



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

5 [^] 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)

Long-Haul Holiday Traveller Sizing

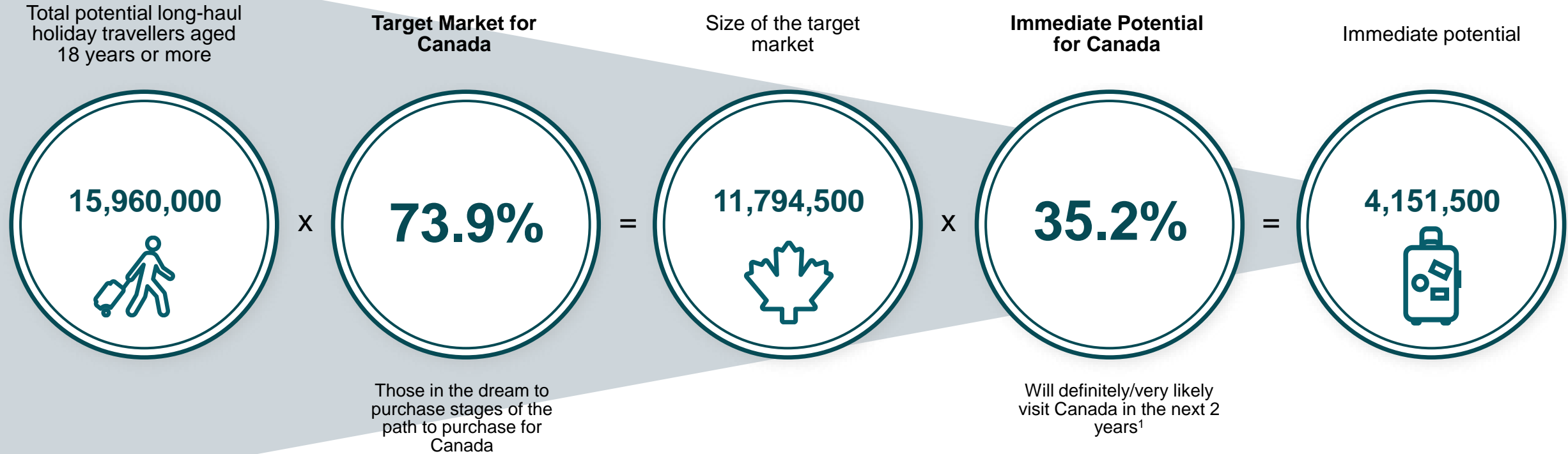


6 ¹ Source: Estimates 2022 mid-year estimates, Welsh Government National Statistics
Note: Results are from 2023 YouGov Canada Omnibus Survey
Base: General population aged 18+ (n=2244)

Potential Market Size For Canada



Size of the Potential Market to 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 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)

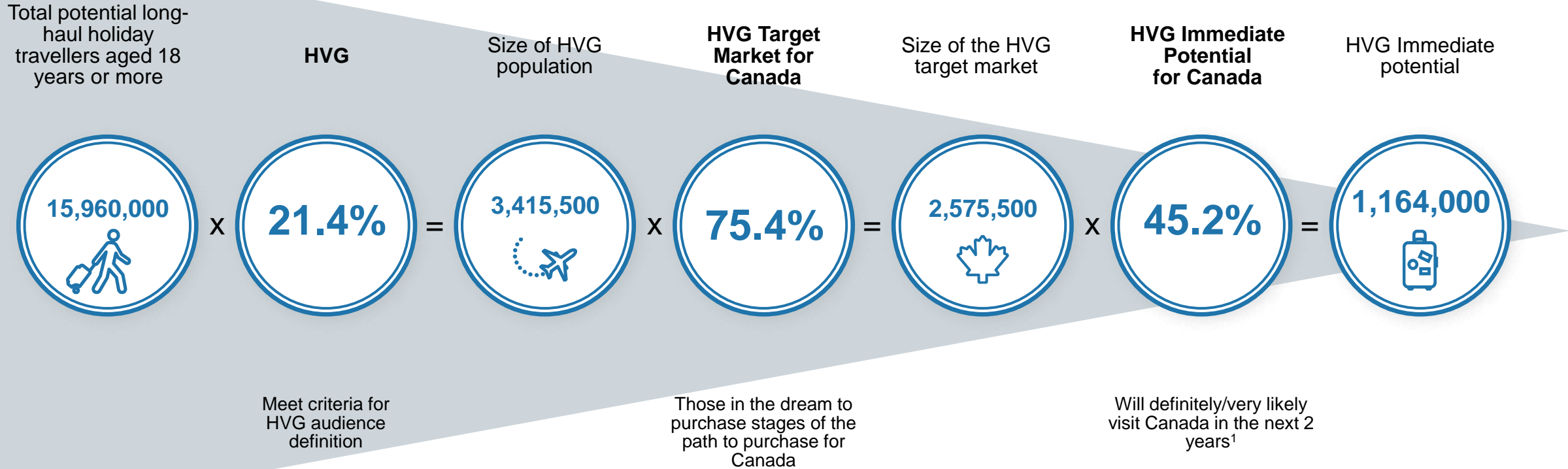
C1. Which of the following best describes your current situation when thinking about each of the following destinations for a holiday trip? (Select one for each)

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

Size of the Potential Market to Canada (Next 2 Years): *HVG Audience*



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 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)
 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 the Regions

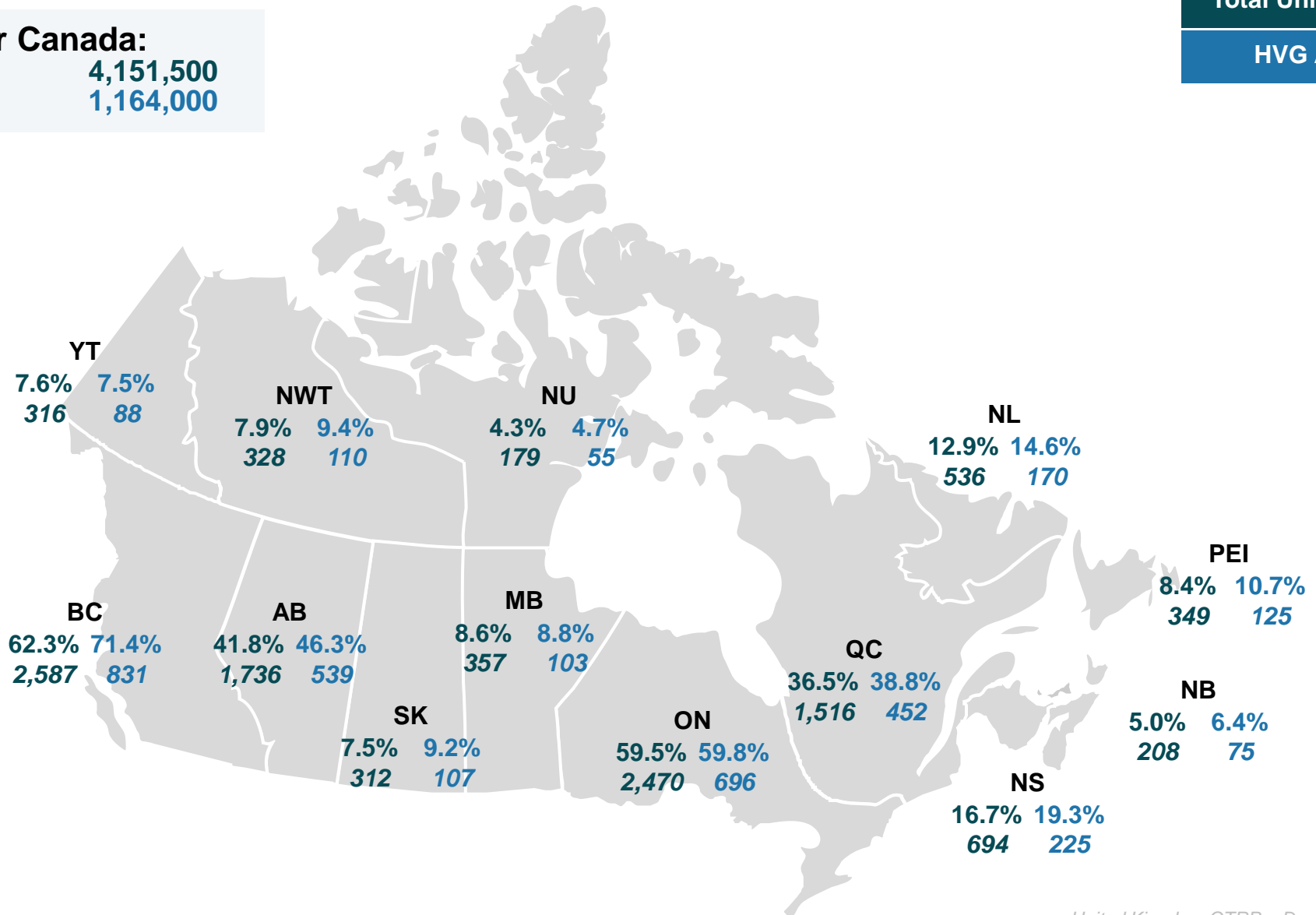


Total United Kingdom

HVG Audience

Immediate Potential for Canada:
Total United Kingdom: 4,151,500
HVG Audience: 1,164,000

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





Key Performance Indicators



Prince Albert National Park
Saskatchewan



Key Performance Indicators

Indicator	Definition	All Long-Haul Travellers (n=1532)	HVG Audience (n=333)
Unaided destination consideration	% who mentioned Canada or a destination in Canada on their consideration list ¹	11%	19%+
Aided destination consideration	% who rate Canada 4 or 5 (I am seriously considering) out of 5	44%	53%+
Aided awareness of travel opportunities in Canada	% with excellent/very good knowledge of travel opportunities in Canada	31%	38%+
Past visitation	% who have ever visited Canada for pleasure	37%	46%+

¹ For trips in the next 2 years.

Base: Long-haul holiday travellers (past 3 years or next 2 years)

B1. You mentioned that you are likely to take a long-haul holiday trip **outside of Europe, North Africa and the Mediterranean** in the next 2 years. Which destinations are you seriously considering? (Please list up to 3 destinations)

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'.

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

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?



Key Performance Indicators: Seasonal & Indigenous



Indicator	Definition	All Long-Haul Travellers	HVG Audience
Unaided <u>fall</u> destination	% who mentioned Canada or a destination in Canada ¹	16%	19%
Aided destination consideration for <u>fall</u>	% consider Canada for the months of September, October and/or November ²	51%	55%
Unaided <u>winter</u> destination	% who mentioned Canada or a destination in Canada ¹	21%	22%
Aided destination consideration for <u>winter</u>	% consider Canada for the months of December, January and/or February ²	23%	25%
Unaided <u>Indigenous Tourism</u> destination	% who mentioned Canada or a destination in Canada	12%	16%

¹Among respondents who answered about winter/fall travel

²Among those in the dream to purchase stages of the path to purchase to Canada

Base: Long-haul holiday travellers (past 3 years or next 2 years)

B2. What destinations come to mind when thinking about travel to experience the **winter** season? Total (n=736); HVG (n=165)

B3. What destinations come to mind when thinking about travel to experience the **autumn** season? Total (n=796); HVG (n=168)

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)

B4. What destinations come to mind when thinking about **Indigenous tourism**? Total (n=1532); HVG (n=333)





Market Outlook



St. John's

Newfoundland and Labrador



Market Outlook

Indicator	Definition	All Long-Haul Travellers (n=1532)	HVG Audience (n=333)
Incidence of long-haul holiday travel	% who have taken a long-haul holiday trip in the past 3 years	74%	100% +
Long-haul travel intentions	% who plan ¹ to take a long-haul holiday trip in the next 2 years	71%	100% +
Market Outlook (Net change in long-haul travel)	% who will <u>spend a little more</u> on travel outside of Europe, North Africa and the Mediterranean in the next 12 months MINUS % who will <u>spend a little less</u>	+1%	+21%

¹ Who are 'Definitely' or 'Very Likely' to take a long-haul trip in the next 2 years.

Base: Long-haul holiday travellers (past 3 years or next 2 years)

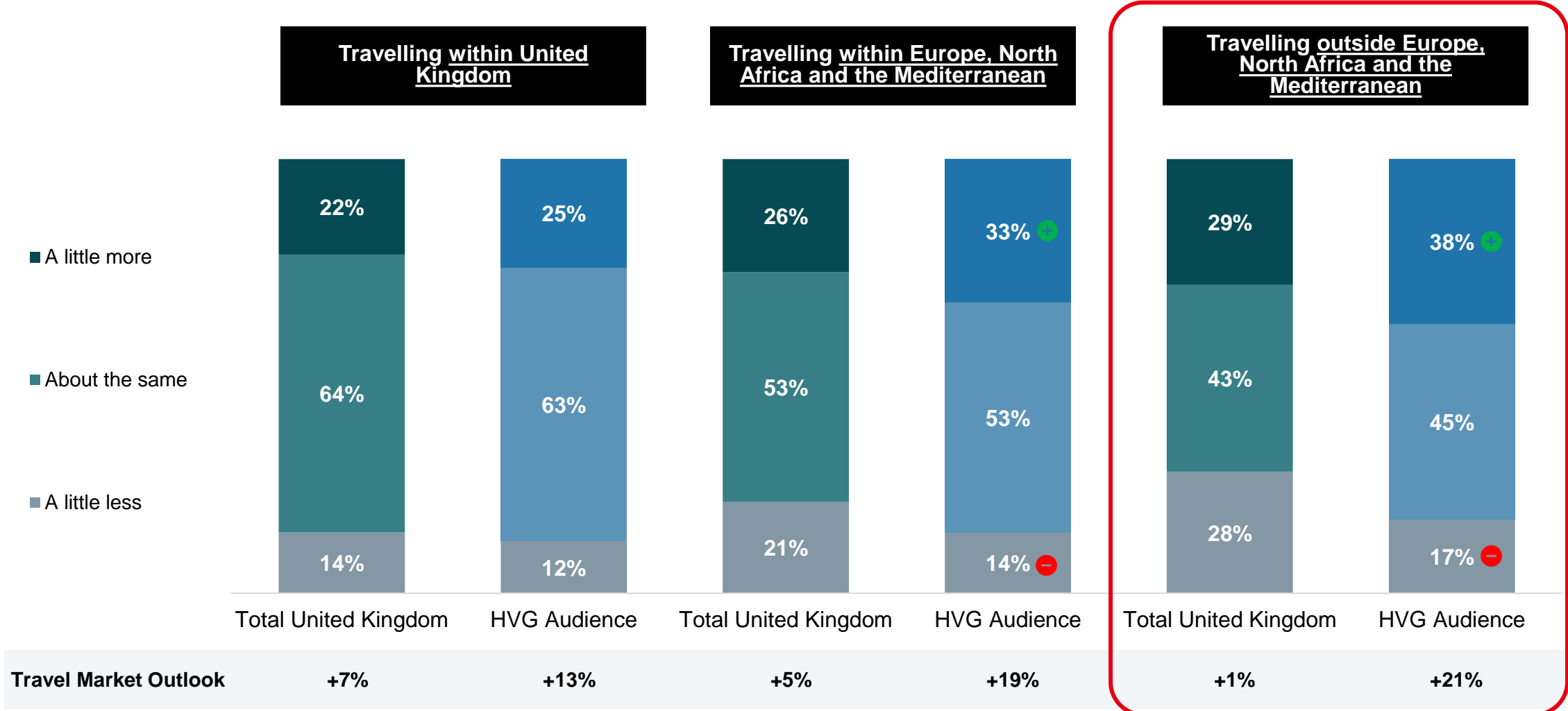
A7. In the past 3 years, have you taken a long-haul holiday trip of 4 or more nights **outside of Europe, North Africa and the Mediterranean** where you spent at least 1 night in paid accommodations? (Select one only)

A9. In the next 2 years, how likely is it that you will take a long-haul holiday trip of 4 or more nights **outside of Europe, North Africa and the Mediterranean** where you will spend at least 1 night in paid accommodations? (Select one only)

A5. How would you describe your spending intentions on the following items in the next 12 months compared to the 12 months? Will you spend...



Spending Intentions (in Next 12 Months)

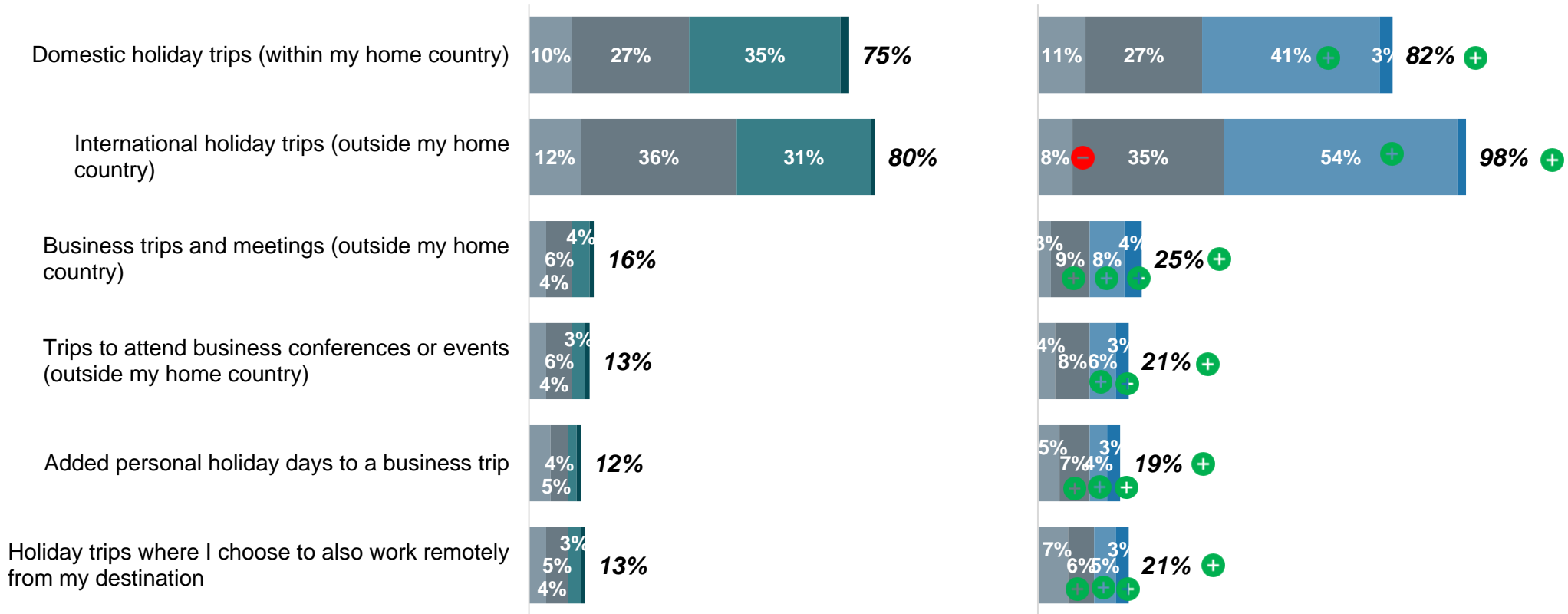


Types of Travel Trips

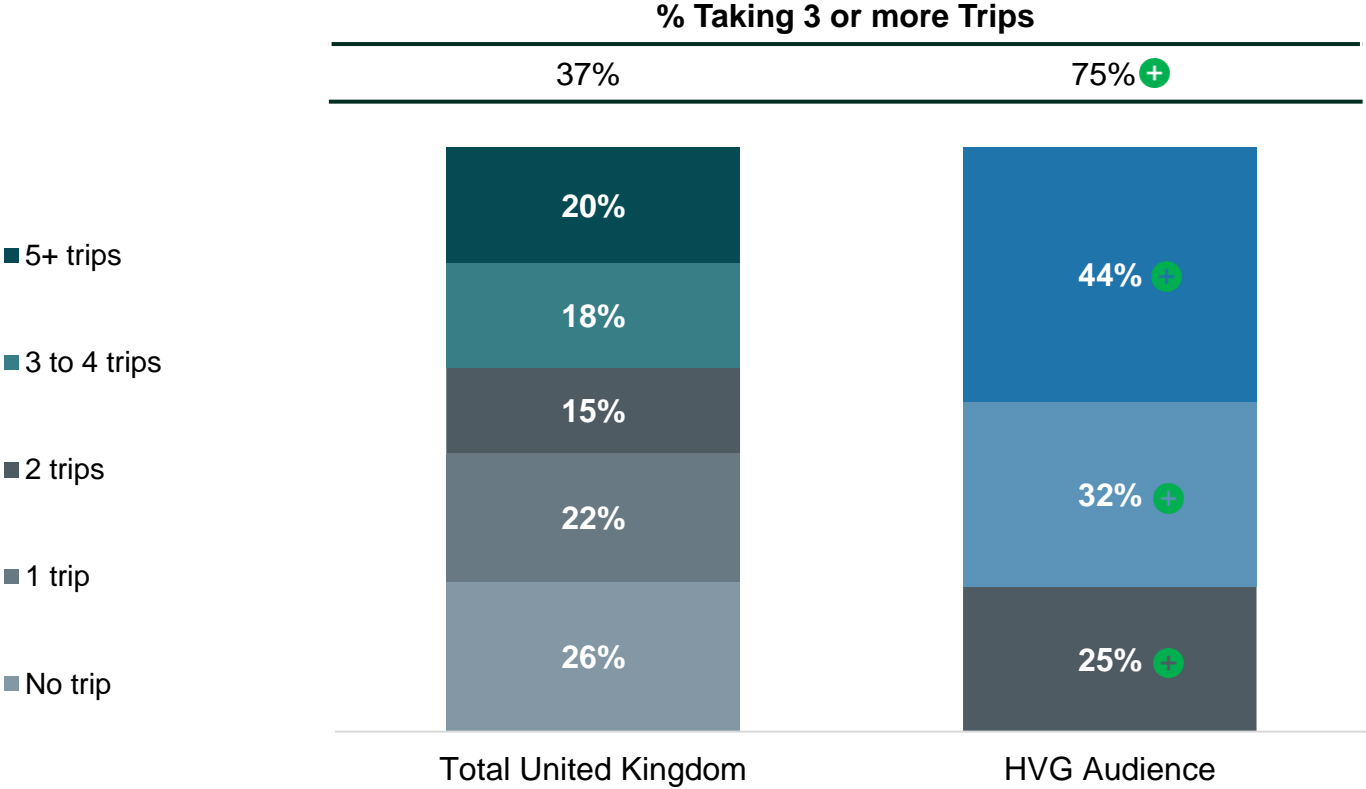
Total United Kingdom

HVG Audience

■ Sometimes (once every 2 years) ■ Regularly (once a year) ■ Often (several times a year) ■ Very often (about once a month or more) ■ At least every 2 years




Long-Haul Travel Intensity





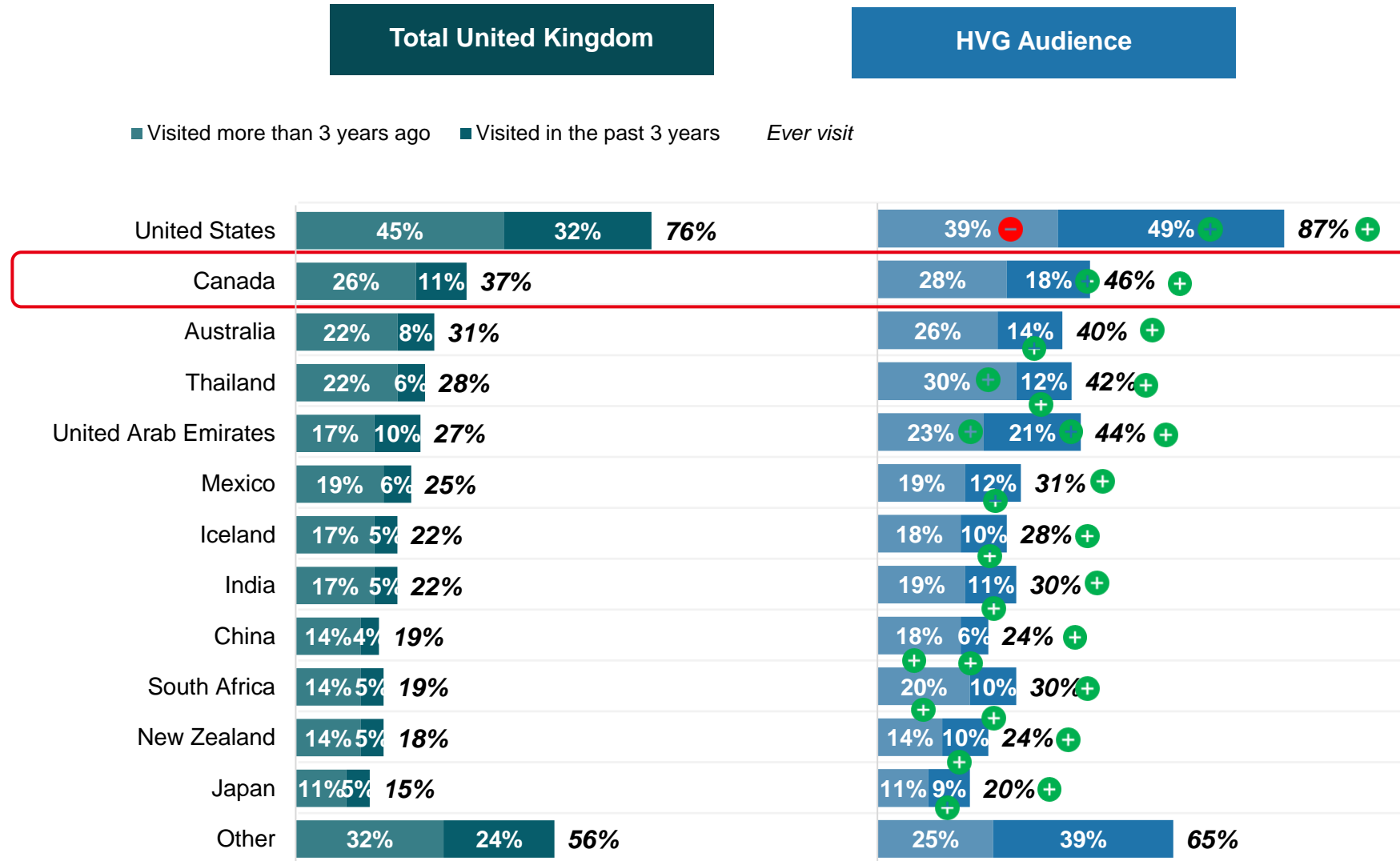
Canada vs. Competitors



 Peggy's Cove
Nova Scotia



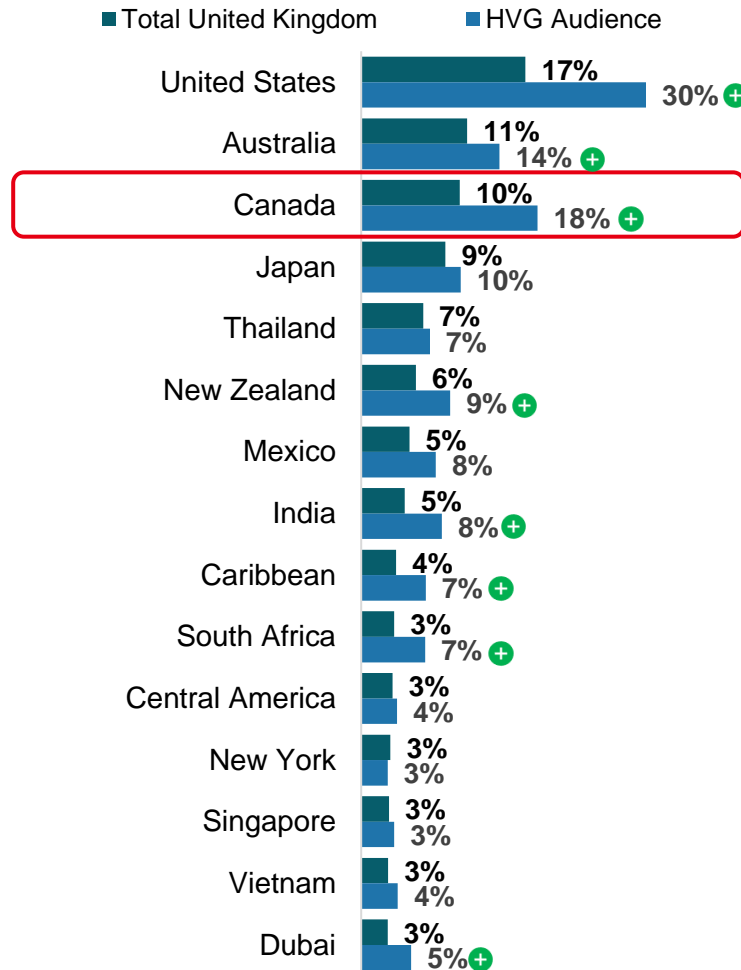
Past Visitation



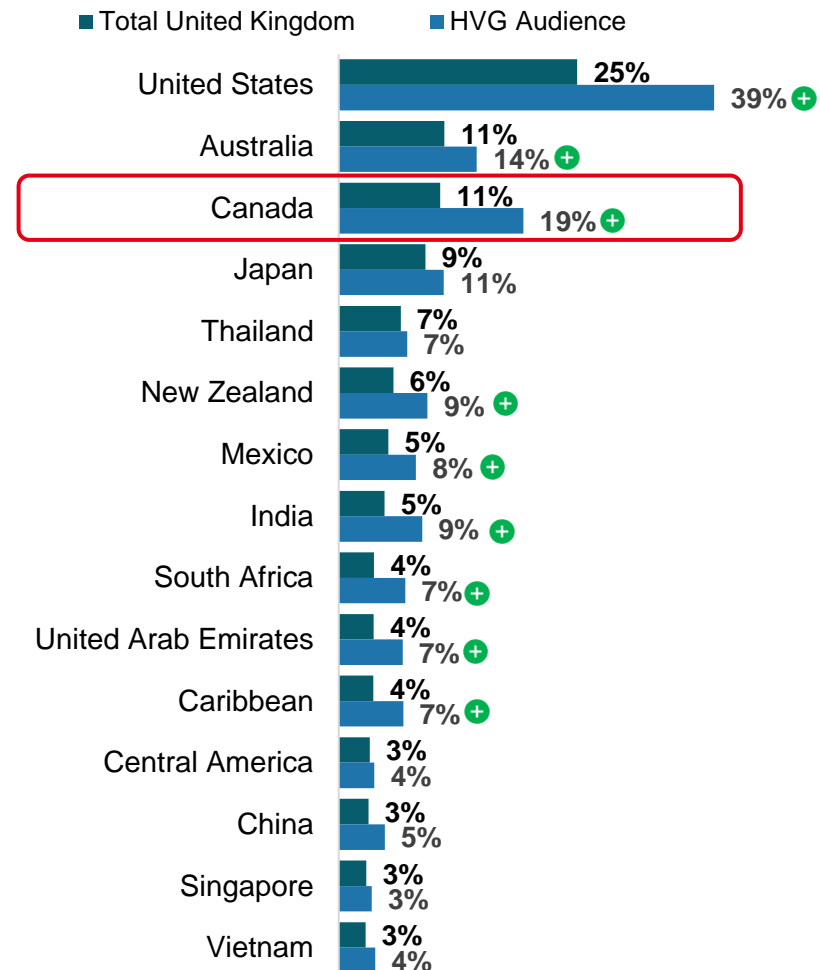
Unaided Long-Haul Destination Consideration (Next 2 Years)



Top Destination Brands¹



Top Destinations²



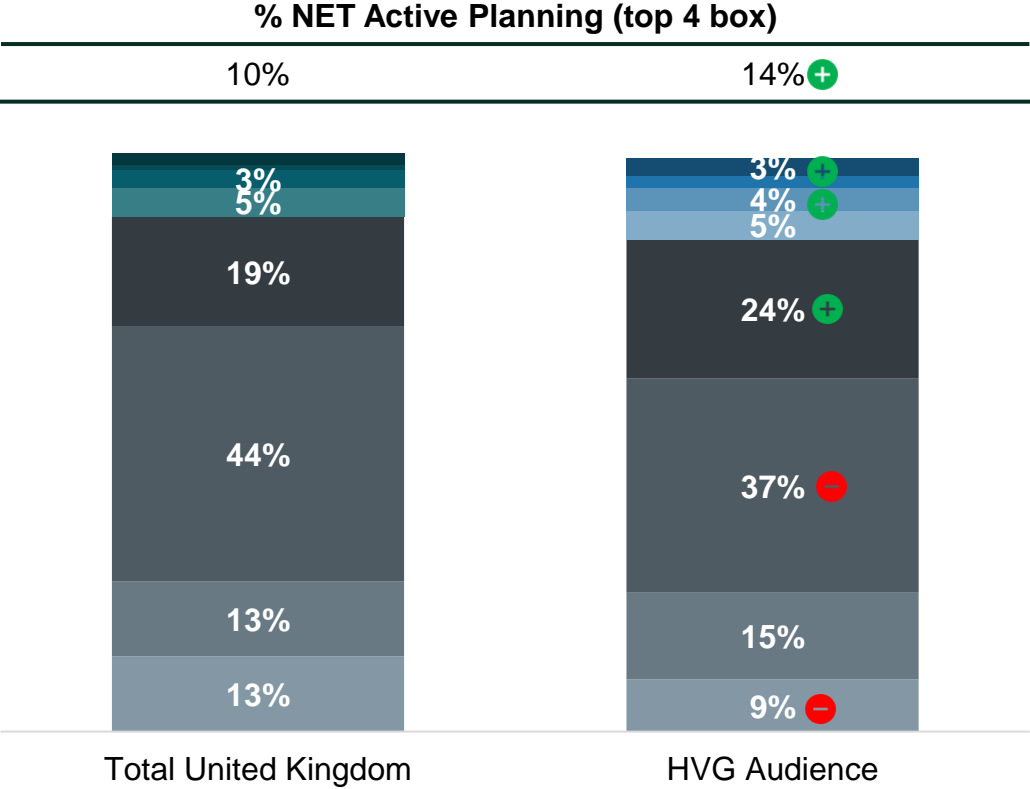
¹ Responses as mentioned by respondents (e.g., percentage who said "Canada" specifically).
² Roll-up of brand mentions by country (e.g., percentage who said "Canada" or any destination in Canada).
 Base: Long-haul holiday travellers (past 3 years or next 2 years) (n=1532); HVG (n=333)
 B1. You mentioned 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)



Path to Purchase 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



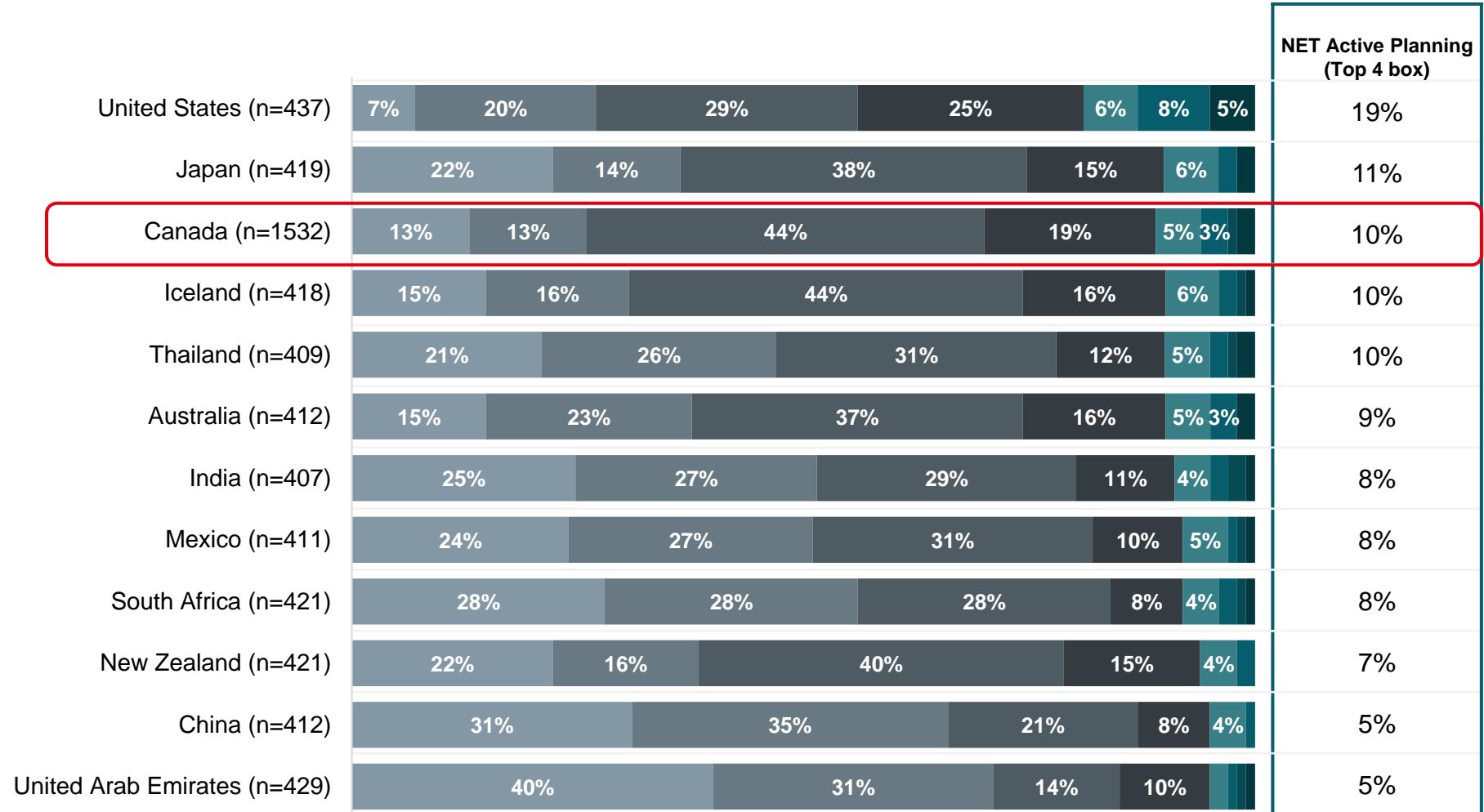
21 Note: all respondents evaluated Canada plus 3 randomly selected countries from the competitive set. Base: Long-haul holiday travellers (past 3 years or next 2 years) (n=1532); HVG (n=333)

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)

Stage in the Purchase Cycle: Total United Kingdom



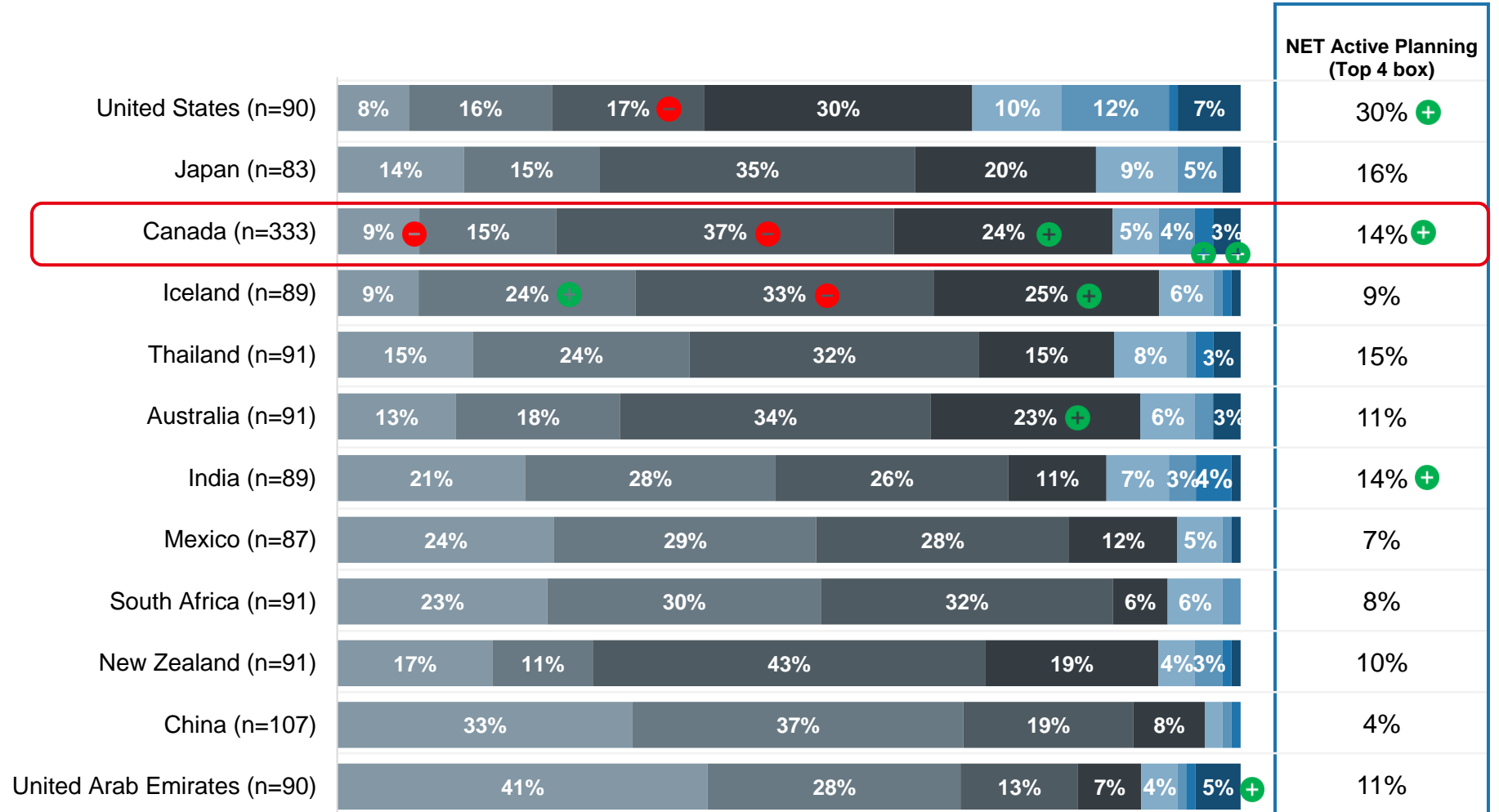
- Have never thought of taking a trip to this destination
- Not interested in visiting / returning in the foreseeable future
- Dreaming about visiting / returning someday
- Seriously considering visiting / returning in the next 2 years
- Have started to gather some travel information for a trip to this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



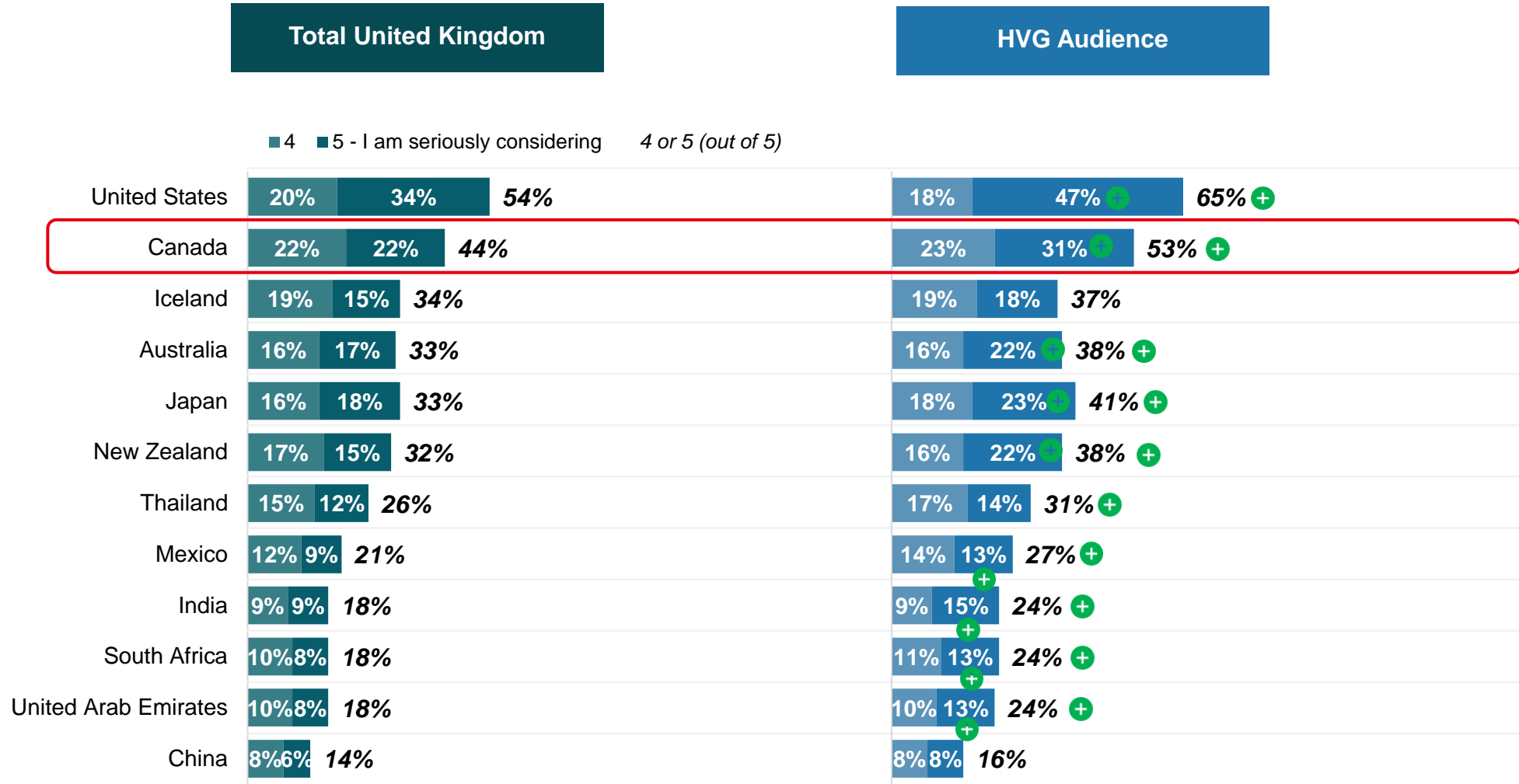
Stage in the Purchase Cycle: Among HVG Audience



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



Destination Consideration (Next 2 Years)



Destination Consideration By Seasons

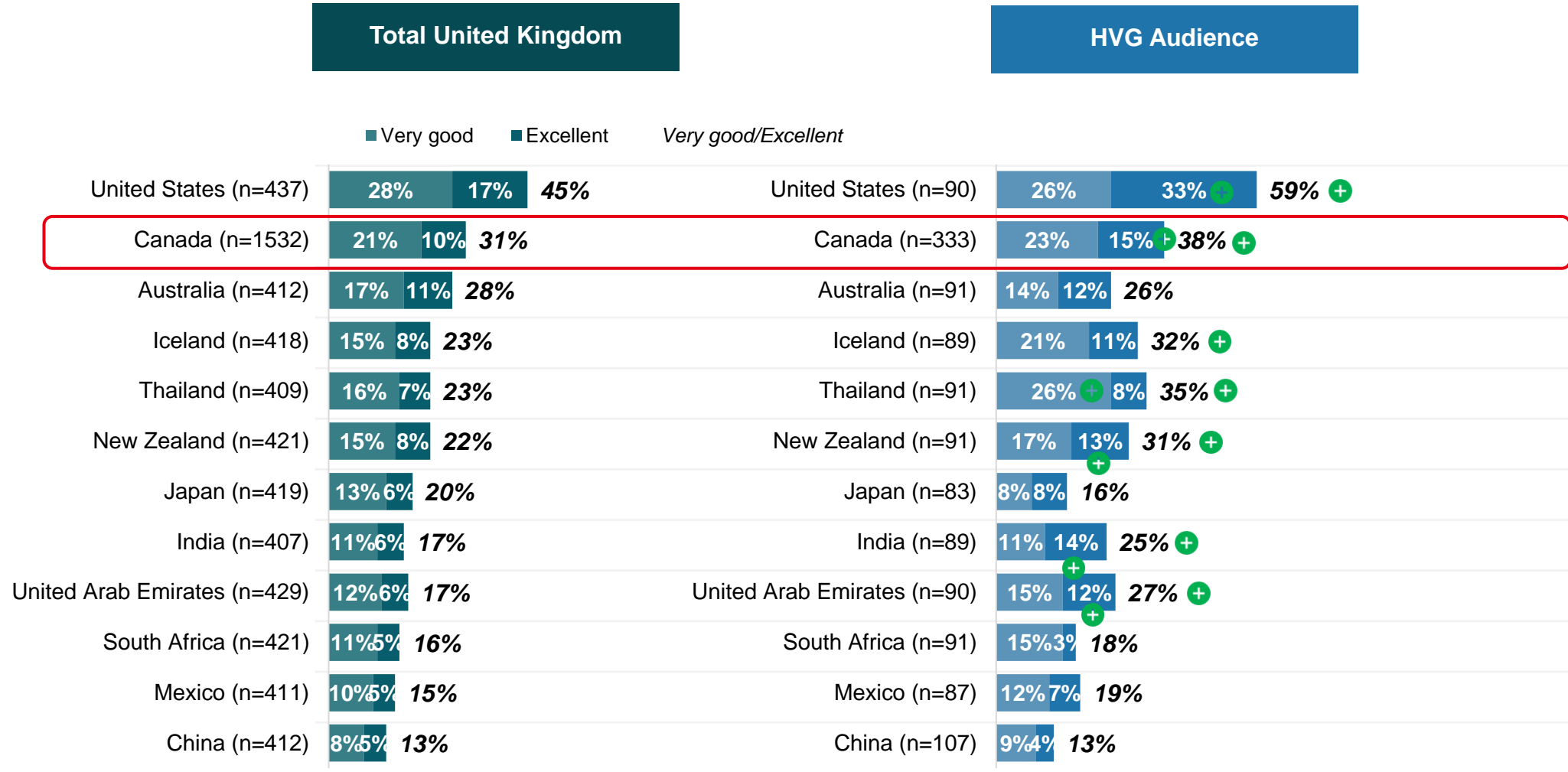


Total United Kingdom	Winter (Dec, Jan, Feb)	Spring (Mar, Apr, May)	Summer (Jun, Jul, Aug)	Fall (Sept, Oct, Nov)
Australia (n=256)	53%	43%	32%	47%
Canada (n=1133)	23%	41%	56%	51%
China (n=139)	20%	42%	35%	37%
Iceland (n=289)	42%	44%	43%	49%
India (n=195)	38%	36%	23%	37%
Japan (n=266)	21%	51%	41%	40%
Mexico (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%



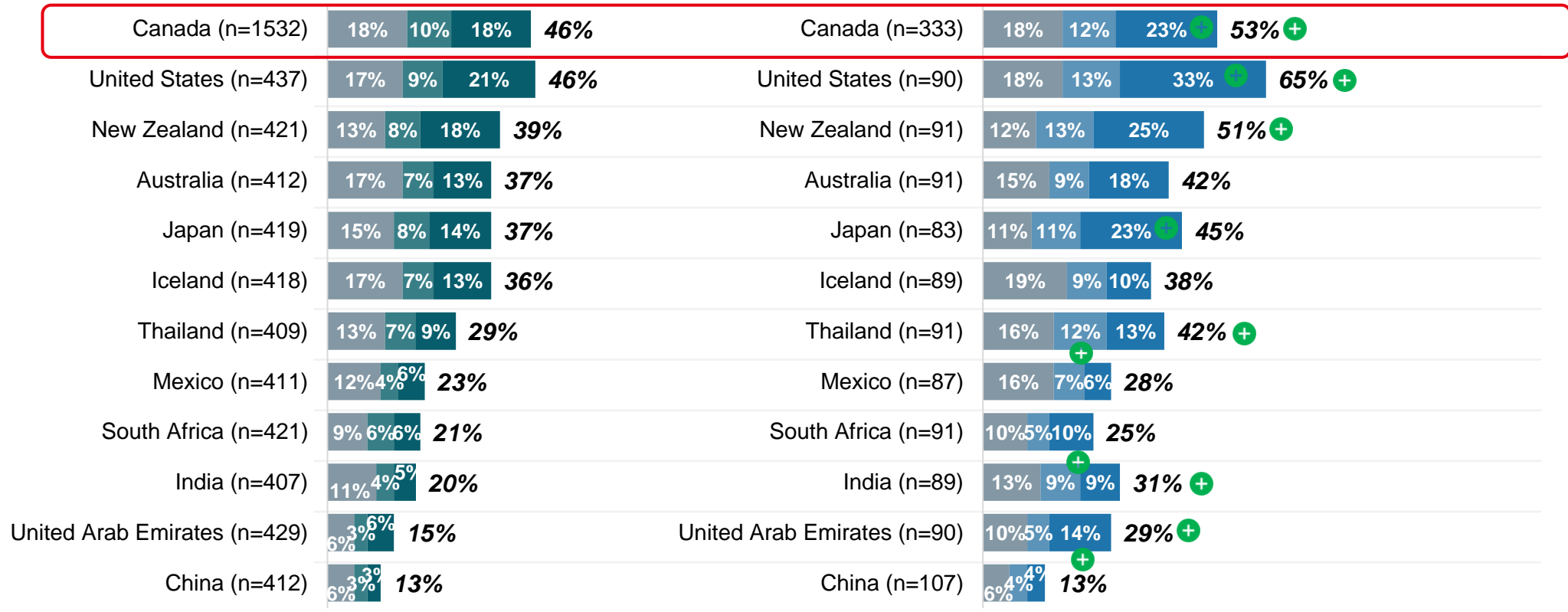
Knowledge of Holiday Opportunities



Total United Kingdom

HVG Audience

■ 8 ■ 9 ■ 10 - Exactly what I'm looking for *Top 3 box*

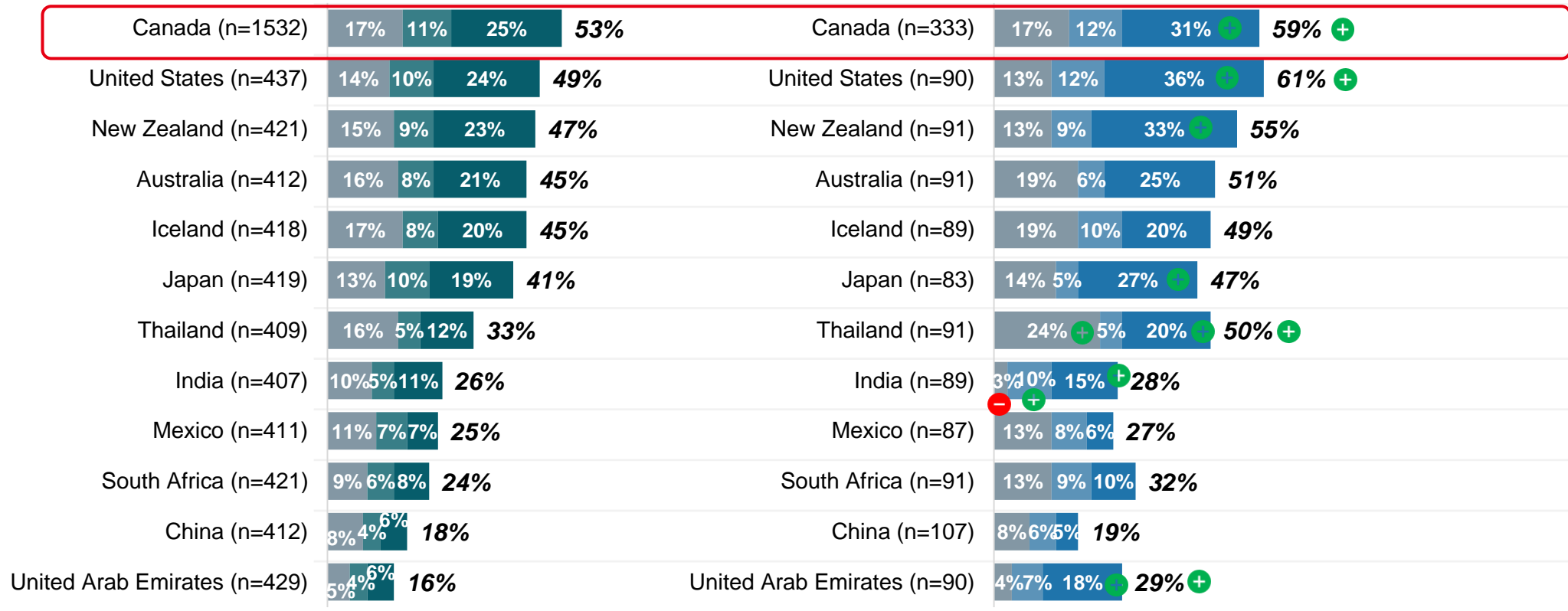


Destination Appeal

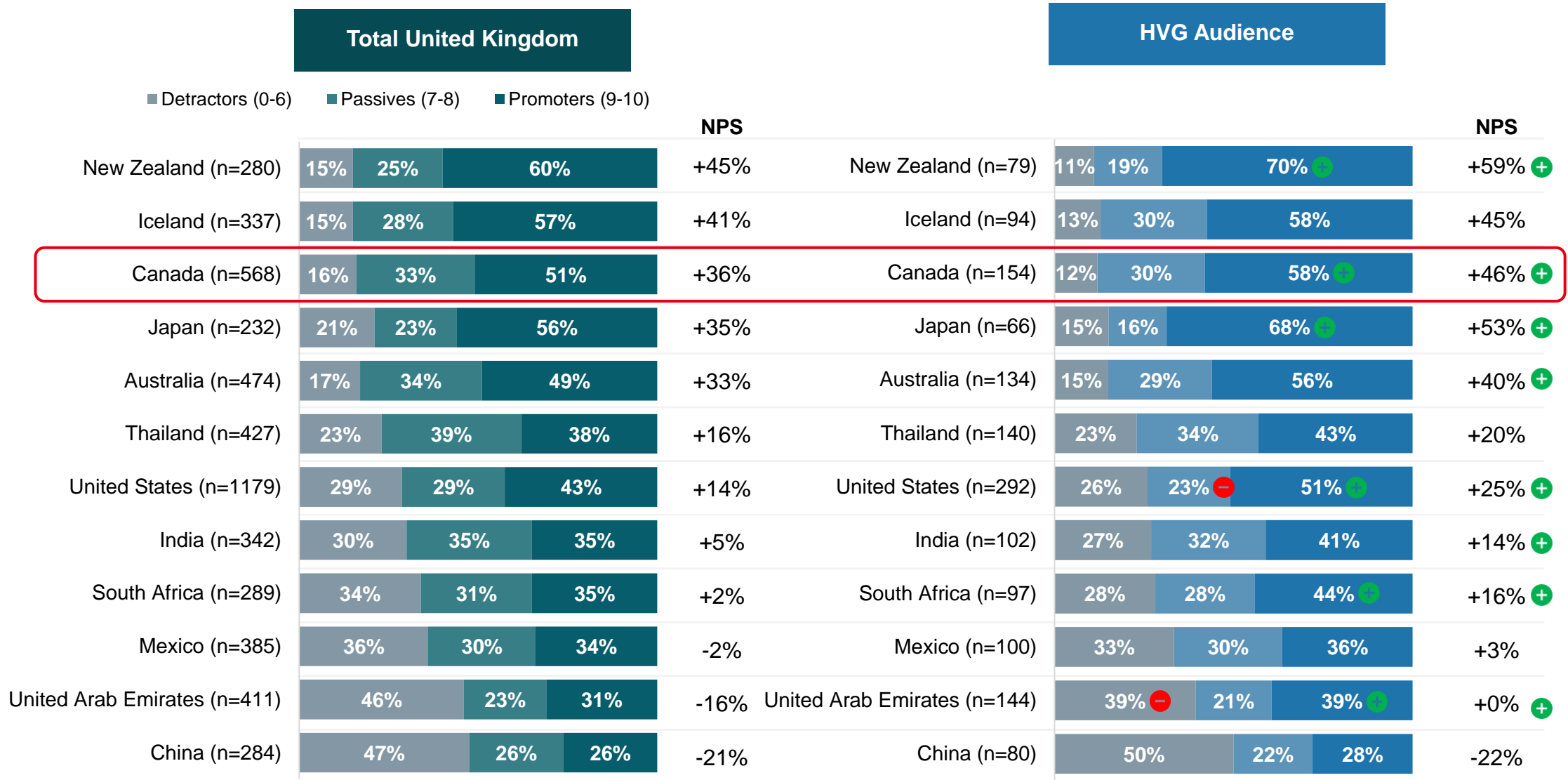
Total United Kingdom

HVG Audience

■ 8 ■ 9 ■ 10 - Agree completely *Top 3 box*



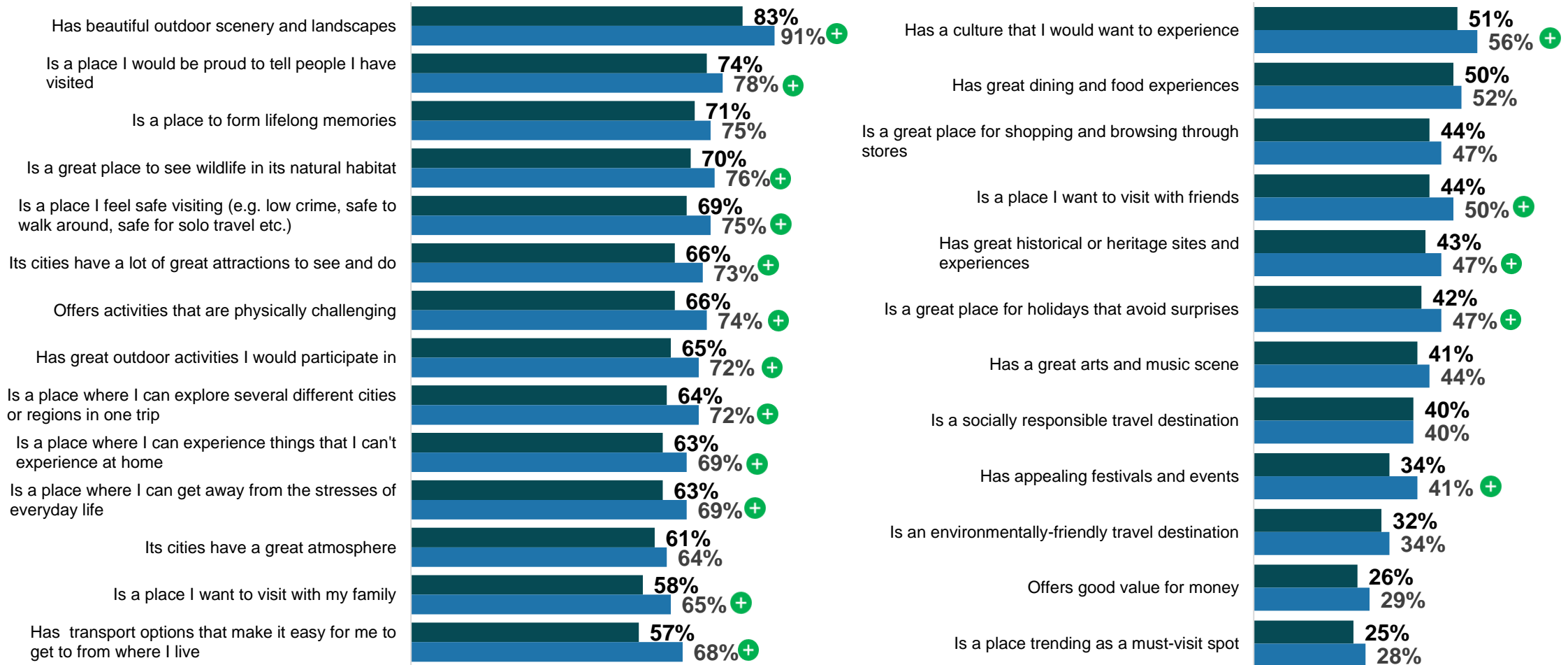
Net Promoter Score (NPS)



Impressions of Canada as a Holiday Destination



■ Total United Kingdom ■ HVG Audience



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) (n=1532); HVG (n=333) 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	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												
	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.)												
	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	Offers activities that are physically challenging												
	Is a great place for shopping and browsing through stores												
	Its cities have a lot of great attractions to see and do												
	Has great outdoor activities I would participate in												
	Has great dining and food experiences												
	Has a great arts and music scene												
	Has appealing festivals and events												
To-See	Its cities have a great atmosphere												
	Has beautiful outdoor 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												

Strength Weakness

United Kingdom GTRP – December 2023



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.

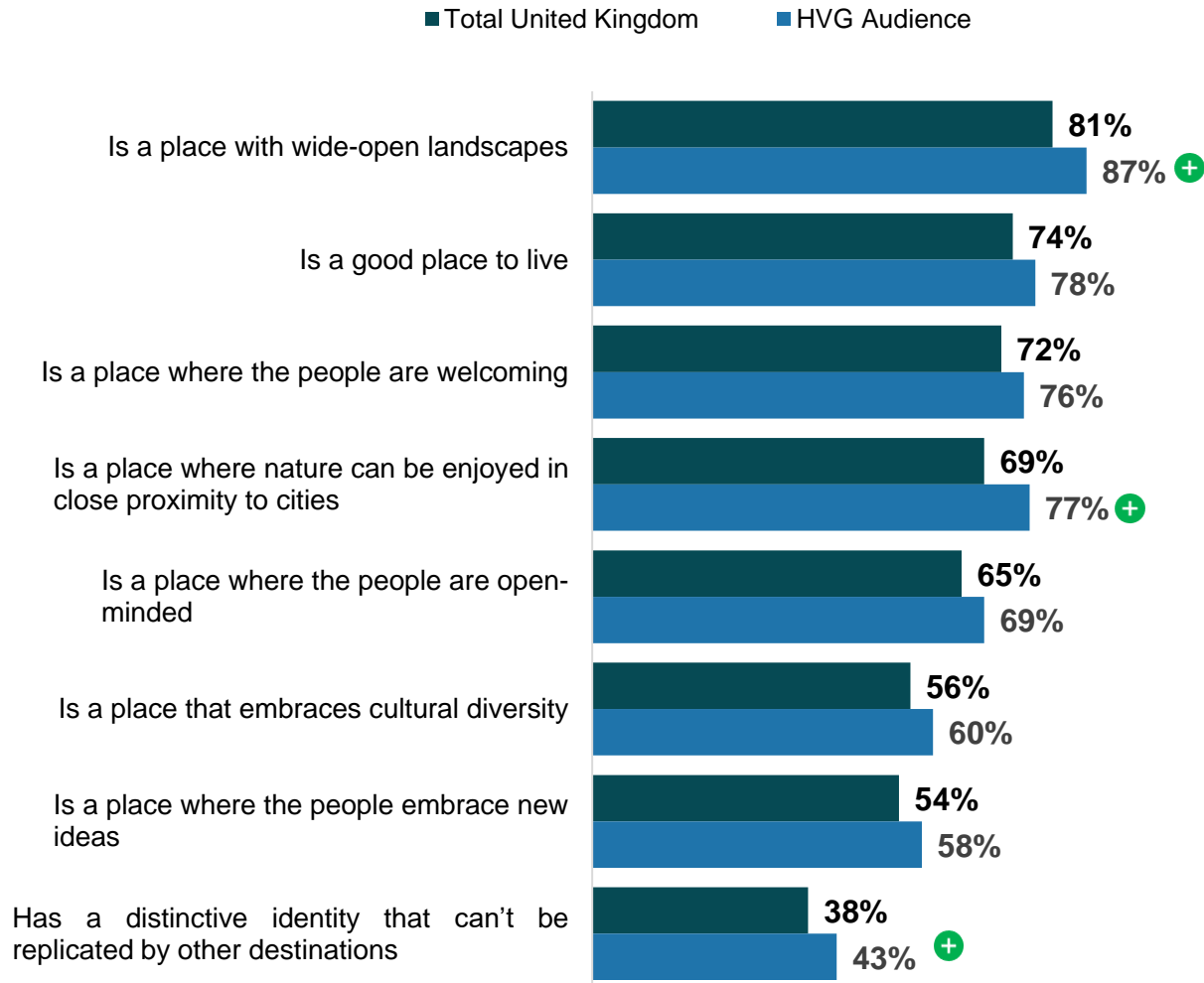
Destination Attributes – Relative Strengths & Weaknesses : Among HVG Audience



		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												
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	Weakness
	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

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 for Canada



Brand Value Statements: Among Total United Kingdom



	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

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 HVG Audience

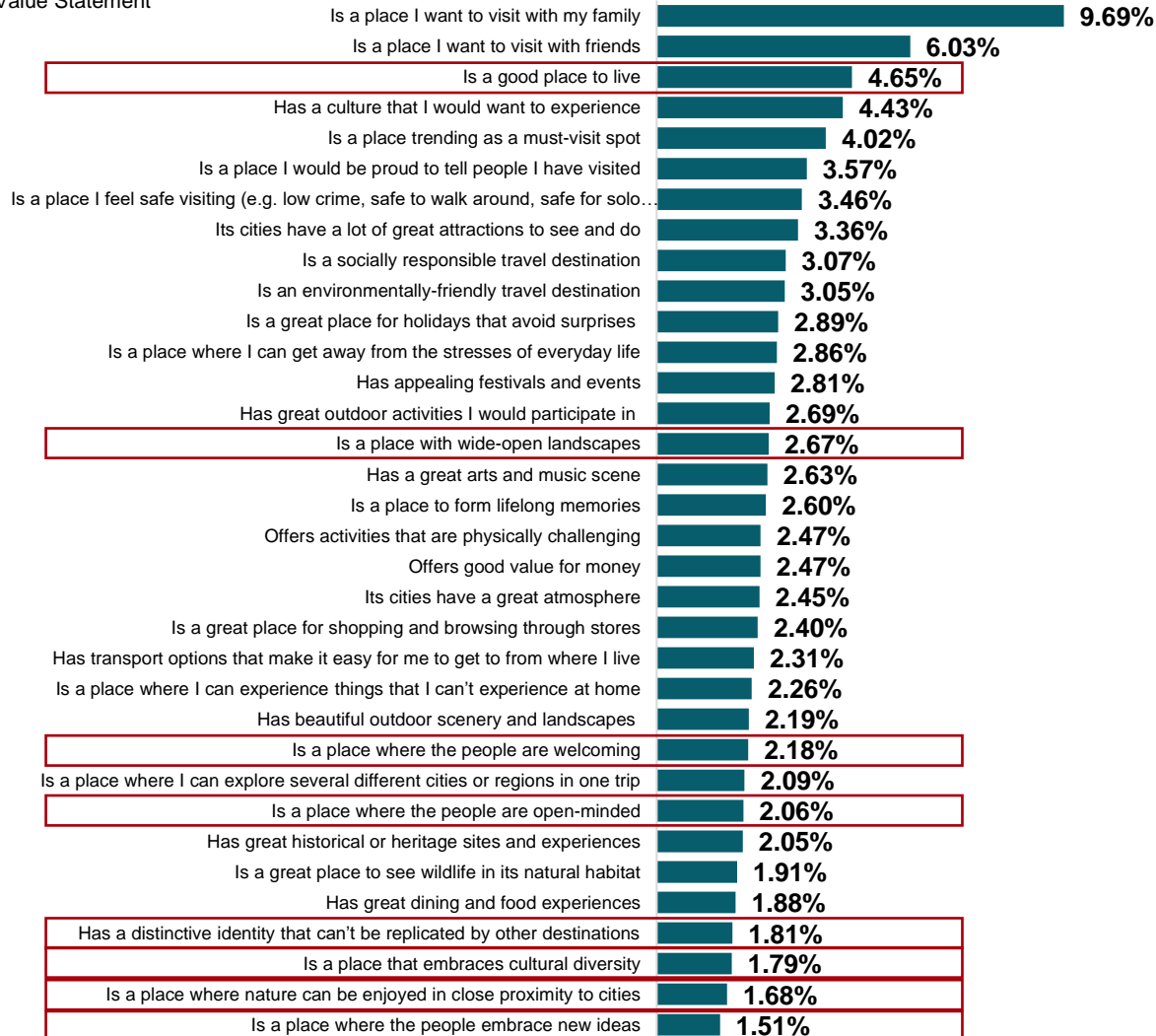


	Canada	Australia	China	Iceland	India	Japan	Mexico	New Zealand	South Africa	Thailand	United Arab Emirates	United States
n=	333	91	107	89	89	83	87	91	91	91	90	90
Is a place with wide-open landscapes		Strength		Strength		Weakness	Weakness		Strength	Weakness		
Is a place where nature can be enjoyed in close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

Destination Attributes: Drivers Analysis: Among Total United Kingdom



= Brand Value Statement



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

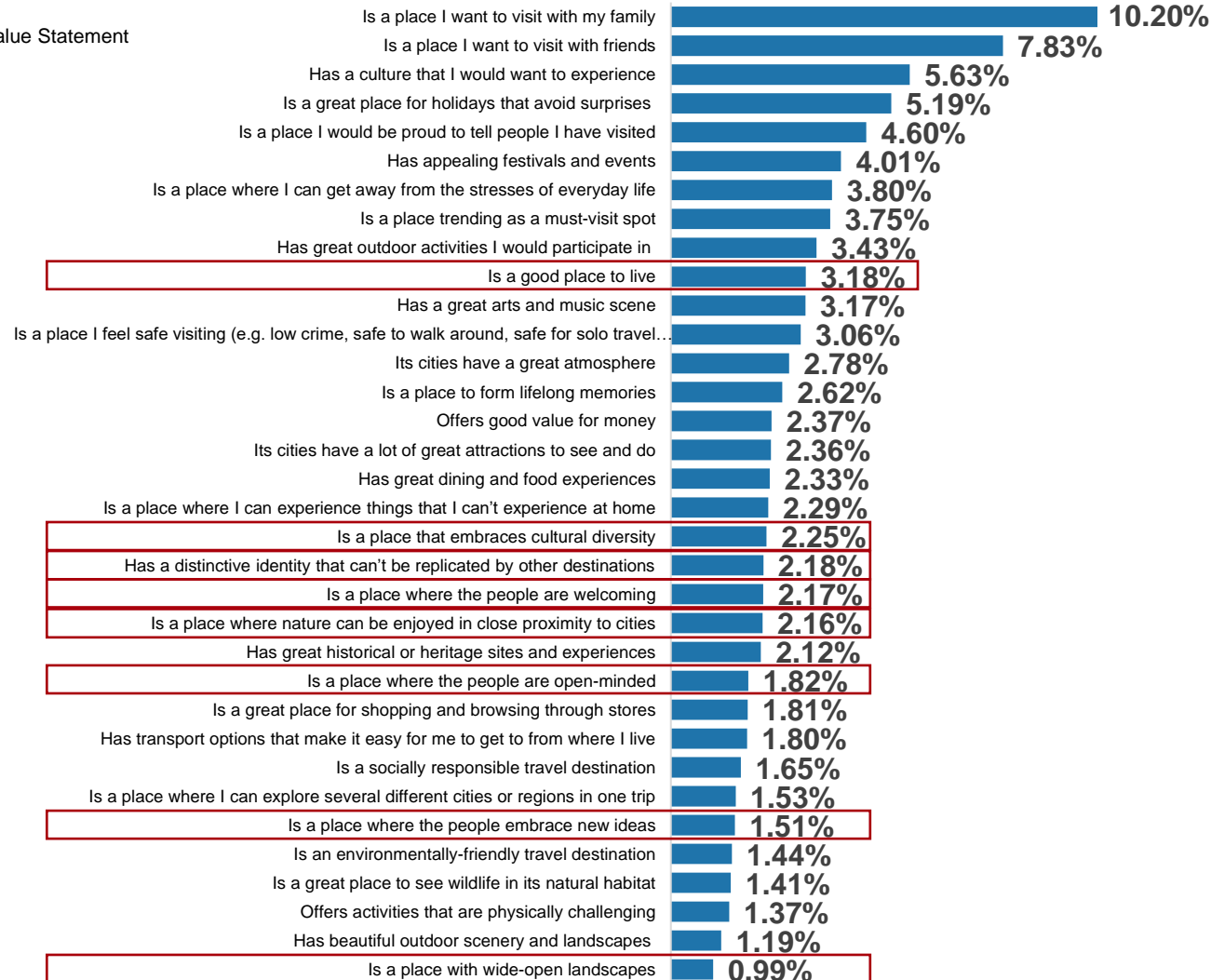
Attributes with a high percentage level are more likely to impact consideration of a destination. This generally means that destinations that score highly on the top attributes may have higher consideration levels. Each percentage does also indicate the degree of relative impact. An attribute with a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



Destination Attributes: Drivers Analysis: Among HVG Audience



= Brand Value Statement



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.

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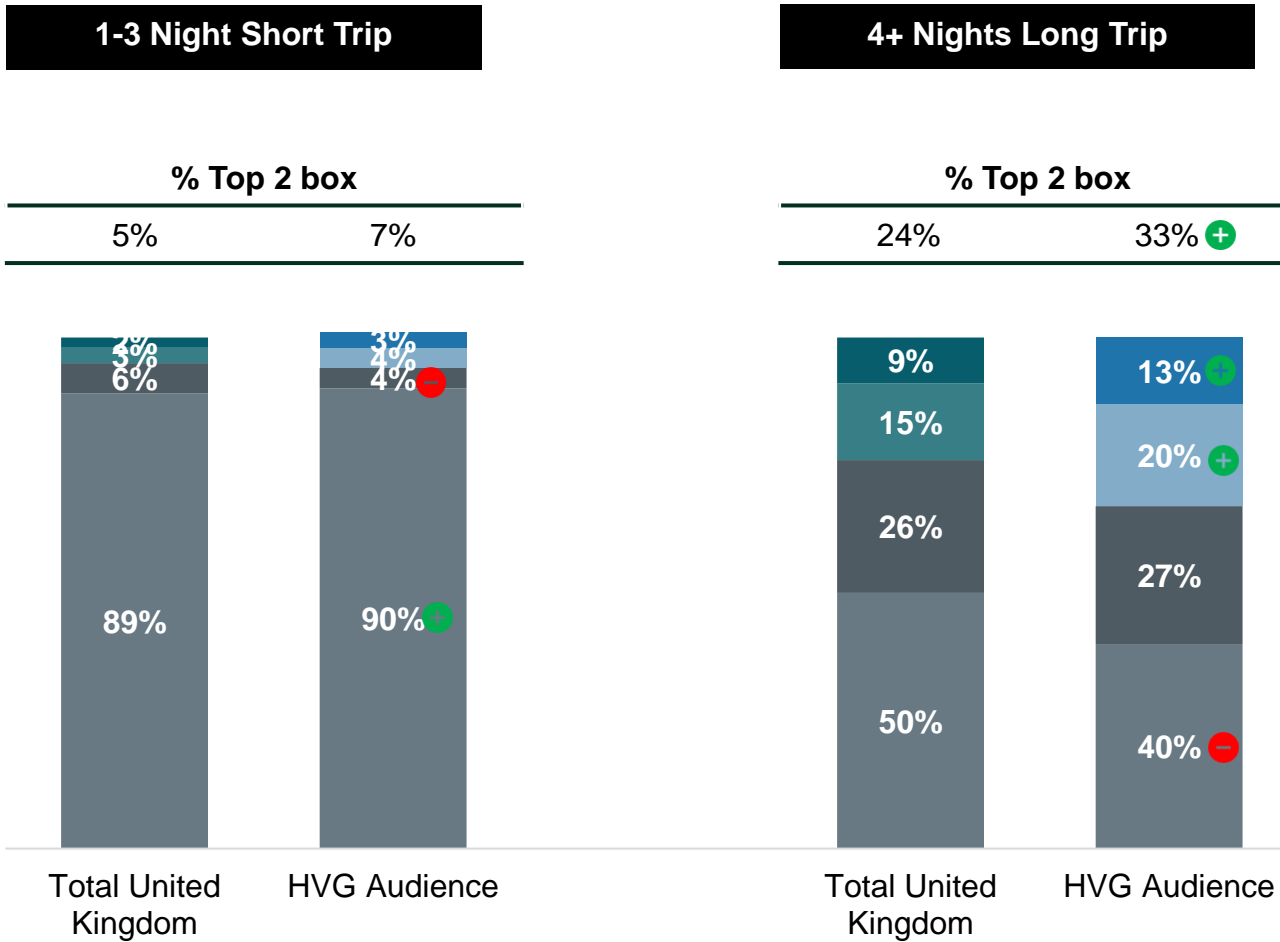
Travel Intentions to Canada



Toronto
Ontario



Likelihood to Take a Holiday Trip to Canada (Next 2 Years)

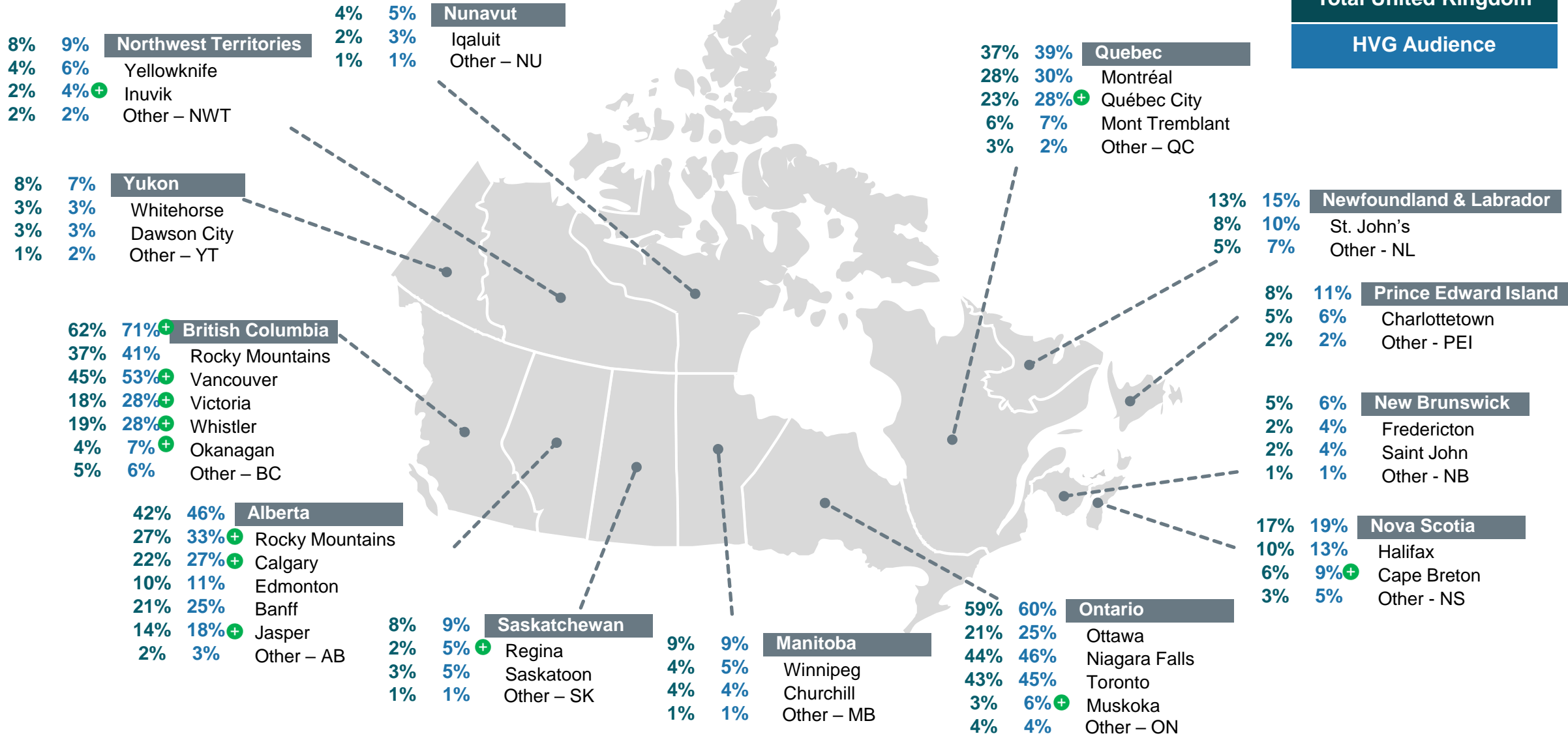


**NET: Definitely/
Very Likely to
visit Canada in
the next 2 years**

Total: 26%
HVG: 34%+

39 Note: "Not interested" is comprised of those saying not very likely, not at all likely, or indicating no intention to visit Canada
Base: Long-haul holiday travellers (past 3 years or next 2 years) (n=1532); HVG (n=333)
E1. Realistically, how likely are you to take a holiday trip to Canada in the **next 2 years**? (Select one)

Canadian Destinations Likely to Visit



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



Total United Kingdom

HVG Audience

Northwest Territories

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

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

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

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

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

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

1%	1%	Winter (Dec, Jan, Feb)
2%	3%	Spring (Mar, Apr, May)
3%	6%+	Summer (Jun, Jul, Aug)
3%	3%	Fall (Sept, Oct, Nov)

Alberta

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

New Brunswick

1%	2%+	Winter (Dec, Jan, Feb)
2%	2%	Spring (Mar, Apr, May)
2%	3%	Summer (Jun, Jul, Aug)
2%	2%	Fall (Sept, Oct, Nov)

Saskatchewan

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

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

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

Nova Scotia

1%	3%+	Winter (Dec, Jan, Feb)
4%	4%	Spring (Mar, Apr, May)
7%	7%	Summer (Jun, Jul, Aug)
6%	5%	Fall (Sept, Oct, Nov)



Barriers for Visiting Canada





Travel Behaviours



Top 10 Activities Interested In & Trip Anchors

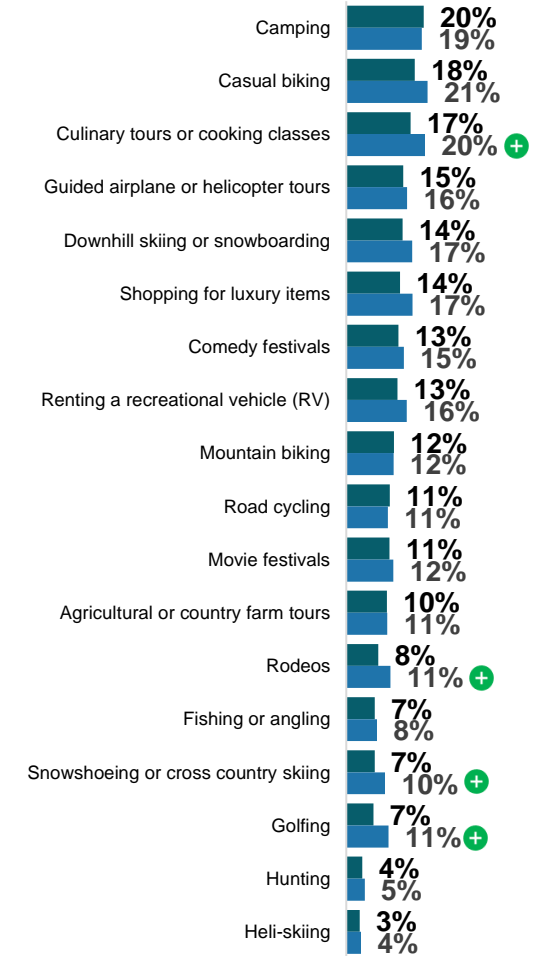
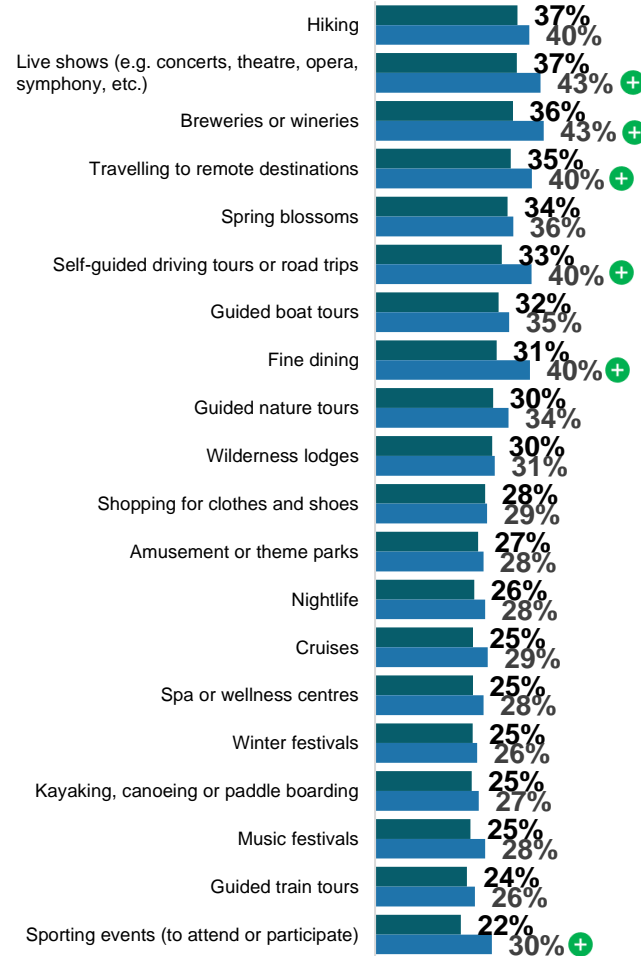
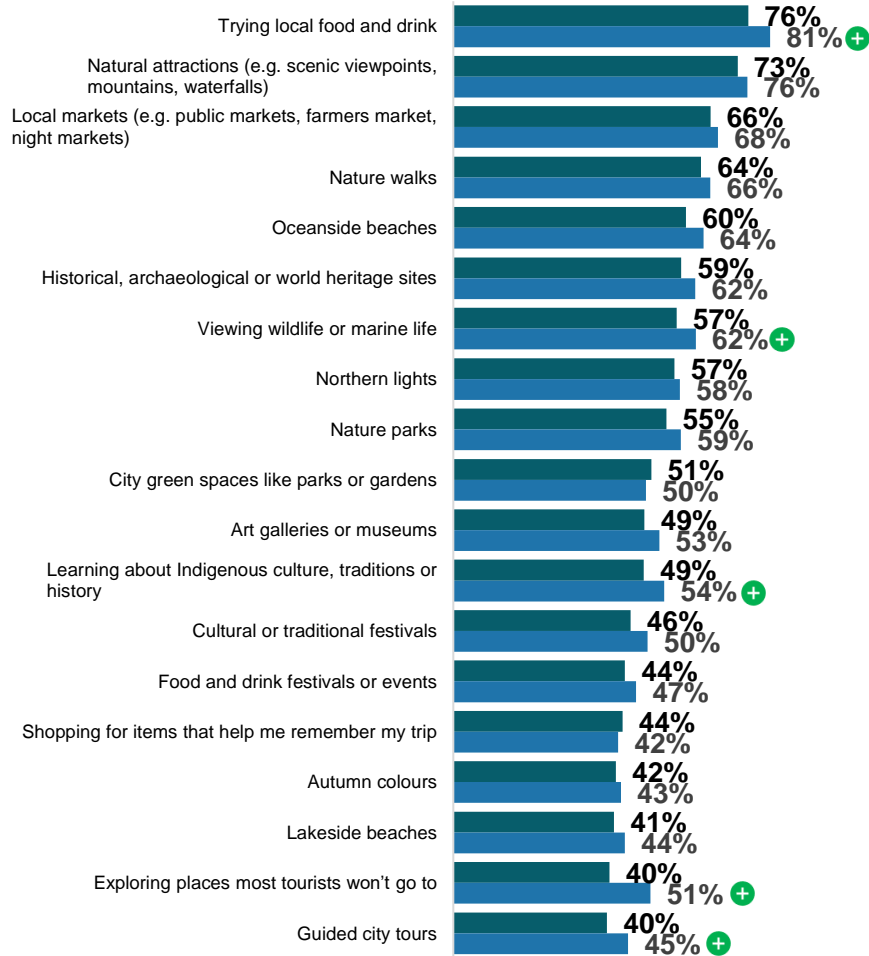
Top 10 General Activities Interested In	
Total United Kingdom (n=1532)	HVG Audience (n=333)
Trying local food and drink	Trying local food and drink +
Natural attractions (e.g. scenic viewpoints, mountains, waterfalls)	Natural attractions (e.g. scenic viewpoints, mountains, waterfalls)
Local markets (e.g. public markets, farmers market, night markets)	Local markets (e.g. public markets, farmers market, night markets)
Nature walks	Nature walks
Oceanside beaches	Oceanside beaches
Historical, archaeological or world heritage sites	Viewing wildlife or marine life +
Viewing wildlife or marine life	Historical, archaeological or world heritage sites
Northern lights	Nature parks
Nature parks	Northern lights
City green spaces like parks or gardens	Learning about Indigenous culture, traditions or history +

Top 10 Trip Anchor Activities	
Total United Kingdom (n=1521)	HVG Audience (n=331)
Natural attractions (e.g. scenic viewpoints, mountains, waterfalls)	Natural attractions (e.g. scenic viewpoints, mountains, waterfalls)
Northern lights	Northern lights
Historical, archaeological or world heritage sites	Historical, archaeological or world heritage sites
Viewing wildlife or marine life	Oceanside beaches +
Oceanside beaches	Viewing wildlife or marine life
Trying local food and drink	Trying local food and drink
Nature walks	Travelling to remote destinations +
Learning about Indigenous culture, traditions or history	Nature walks
Nature parks	Cruises +
Travelling to remote destinations	Learning about Indigenous culture, traditions or history



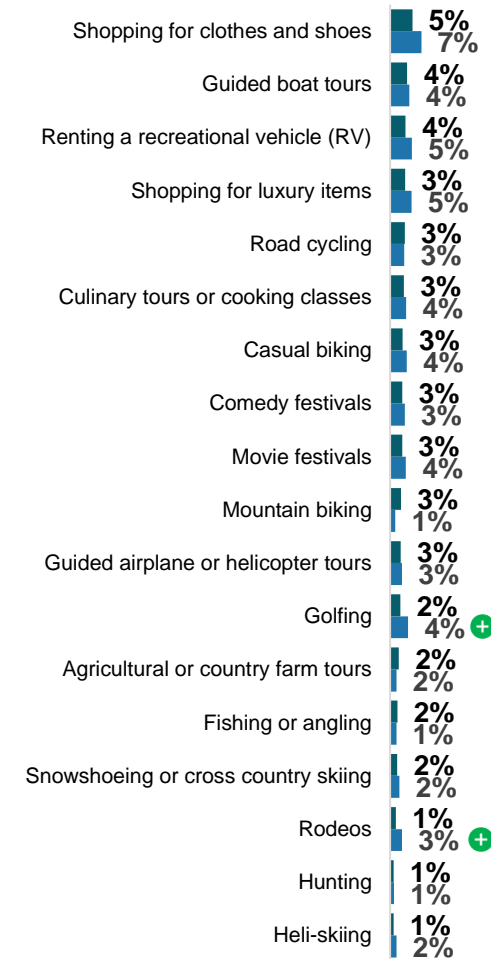
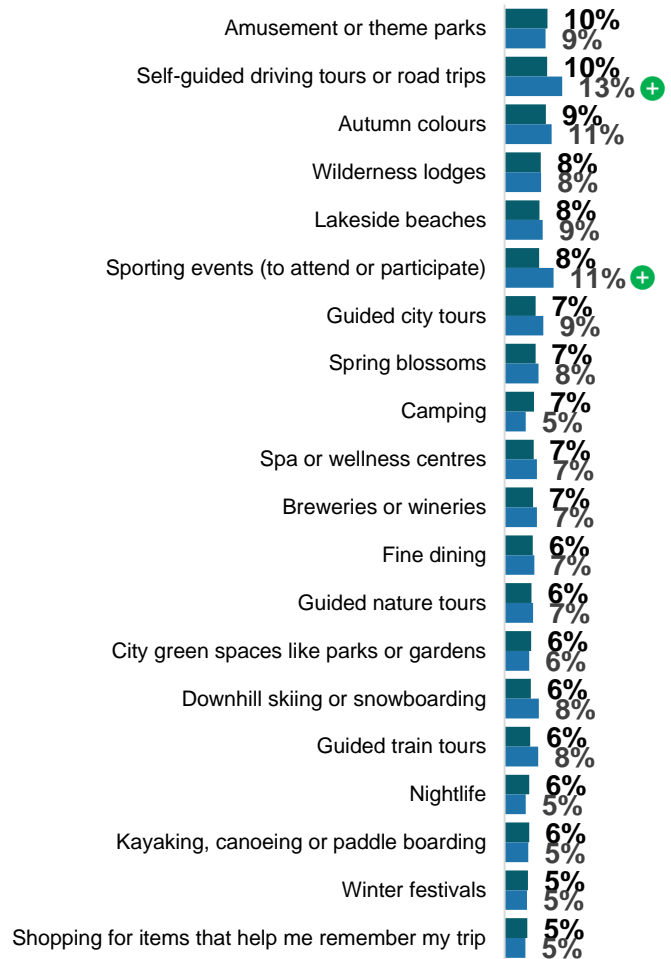
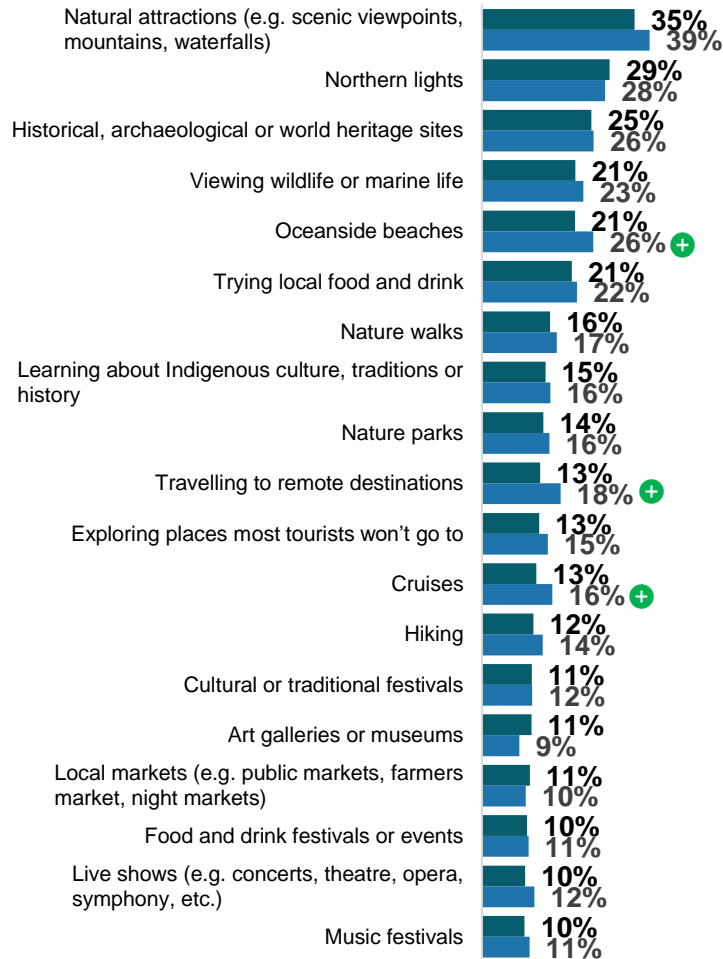
General Activities Interested In

■ Total United Kingdom ■ HVG Audience

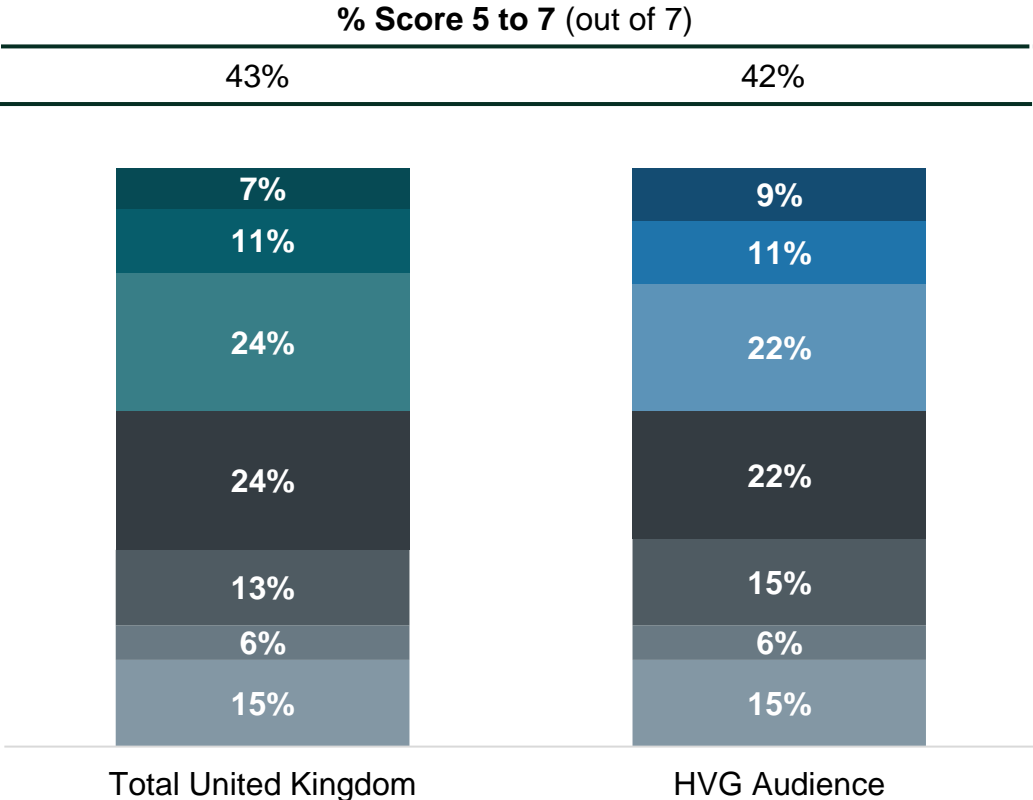


Trip Anchor Activities

■ Total United Kingdom ■ HVG Audience



Priority of Sustainable Travel When Planning a Trip

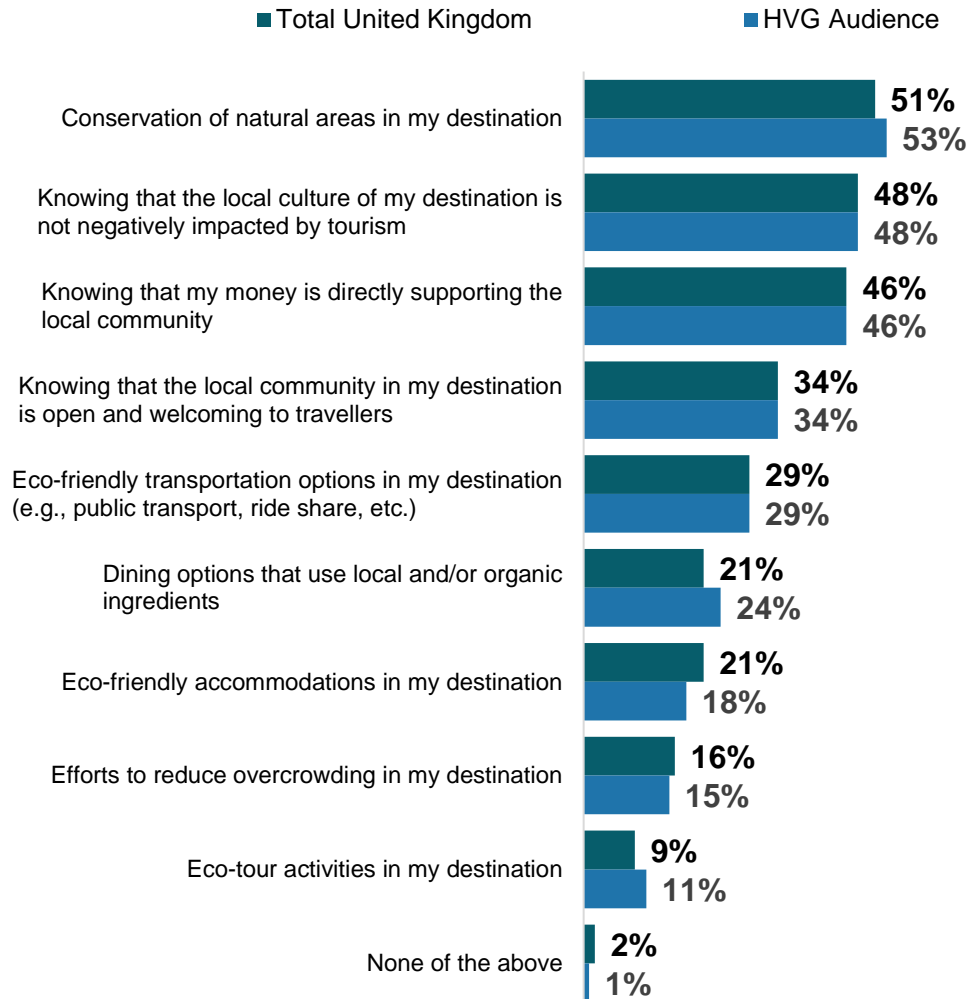


Sustainable Travel Description

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”.

47 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'.

Top 3 Most Important Sustainability Efforts

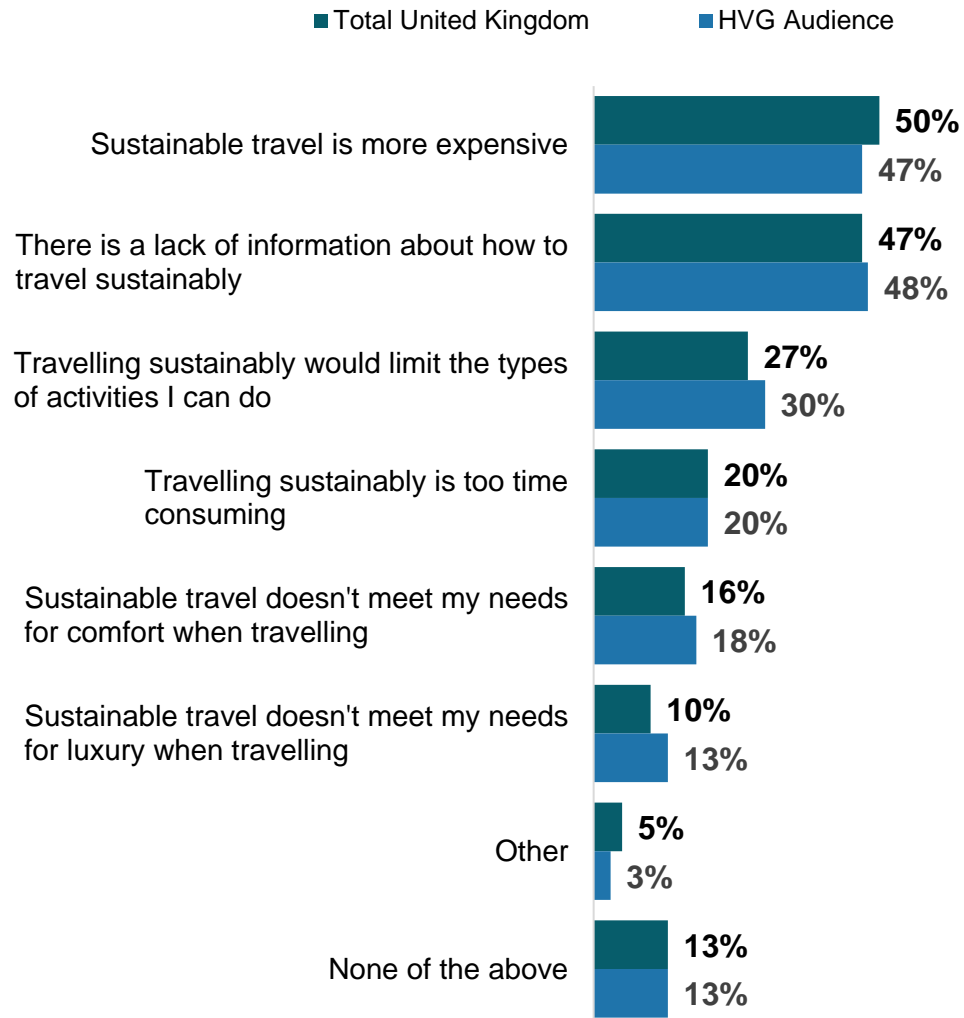


Sustainable Travel Description

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”.



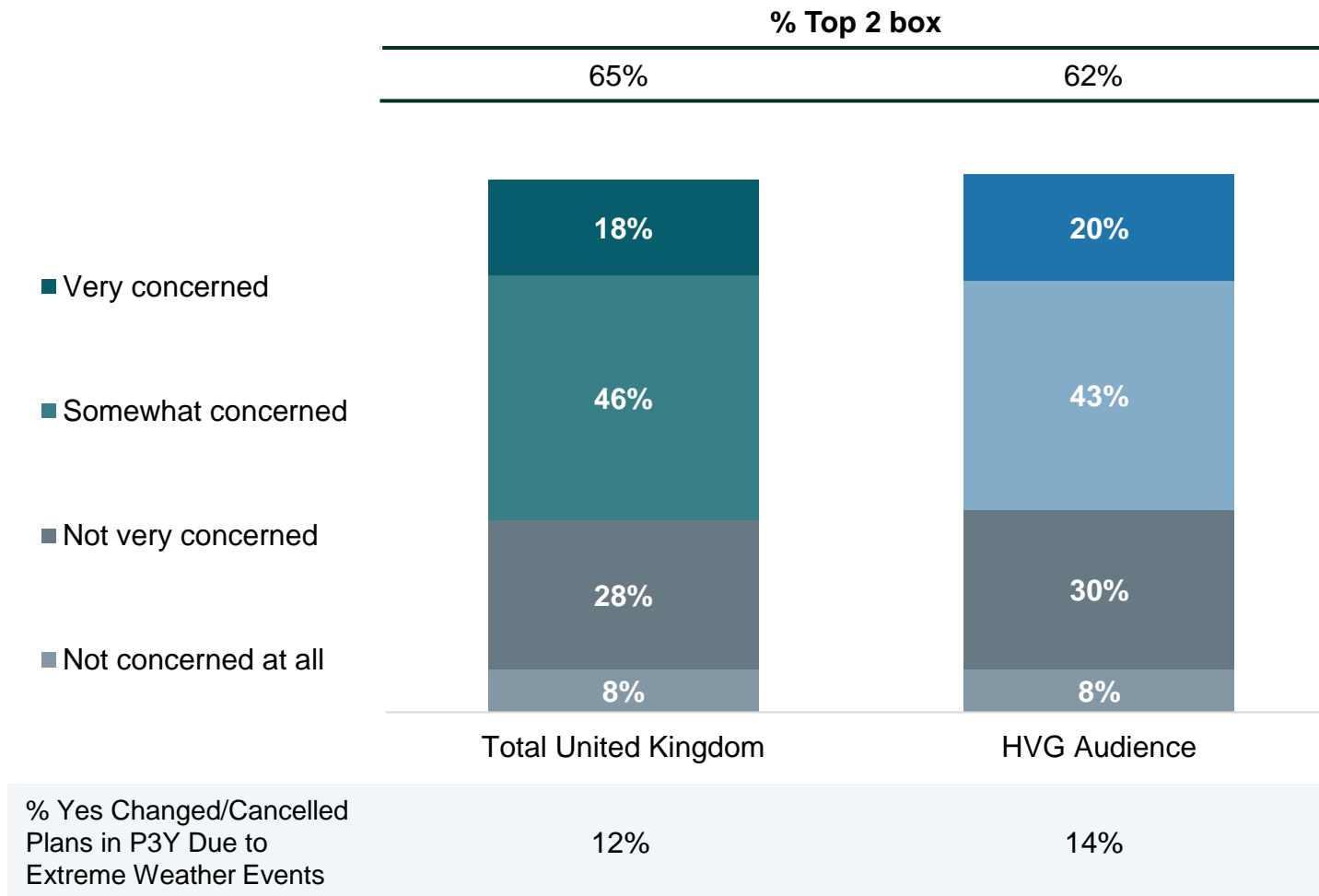
Barriers to Sustainable Travel



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”.

Impact of Extreme Weather Events on Travel Plans

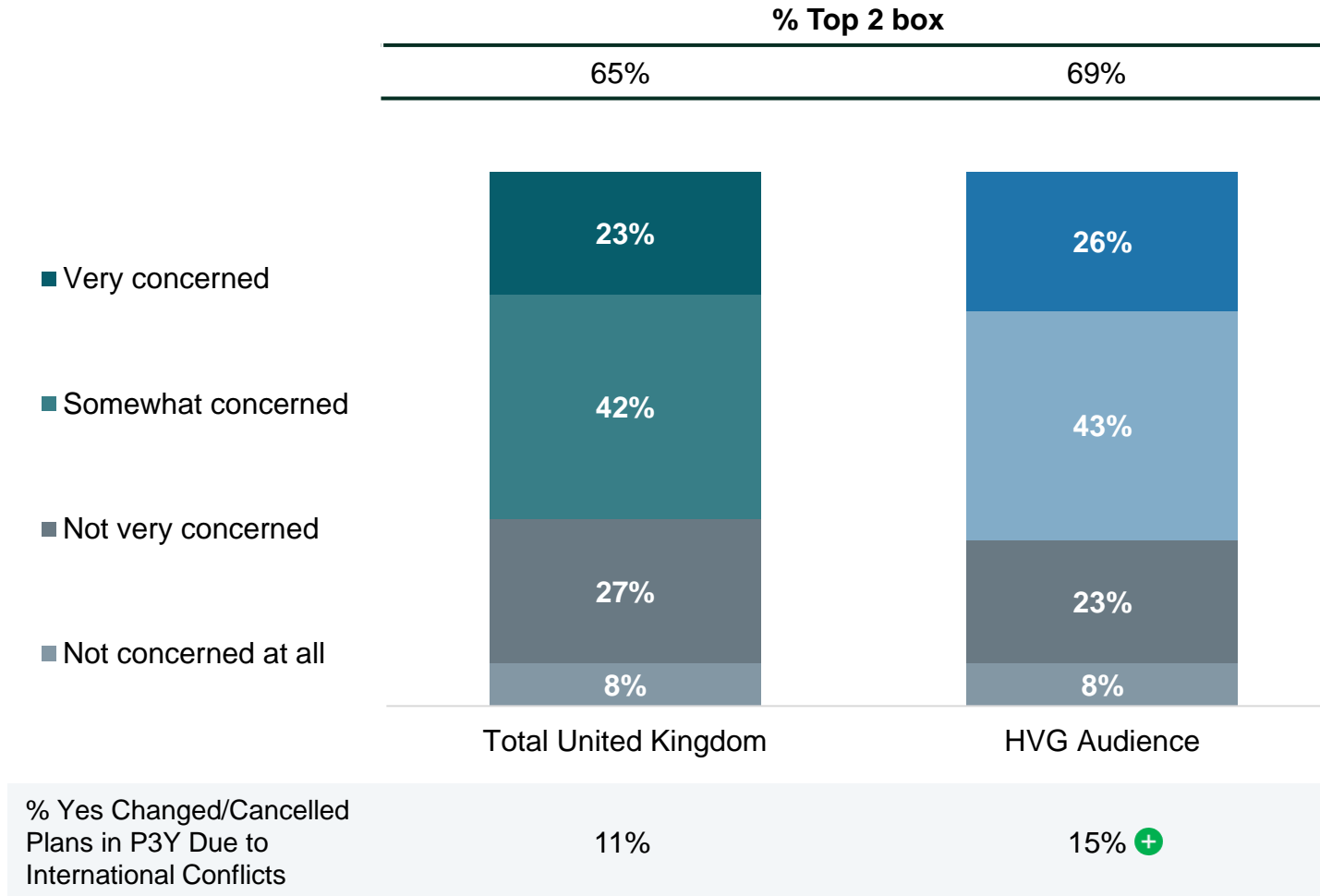


Extreme Weather Events Description

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.

50 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?

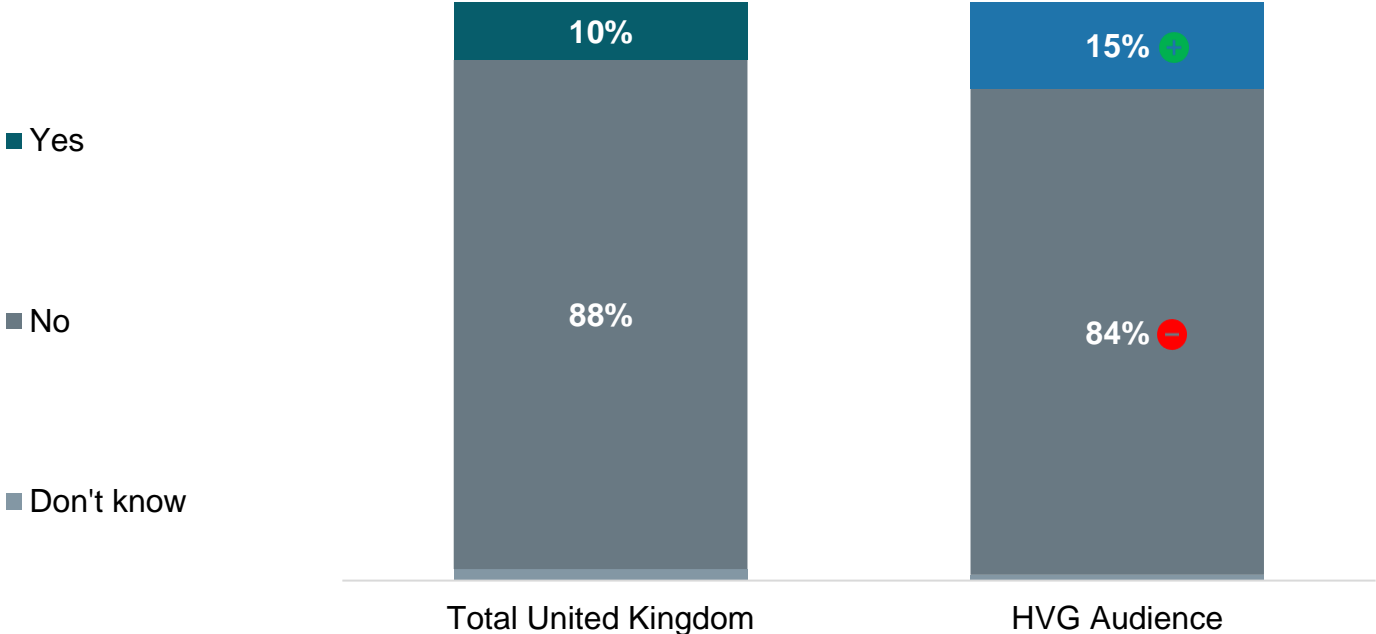
Impact of International Conflicts & Unrest on Travel Plans



International Conflicts Description

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

Usage of AI Tools to Plan Trips





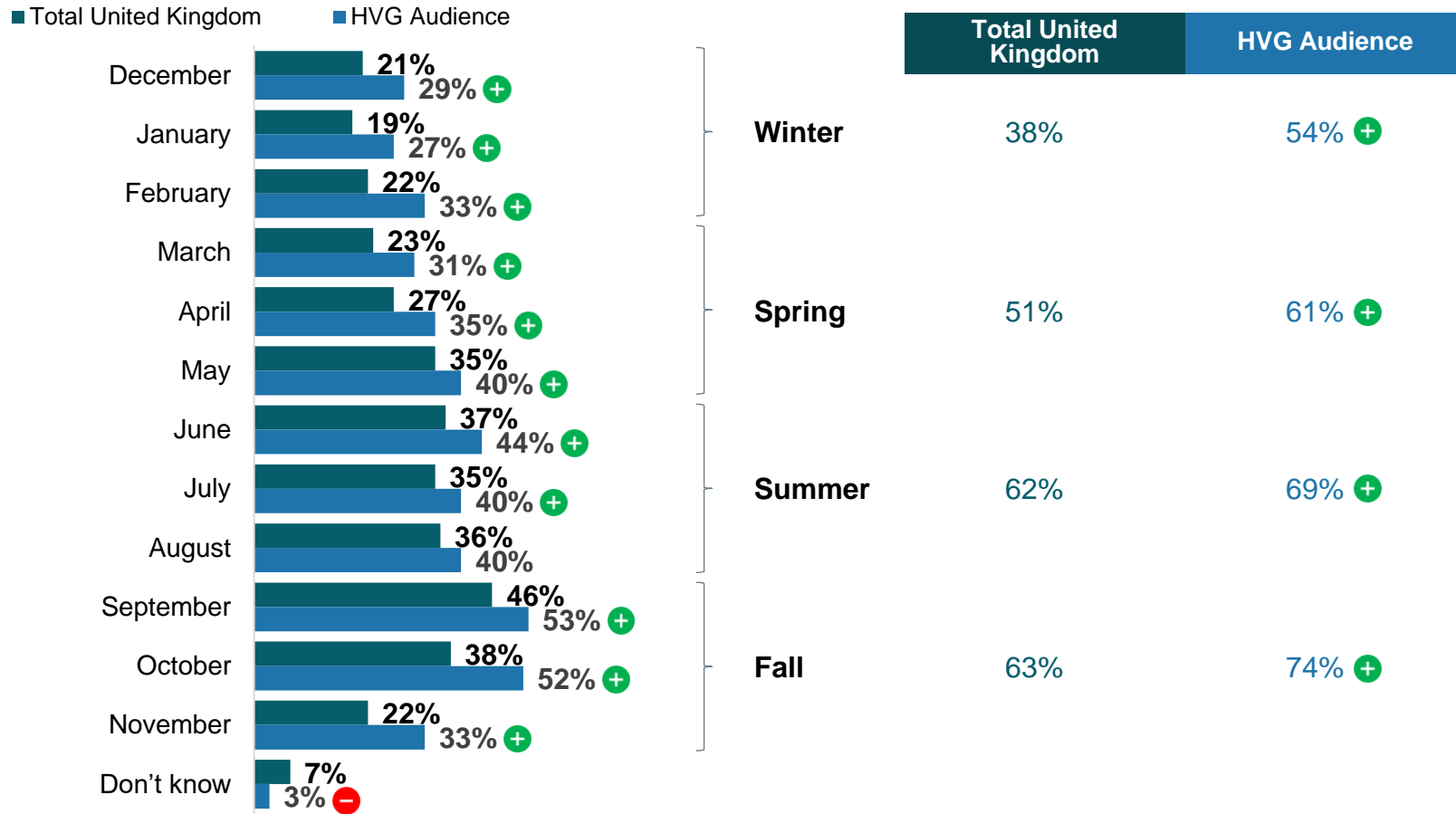
Seasonal Travel



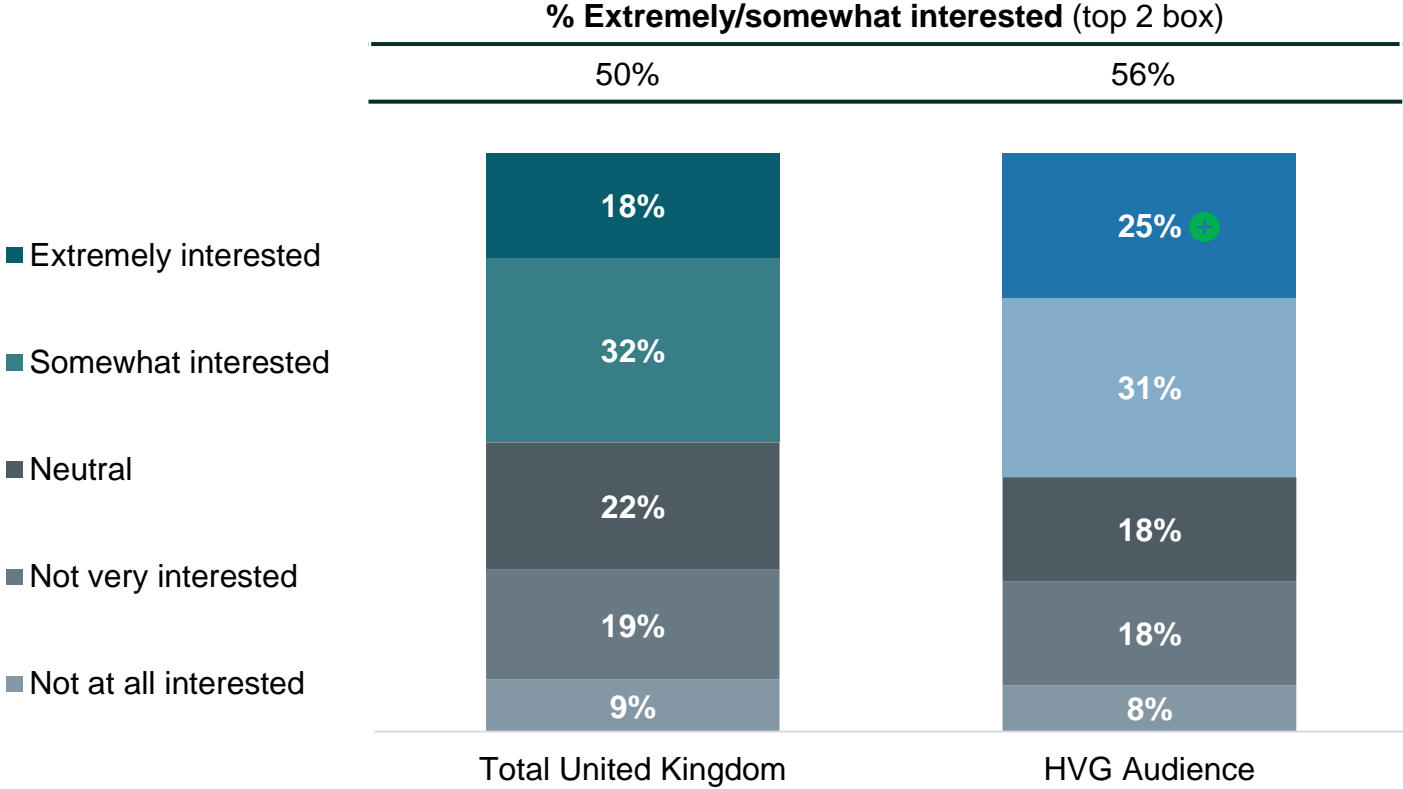
Yellowknife
Northwest Territories



Preferred Time of Year for Holiday Trips



Interest in Winter Holidays

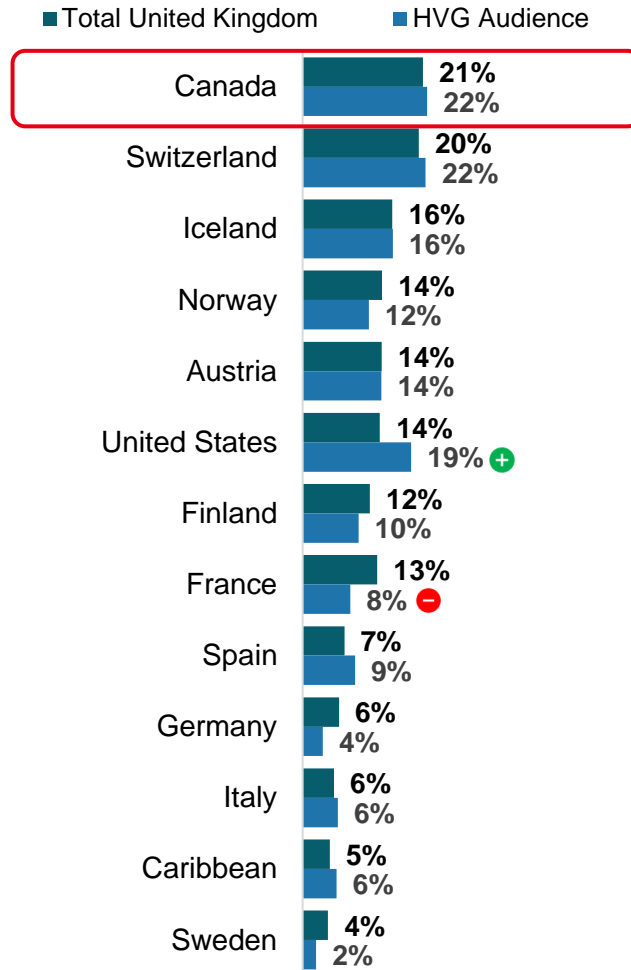


Winter Season Description

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.

55 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) (n=736); HVG (n=165)
 D2. In general, how interested are you in taking a holiday trip to a destination during its winter season?

Unaided Winter Destinations



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.

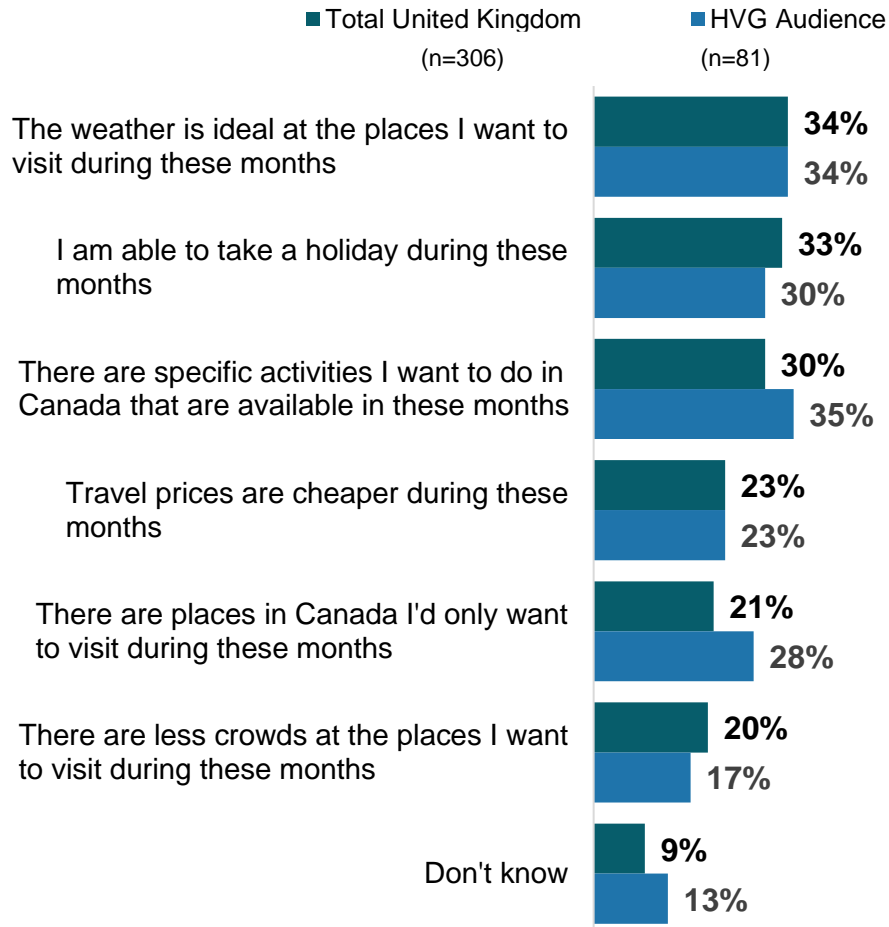
Note: respondents were asked either about winter travel (B2/D2) or fall travel (B3/D3)
 Base: Long-haul holiday travellers (past 3 years or next 2 years) (n=736); HVG (n=165)

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.

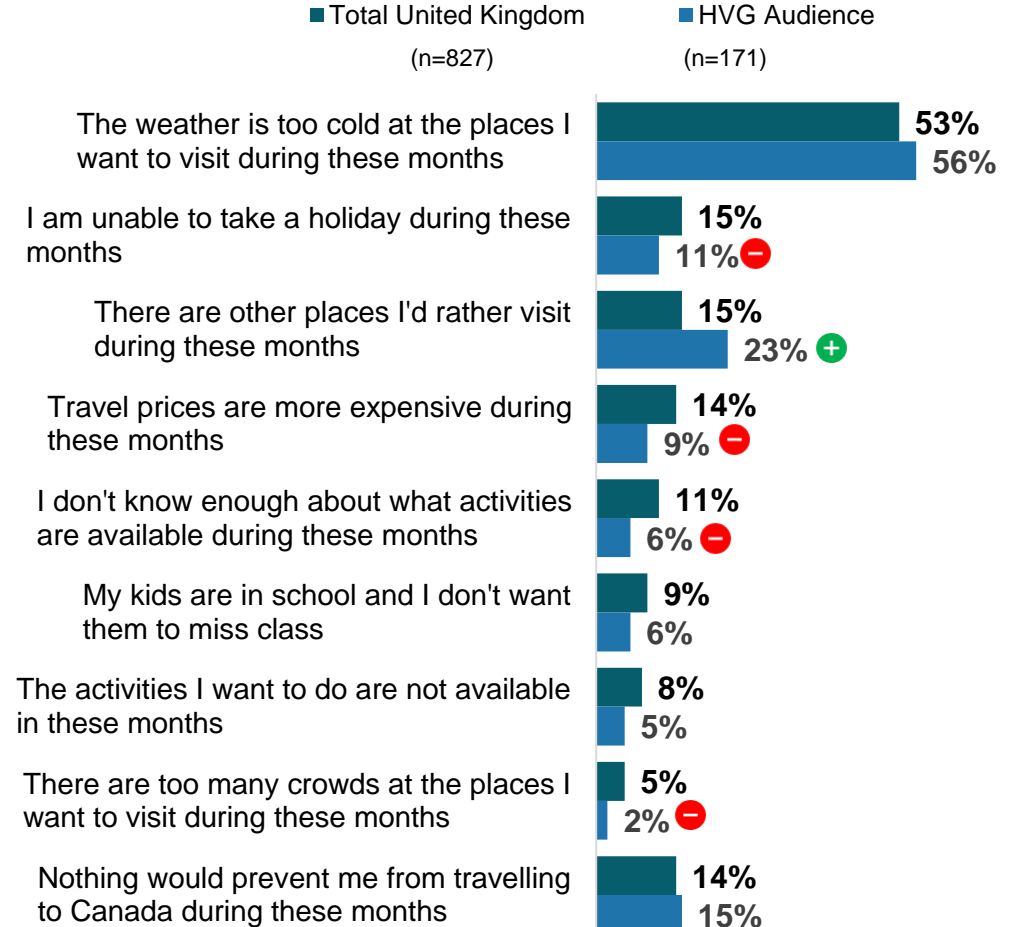
Motivators & Barriers for Winter Travel to Canada



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**?

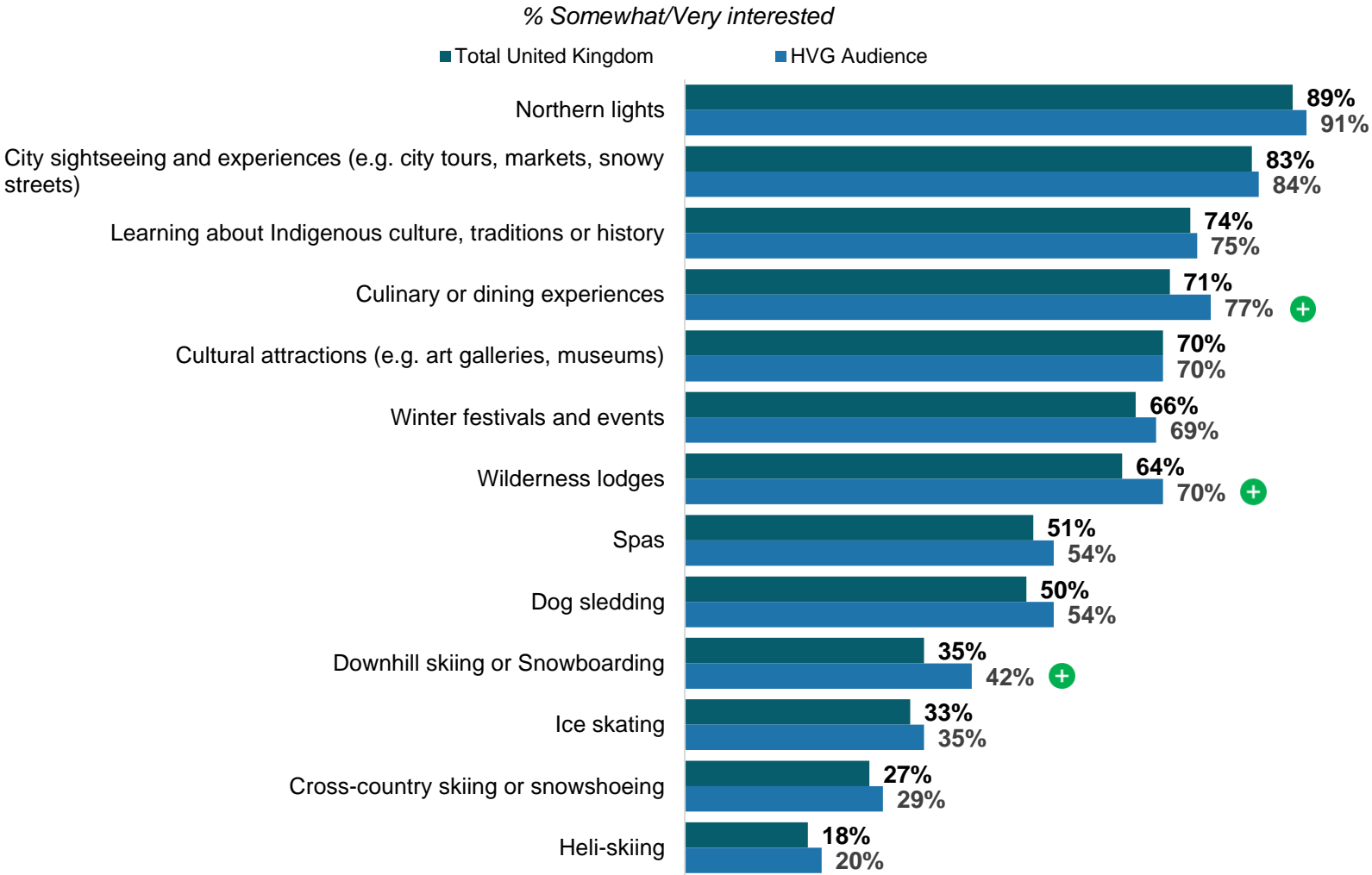
Base: Those in the dream to purchase stages of the path to purchase for Canada and not considering visiting Canada or any province/territory in December, January or February E9. You indicated earlier that you are not considering taking a holiday to **Canada** during the months of December, January and/or 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)

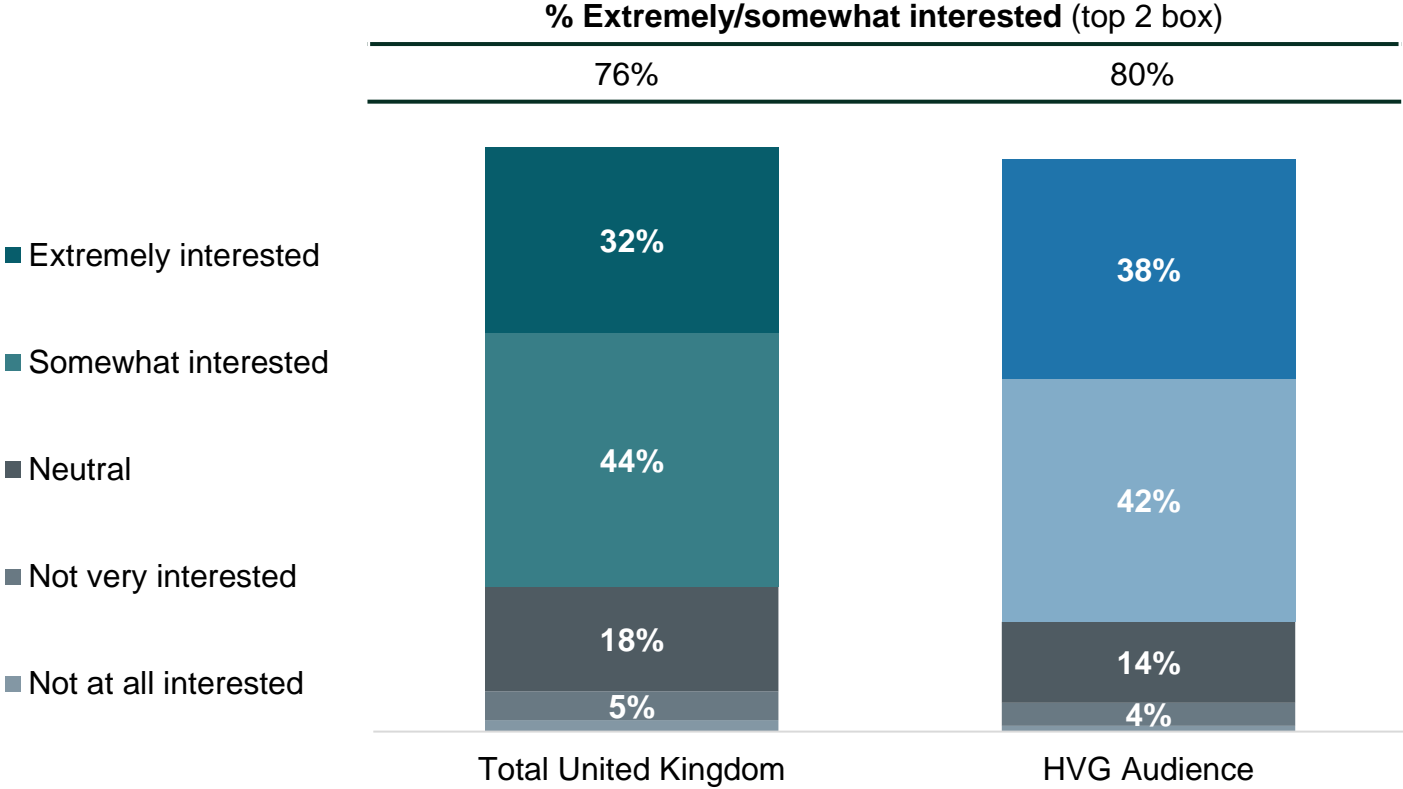
United Kingdom GTRP – December 2023



Interest in Winter Activities in Canada



Interest in Fall Holidays

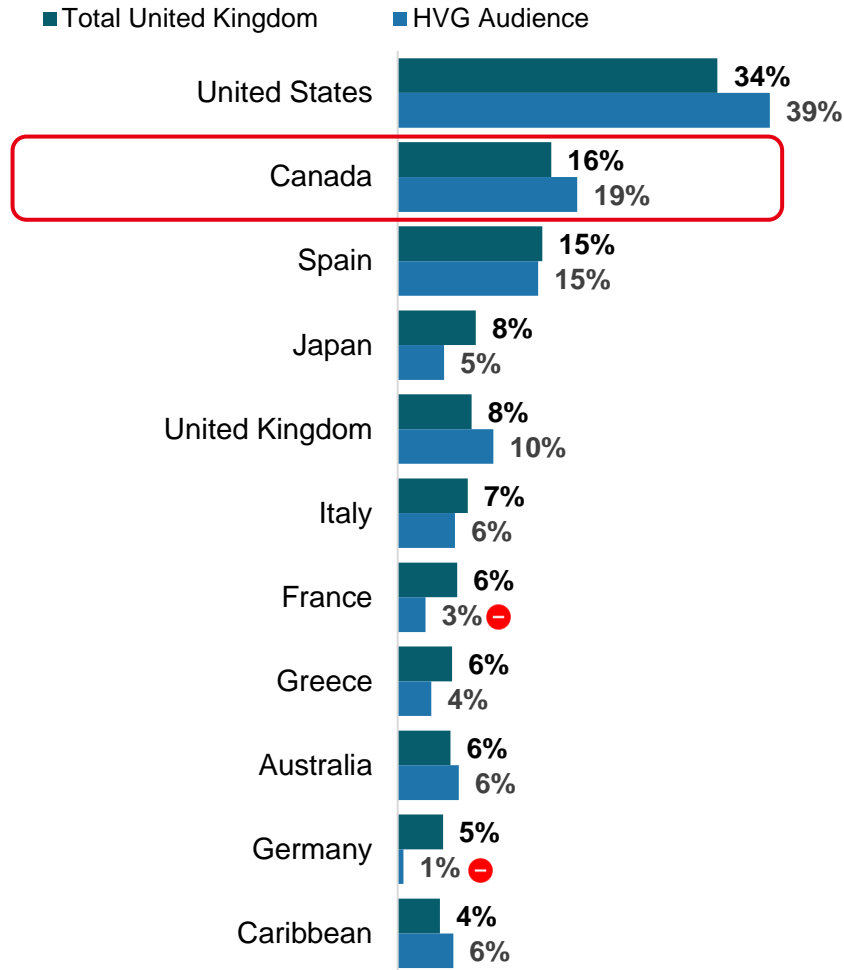


Autumn Season Description

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.

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

Unaided Fall Destinations



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.

Note: respondents were asked either about winter travel (B2/D2) or autumn/fall travel (B3/D3)
 Base: Long-haul holiday travellers (past 3 years or next 2 years) (n=796); HVG (n=168)

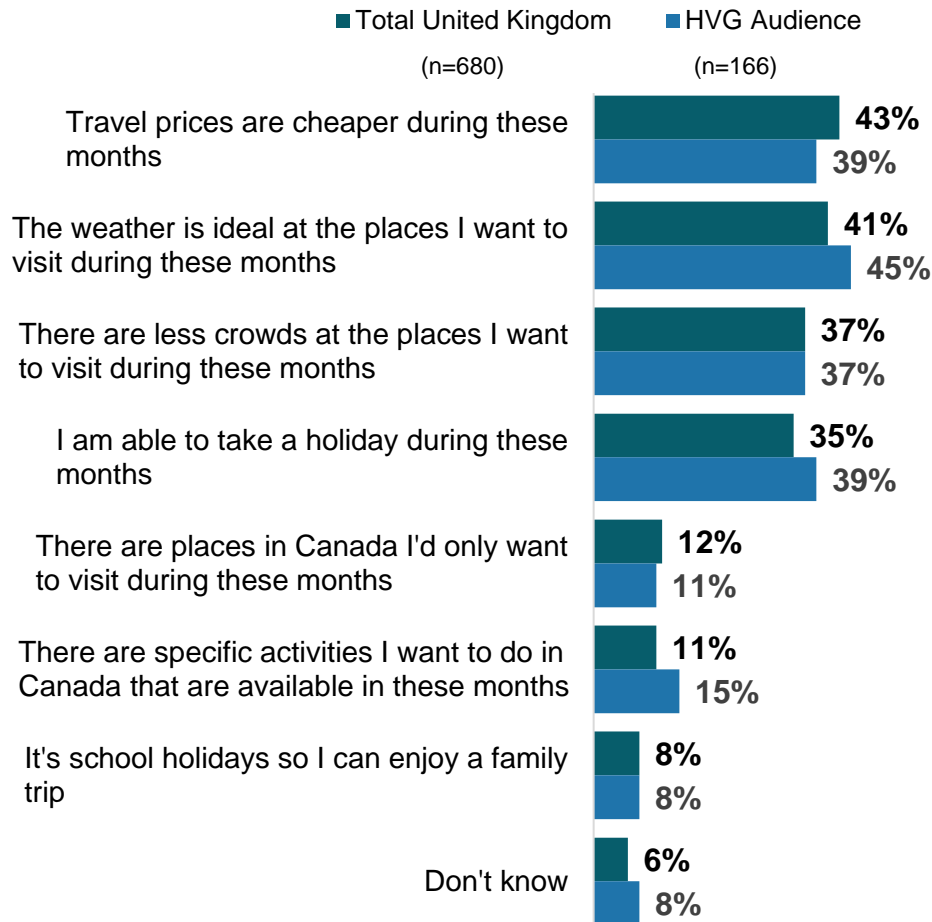
B3. What destinations come to mind when thinking about travel to experience the **autumn season**? (Please list up to 3 destinations. You can mention destinations within or outside of Europe, North Africa and the Mediterranean.) [DESCRIPTION] Please note: You do not have to limit your responses to destinations you are considering for a holiday trip.



Motivators & Barriers for Fall Travel to Canada



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**?

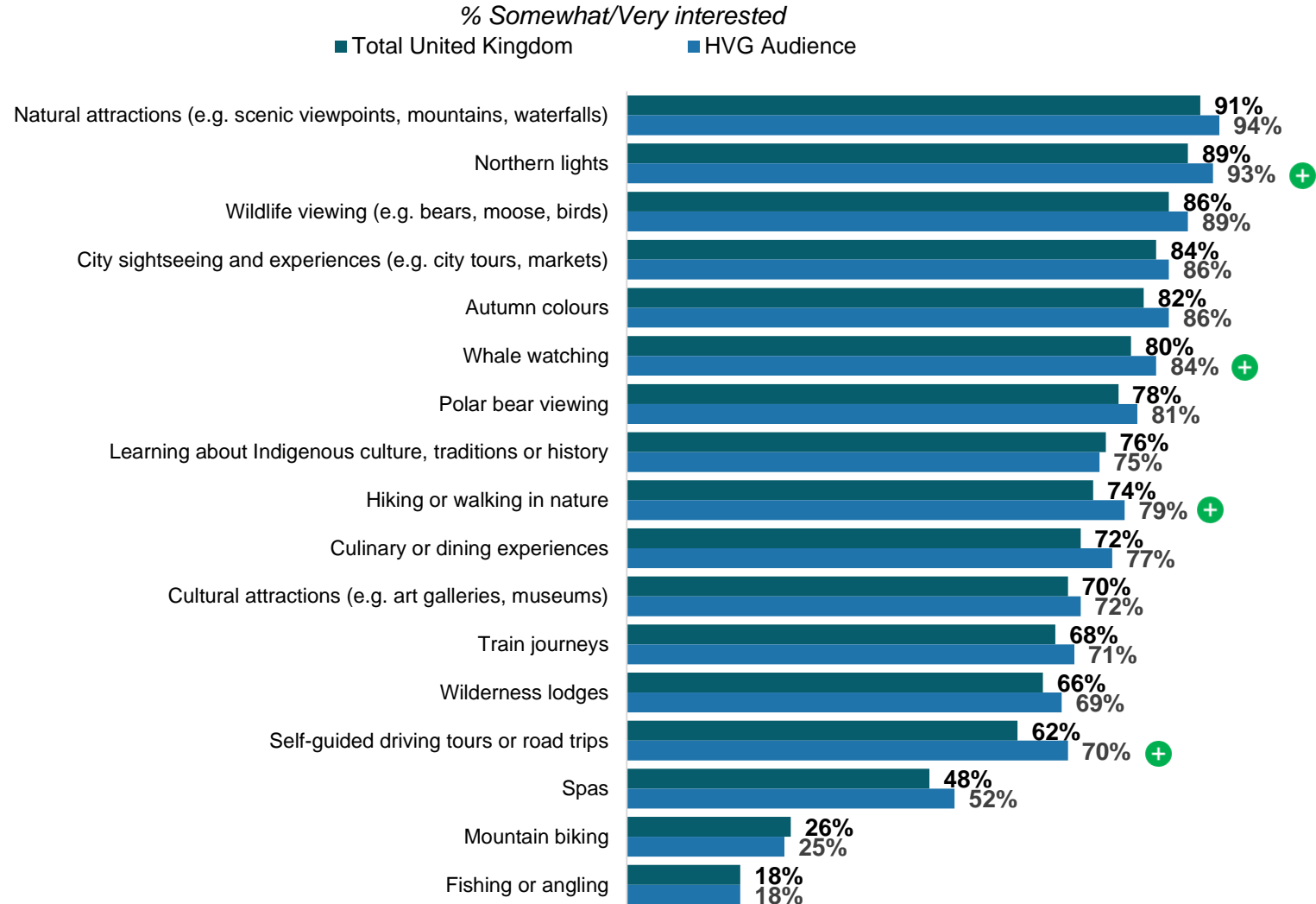
Base: Those in the dream to purchase stages of the path to purchase for Canada and not considering visiting Canada or any province/territory in September, October or November E7. You indicated earlier that you are not considering taking a holiday to **Canada** during the months of September, October 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**?

United Kingdom GTRP – December 2023



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

Interest in Fall Activities in Canada

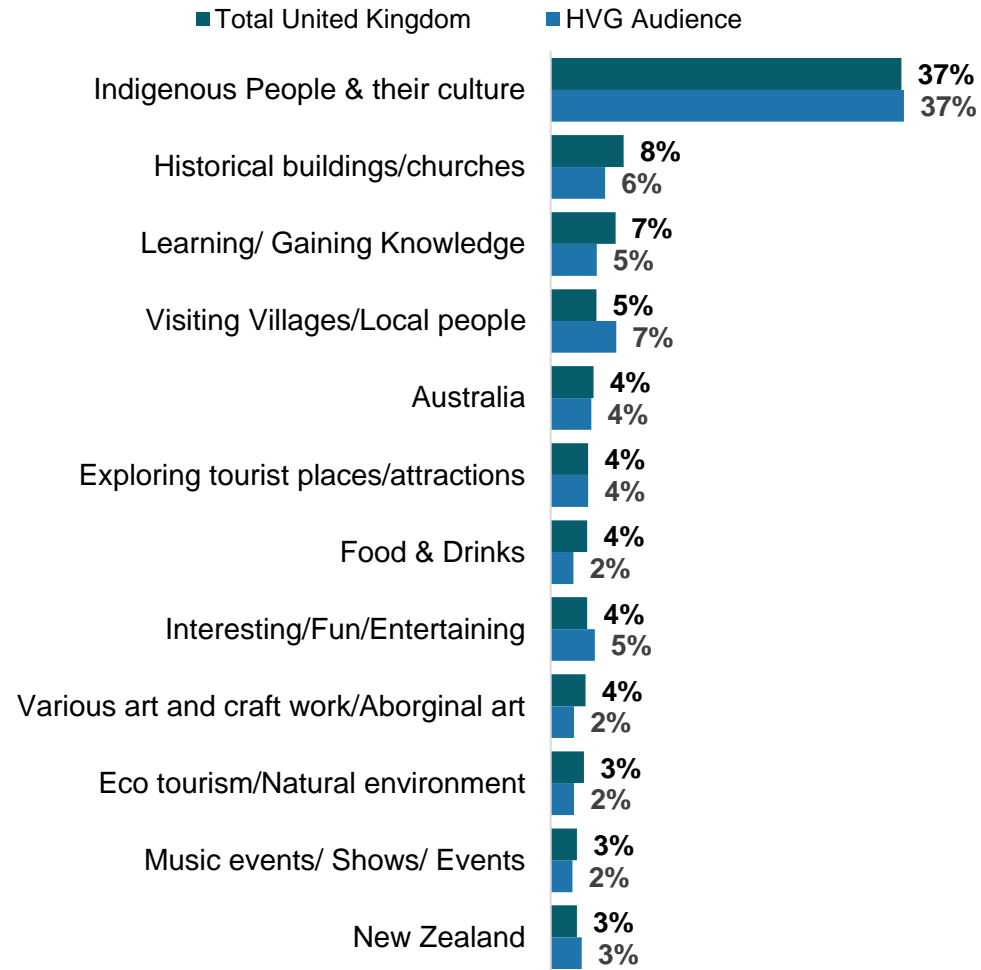




Indigenous Tourism



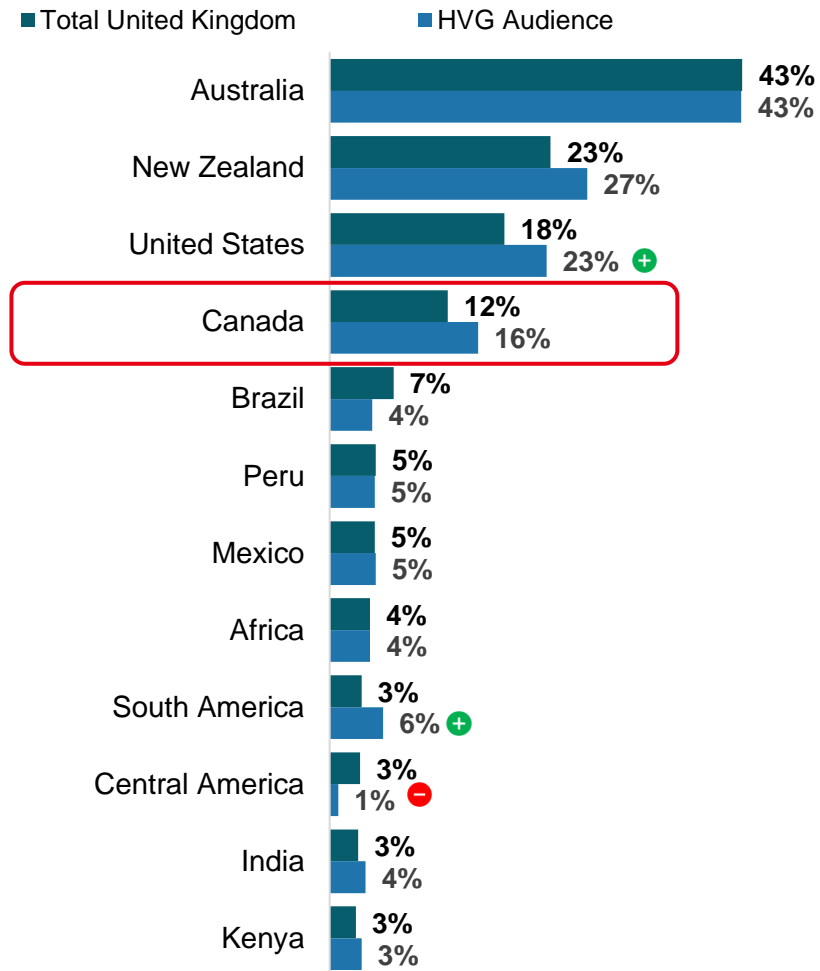
Unaided Mentions – Indigenous Cultural & Tourism Activities



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.

Unaided Indigenous Tourism Destinations

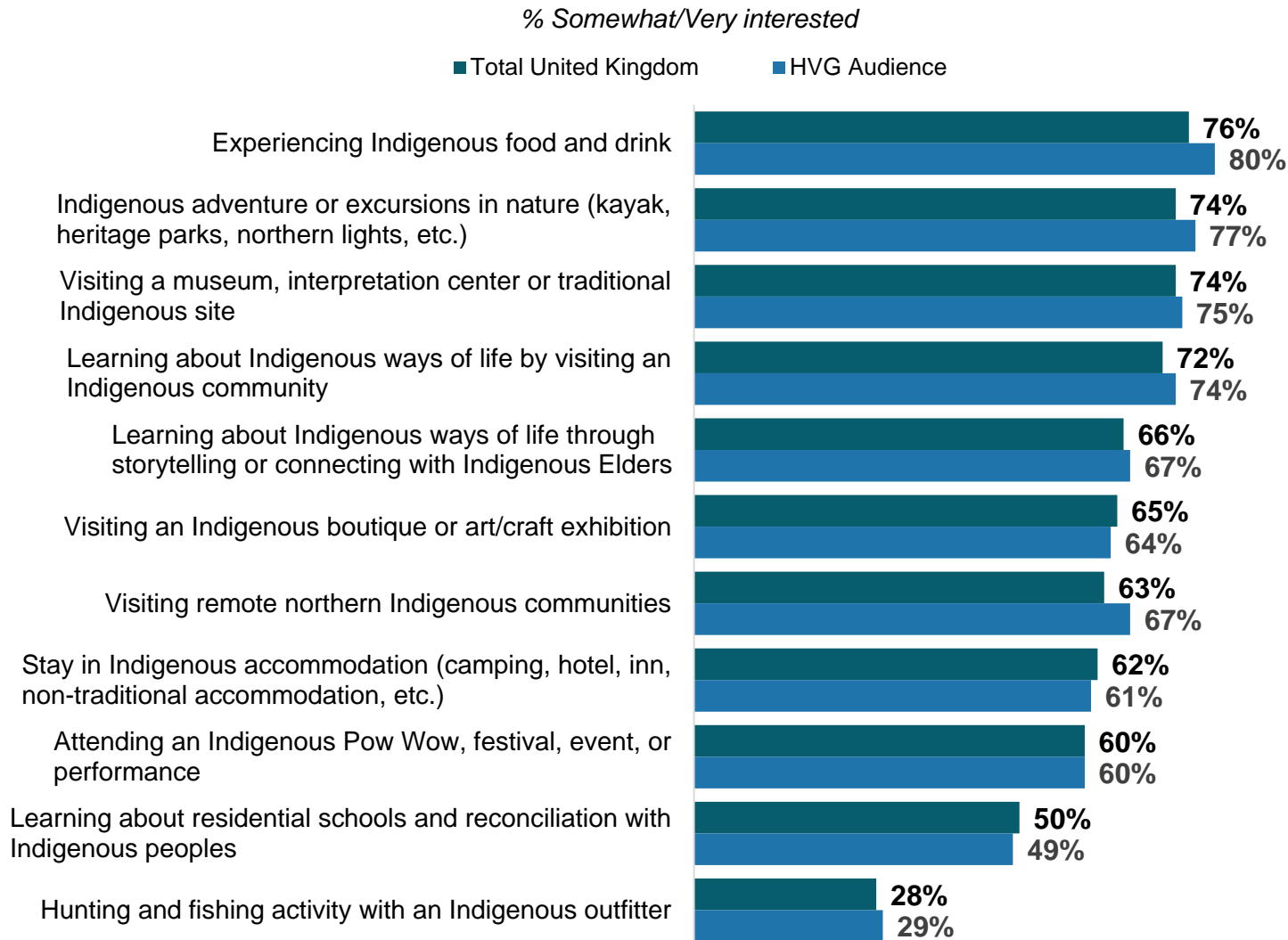


Indigenous Peoples Description

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.

65 Base: Long-haul holiday travellers (past 3 years or next 2 years) (n=1532); HVG (n=333)
 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.

Interest in Indigenous Cultural & Tourism Activities



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.



Most Recent Trip



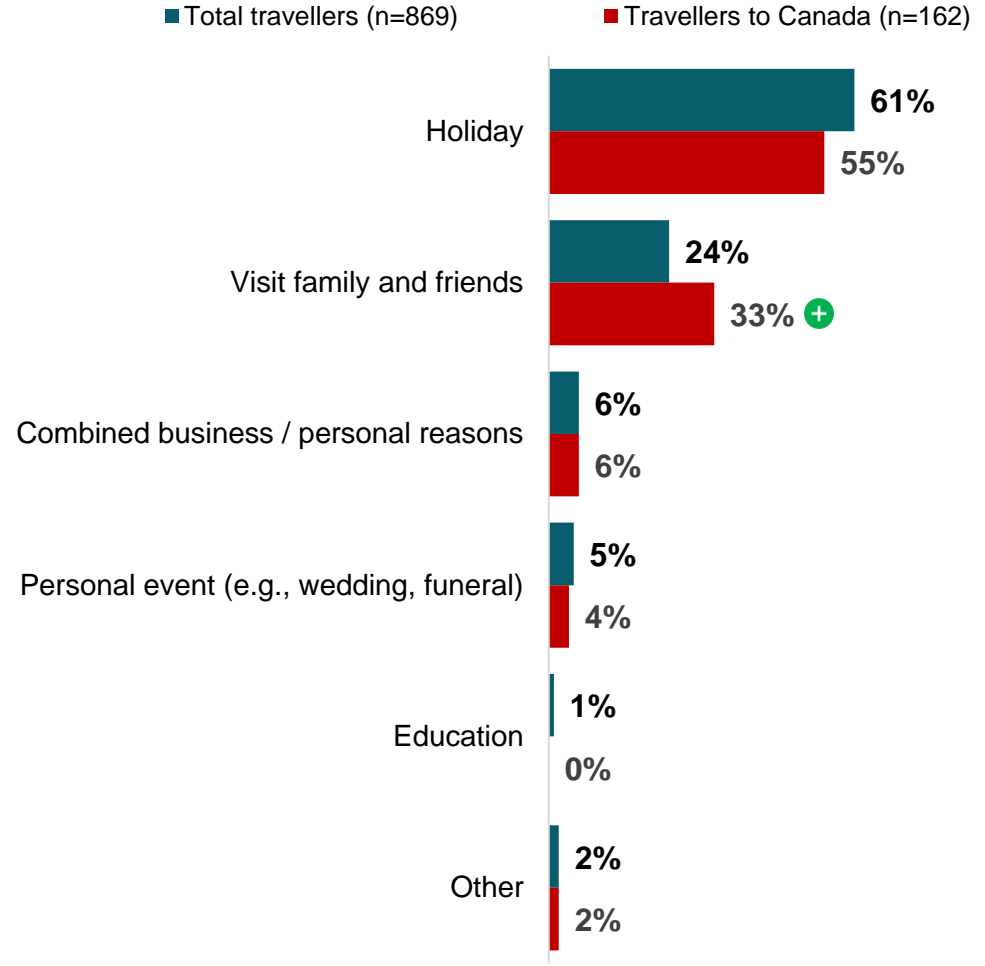
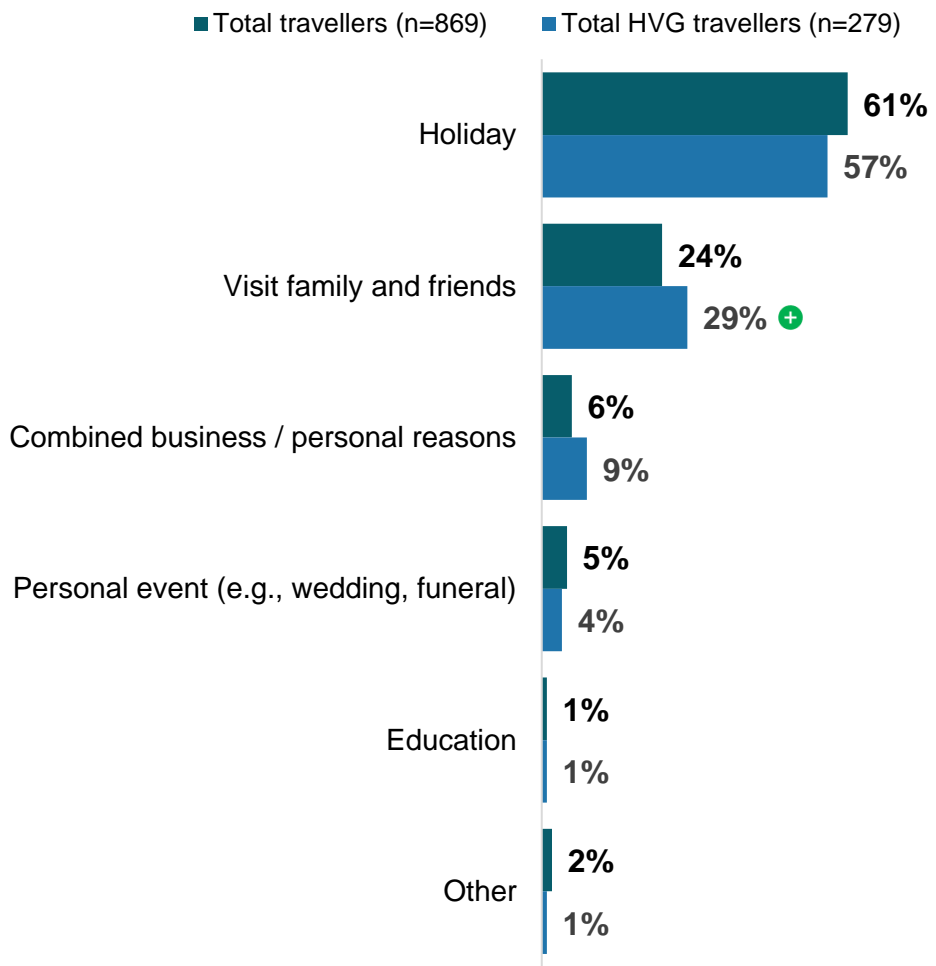
Lake Louise
Alberta



Main Purpose of Recent Trip

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

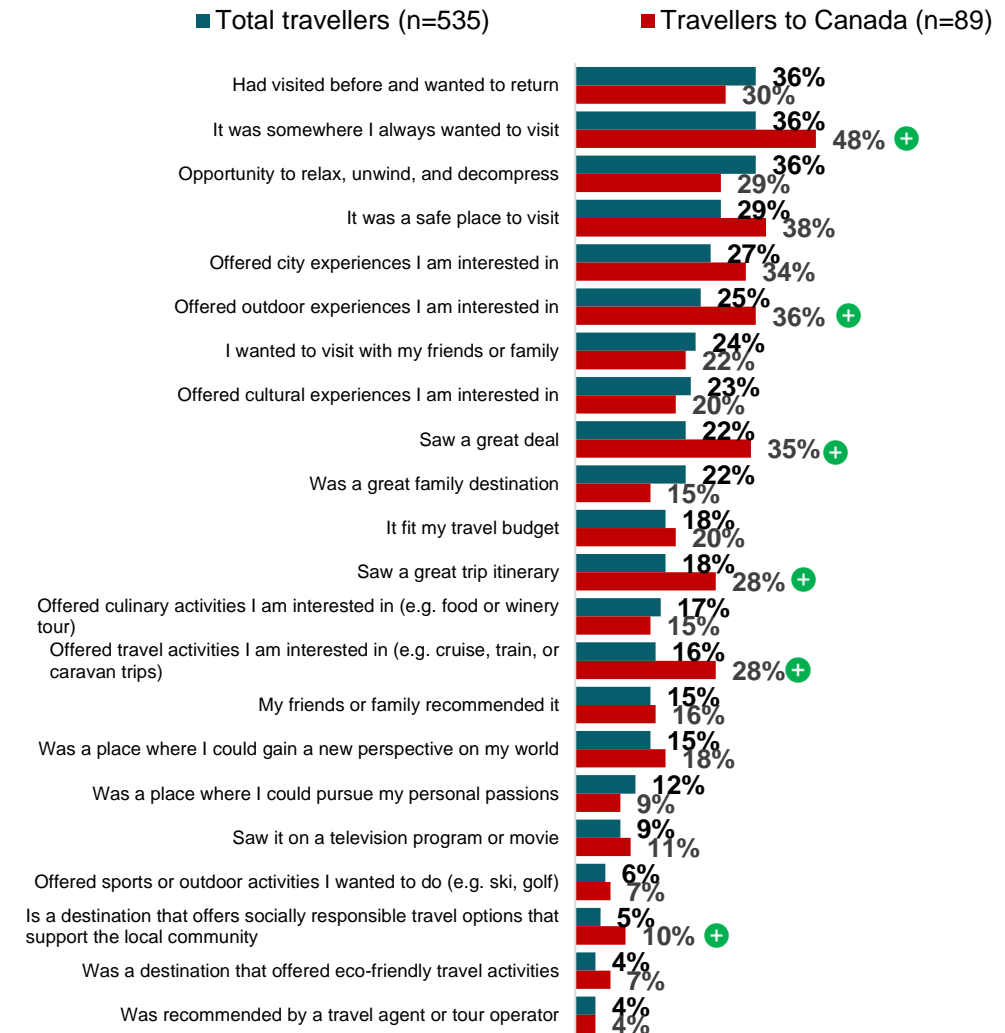
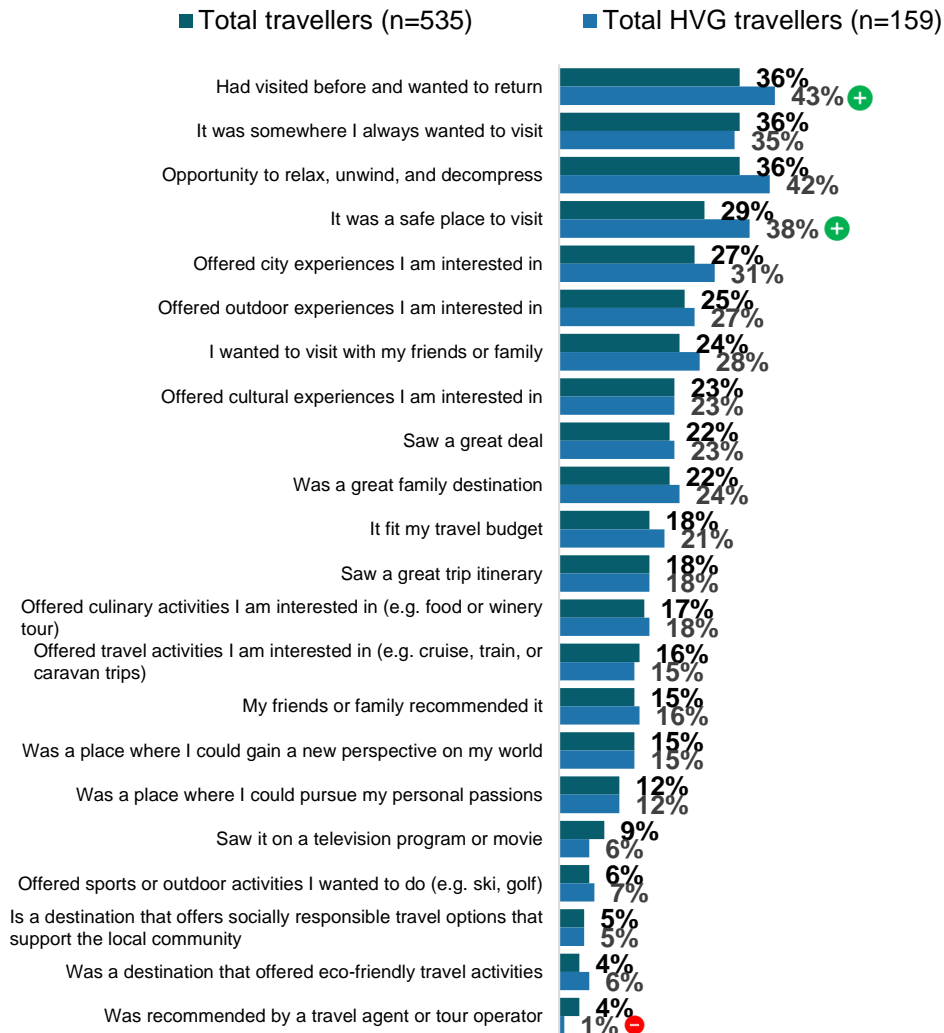
Total Travellers to Any Destination vs. Total Travellers to Canada



Factors in Choosing Destination for Recent Trip

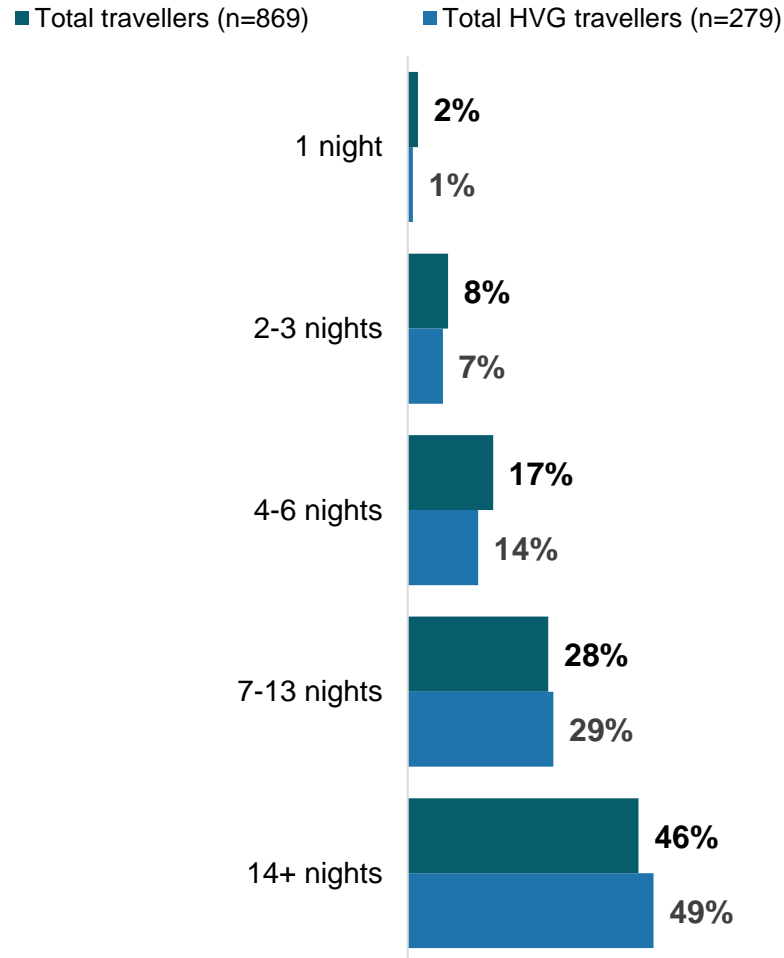
Total Travellers to Any Destination vs. HVG Travellers to Any Destination

Total Travellers to Any Destination vs. Total Travellers to Canada

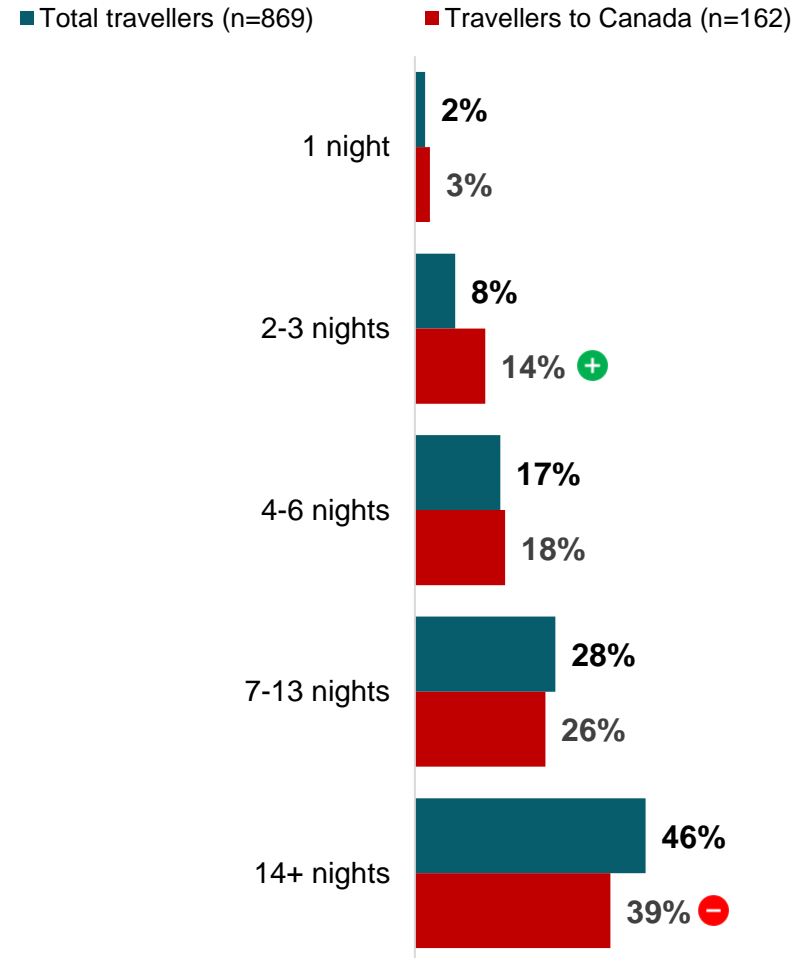


Nights Spent During Recent Trip

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

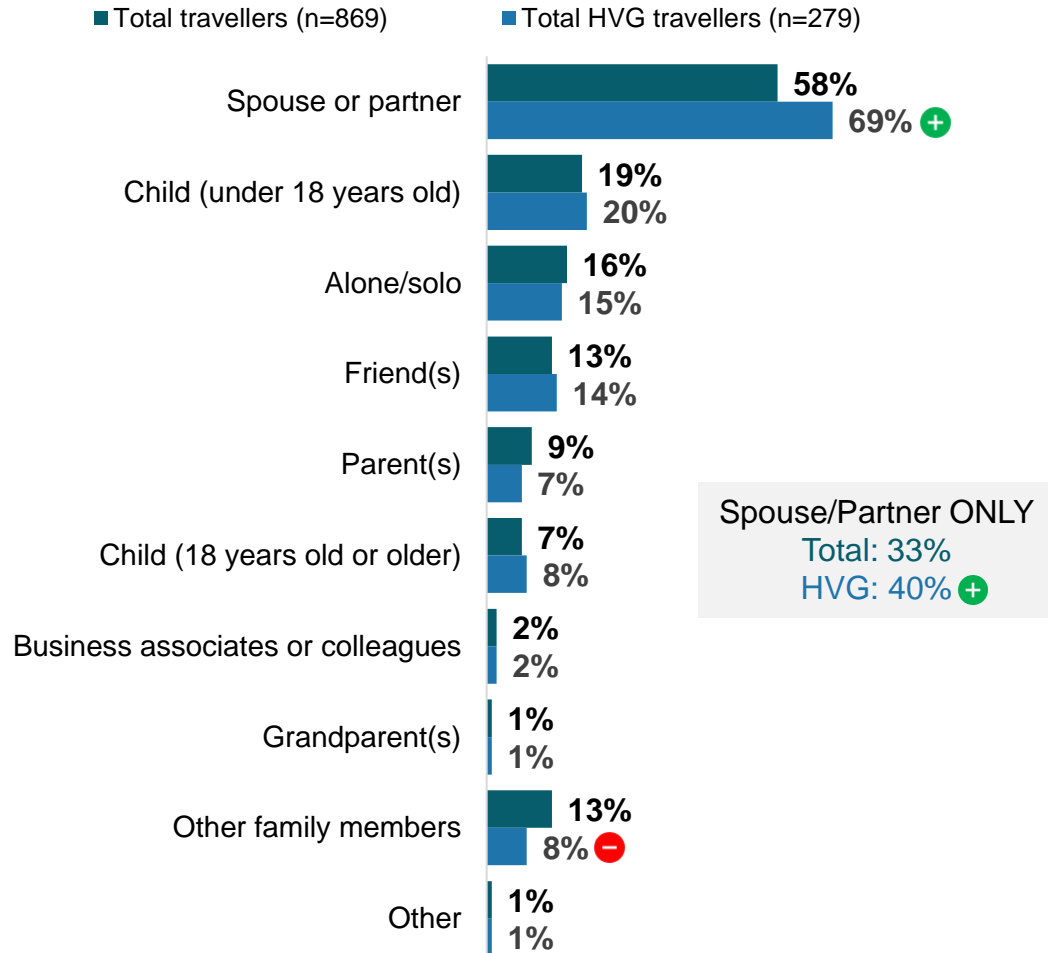


Total Travellers to Any Destination vs. Total Travellers to Canada

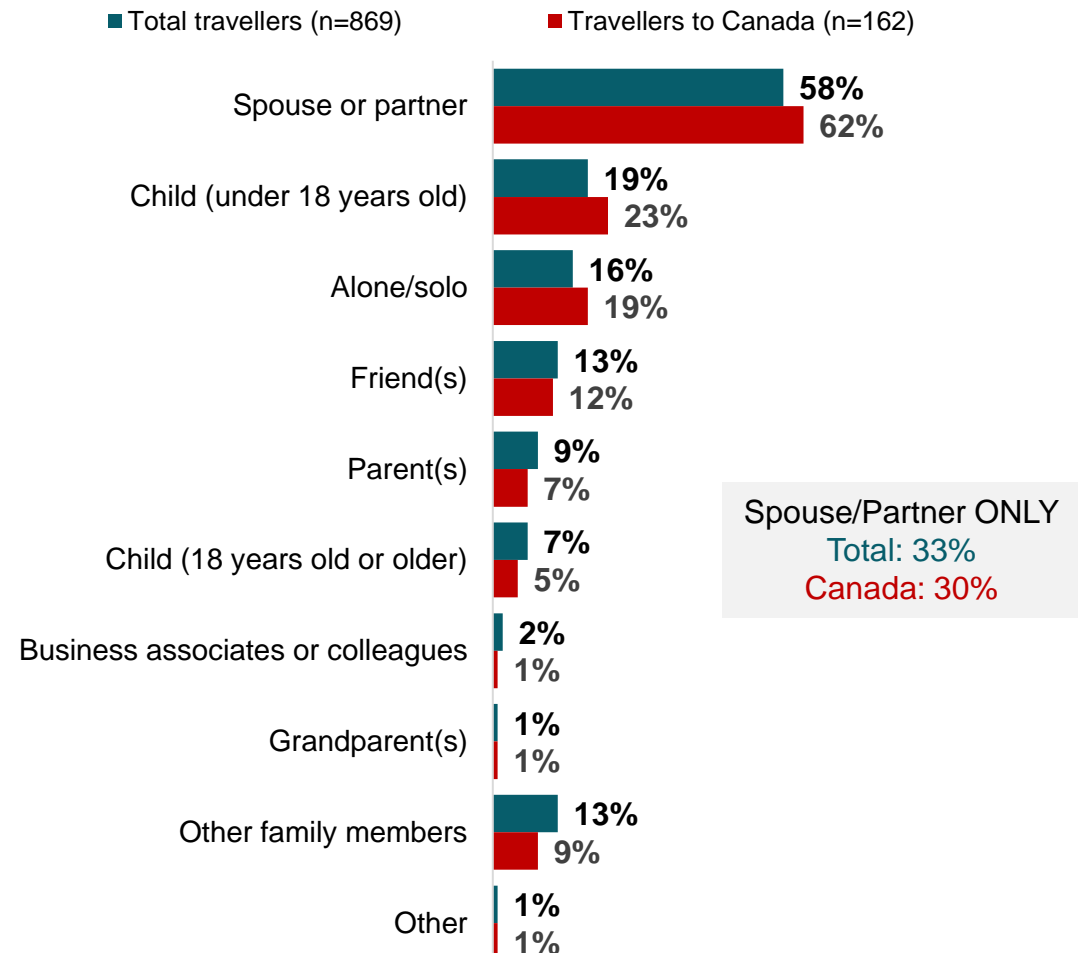


Travel Party of Recent Trip

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

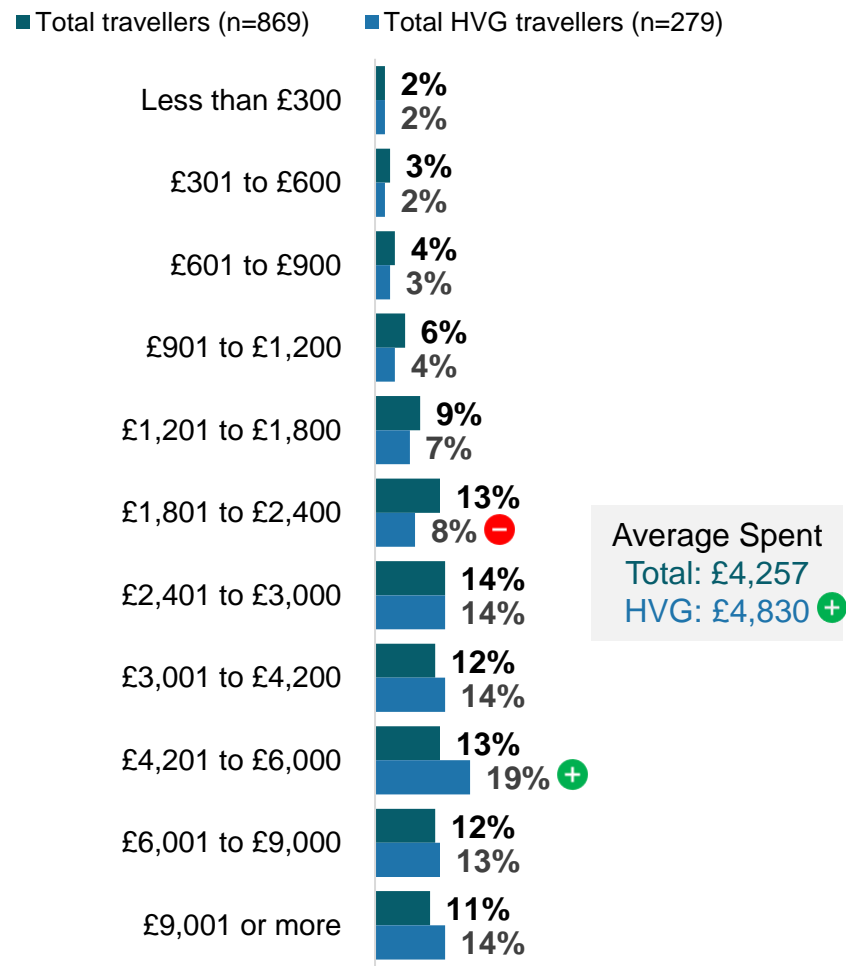


Total Travellers to Any Destination vs. Total Travellers to Canada

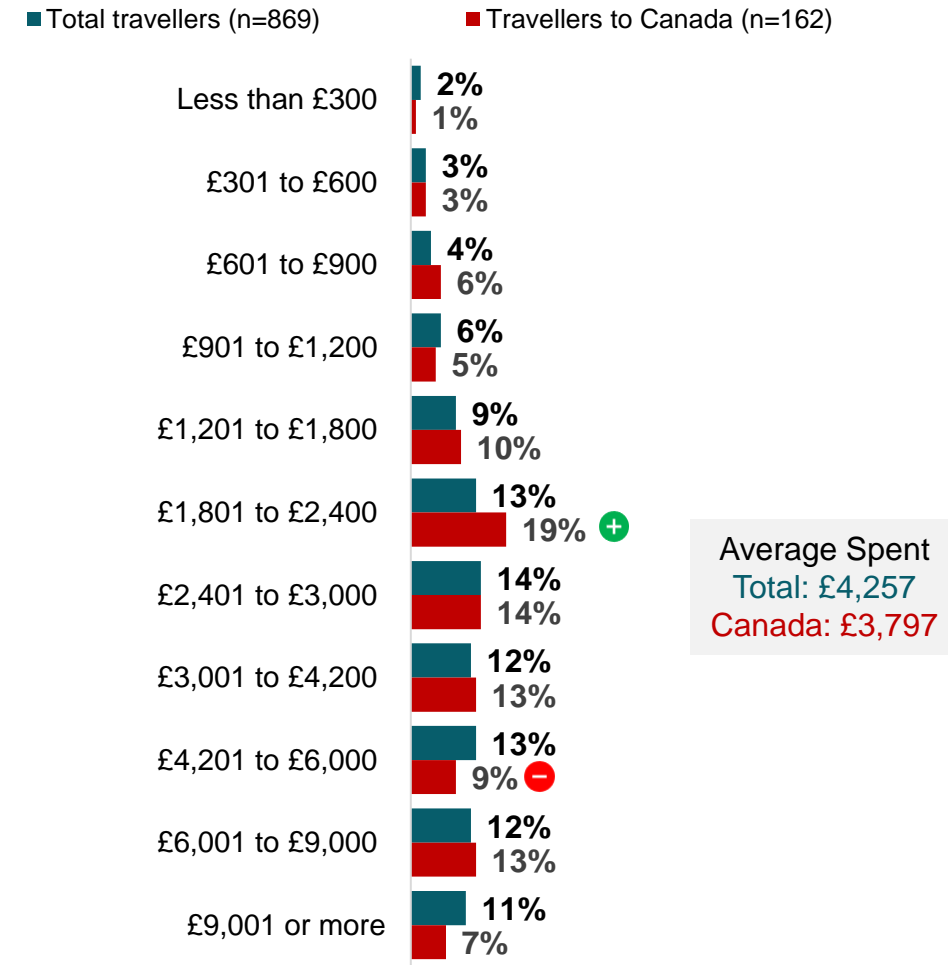


Amount Spent for Recent Trip

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

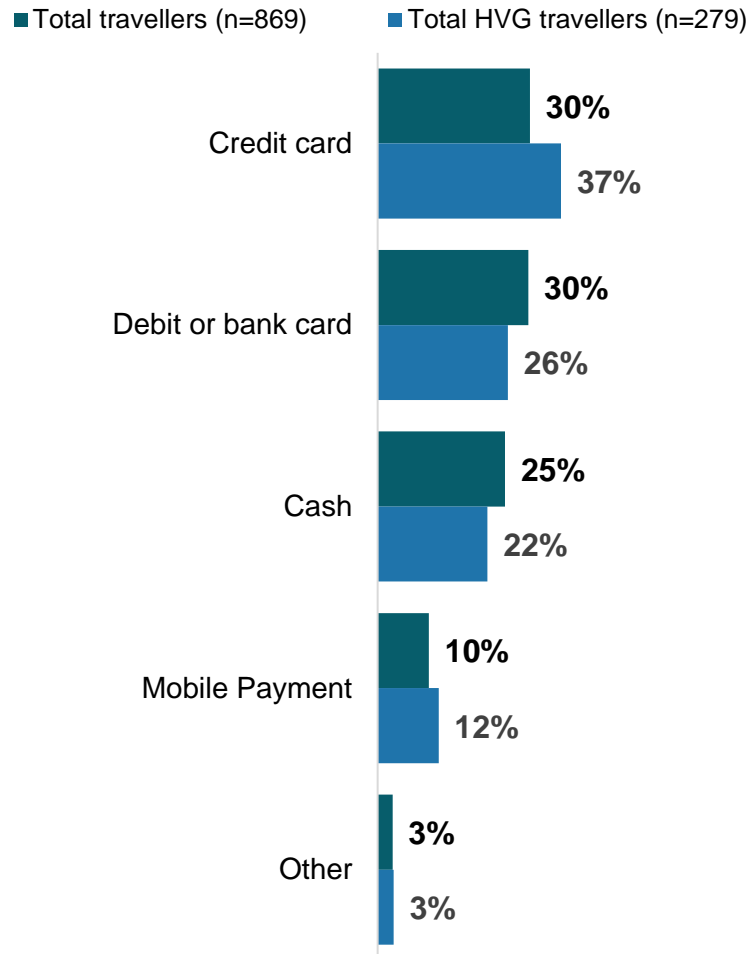


Total Travellers to Any Destination vs. Total Travellers to Canada

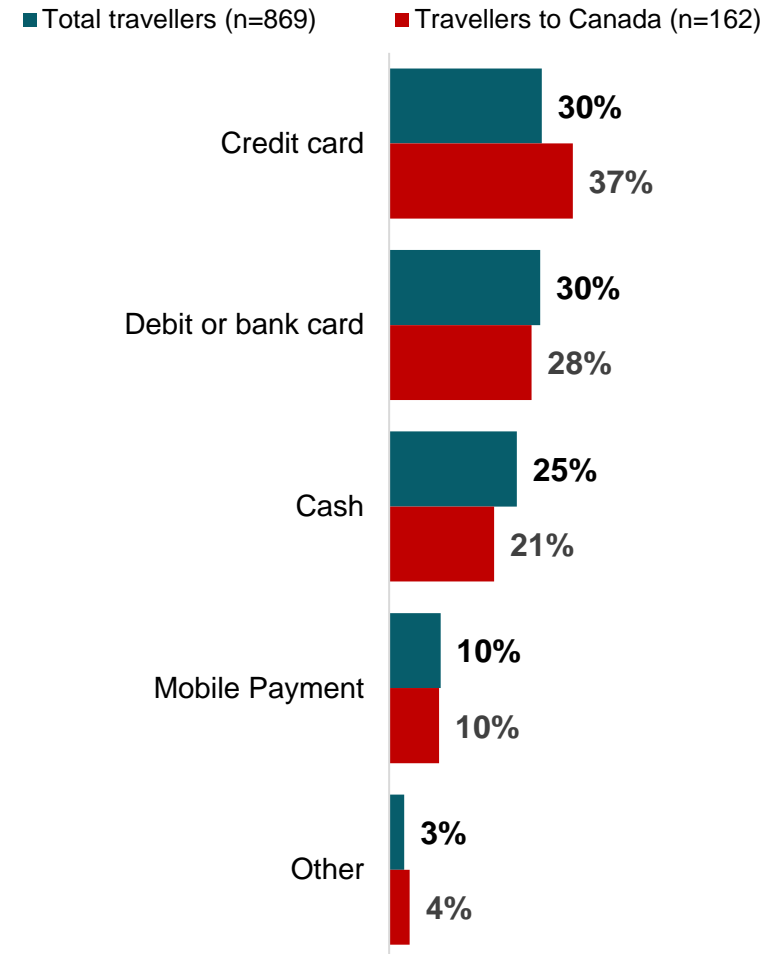


Payment Methods for Recent Trip

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



Total Travellers to Any Destination vs. Total Travellers to Canada

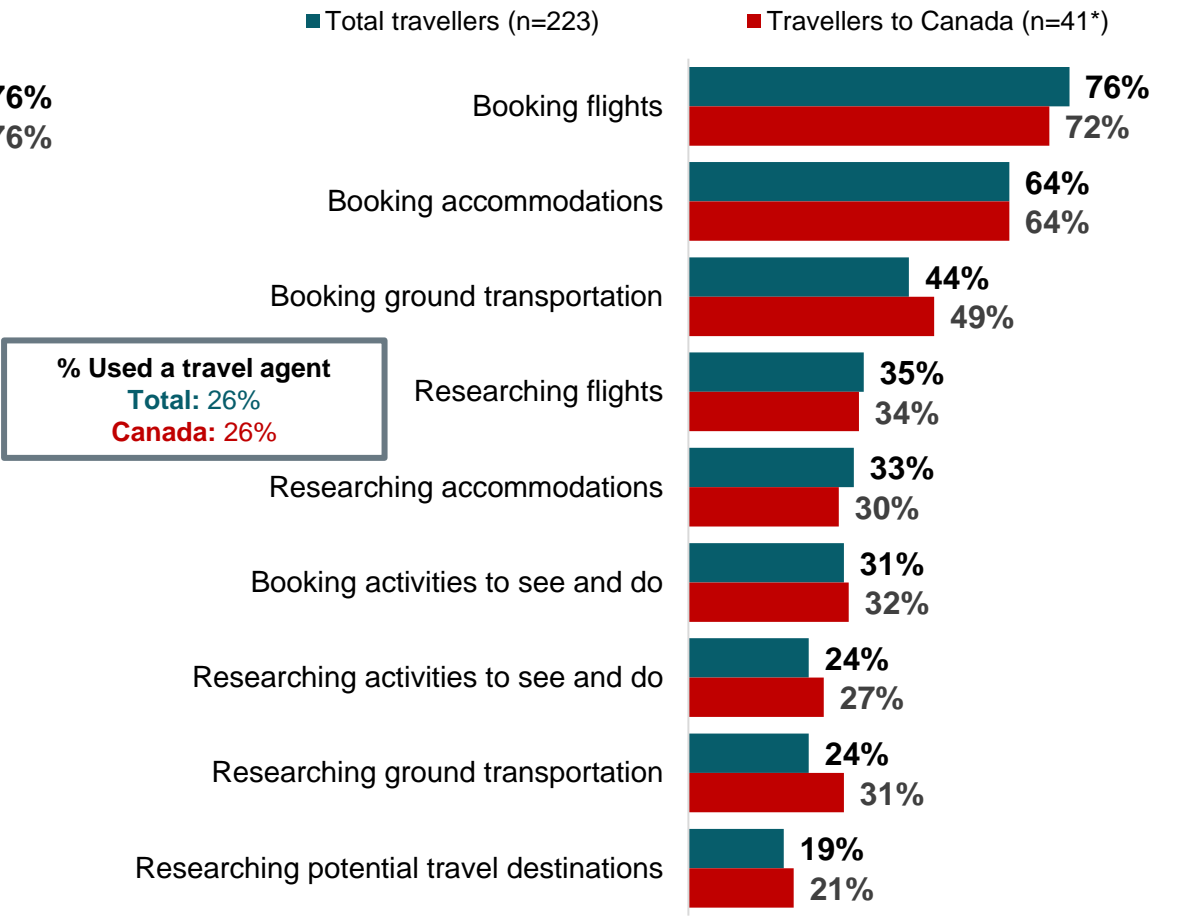
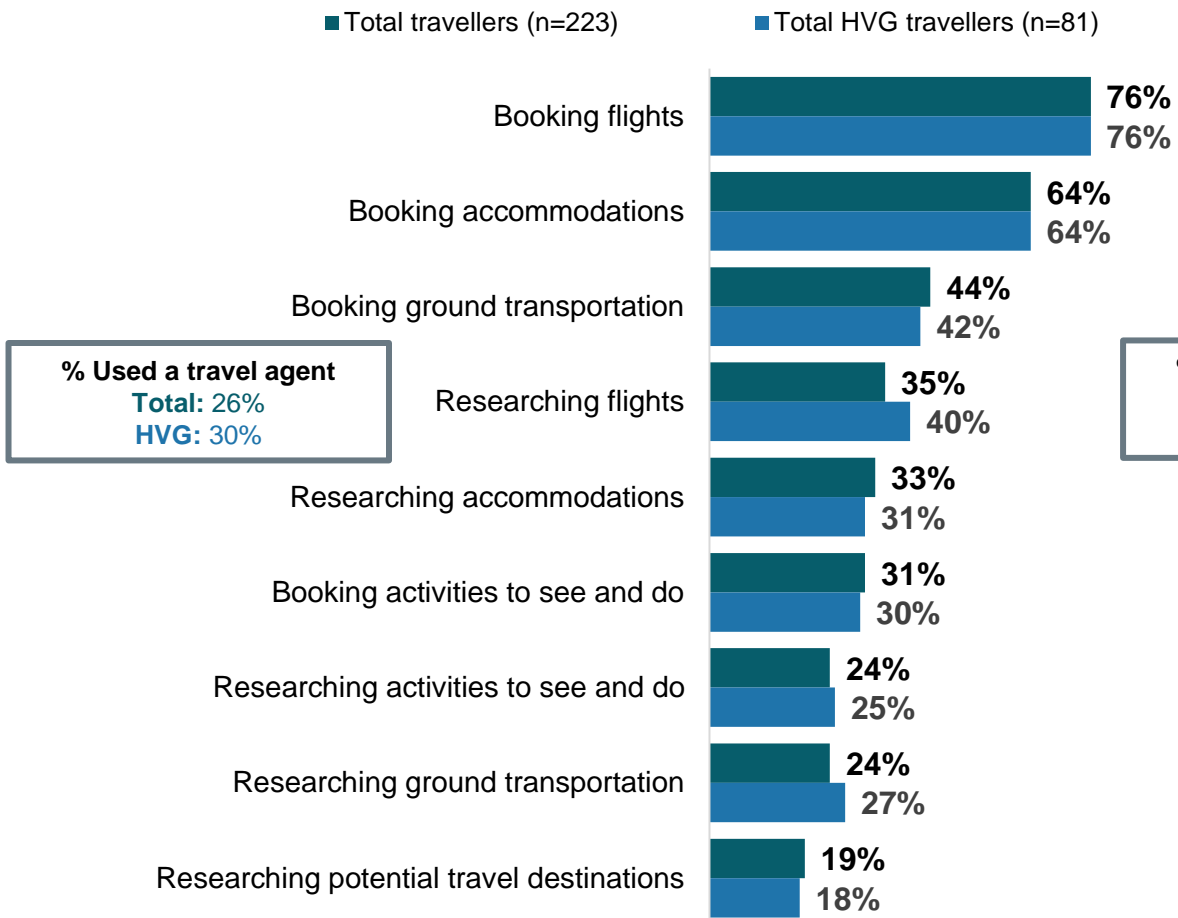


Travel Agents/Tour Operator Usage For Recent Trip



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

Total Travellers to Any Destination vs. Total Travellers to Canada



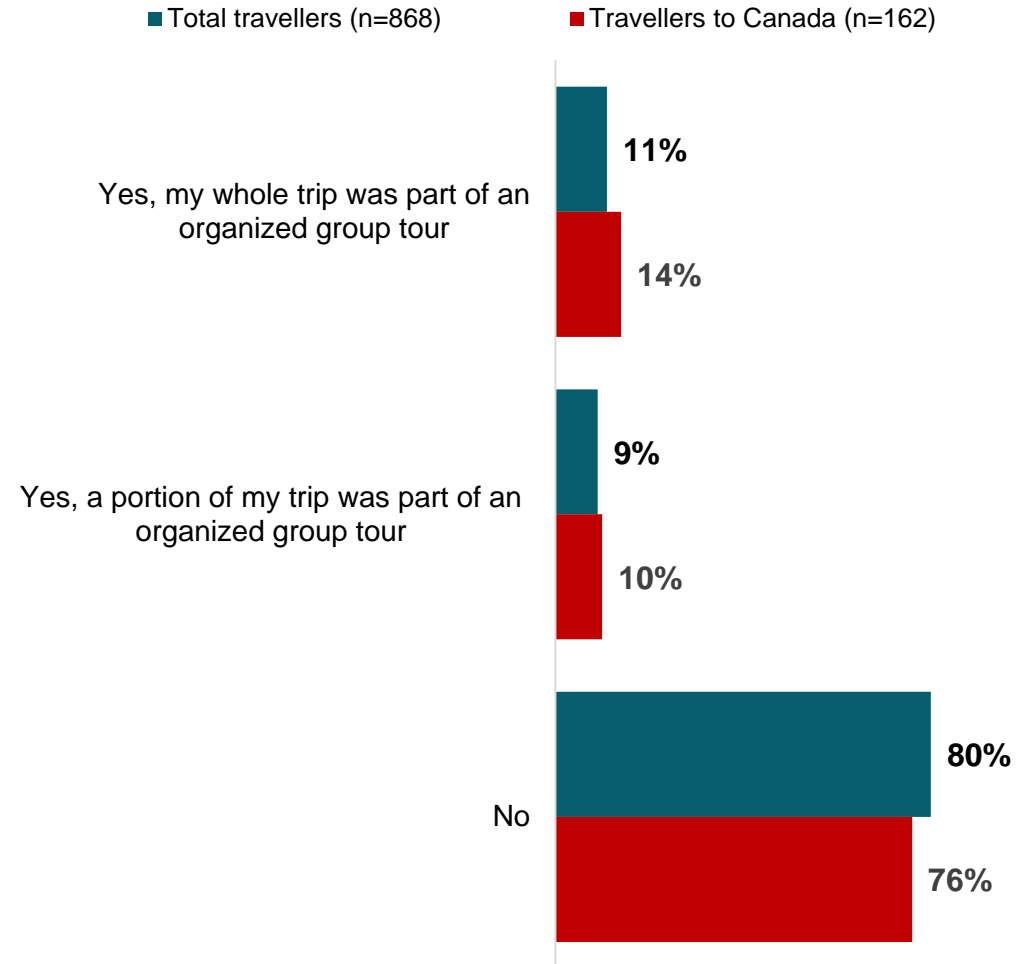
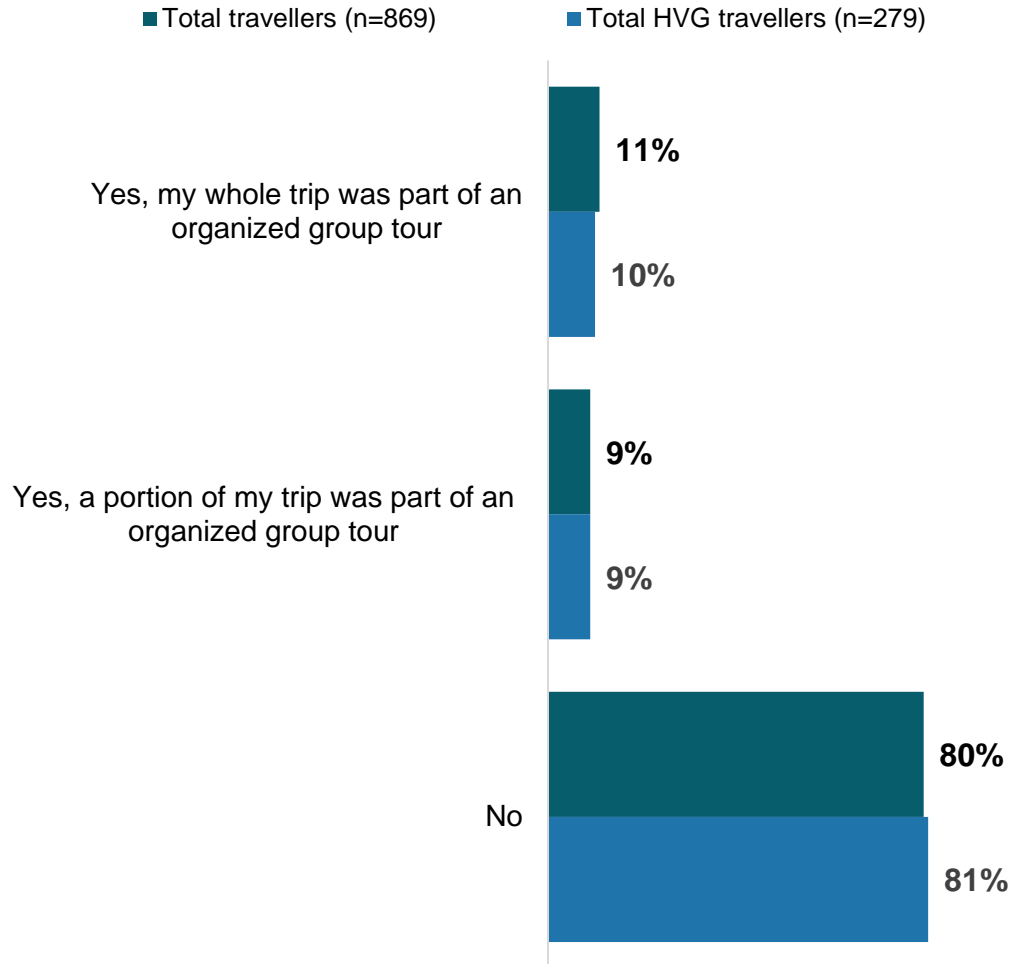
Base: Long-haul holiday travellers (past 3 years or next 2 years), Travelled to any destination, Used a Travel Agent/Tour Operator (n=223); HVG (n=81); Travellers to Canada (n=41*)
 F9. Travel agents offer personalized service to help individuals, groups, and business travellers plan and organize their 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)



Organized Group Tour Usage For Recent Trip

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

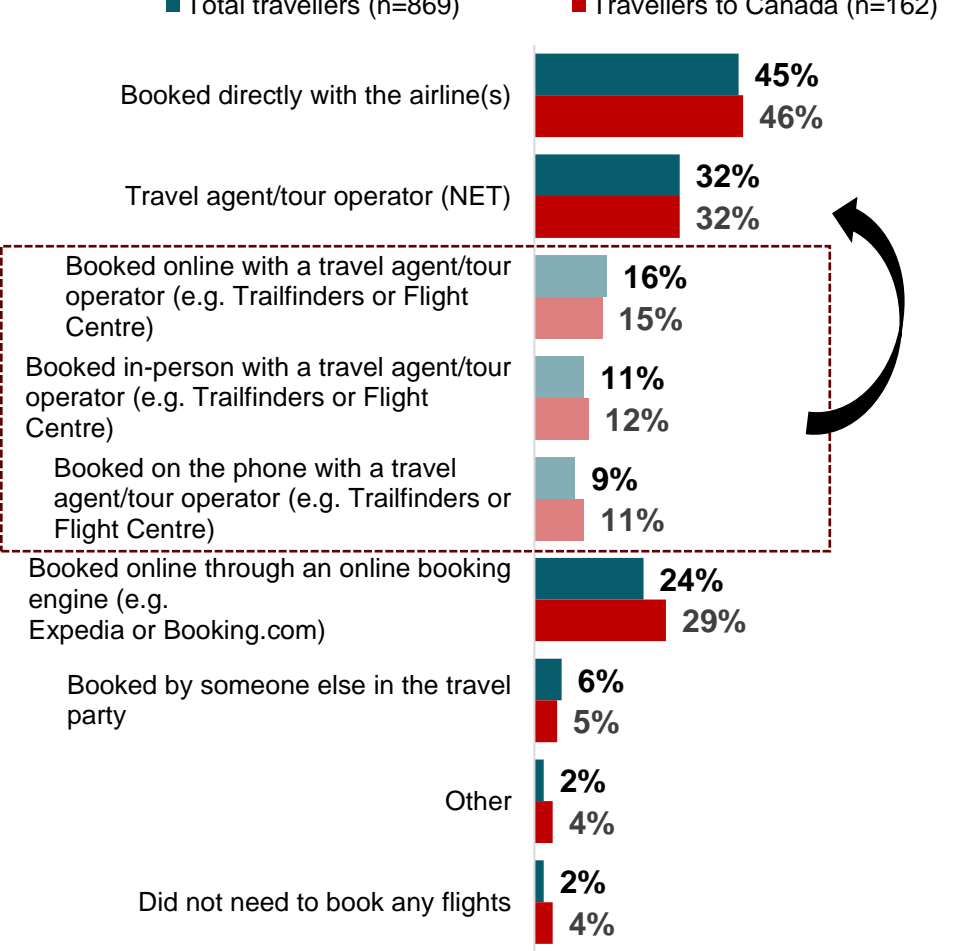
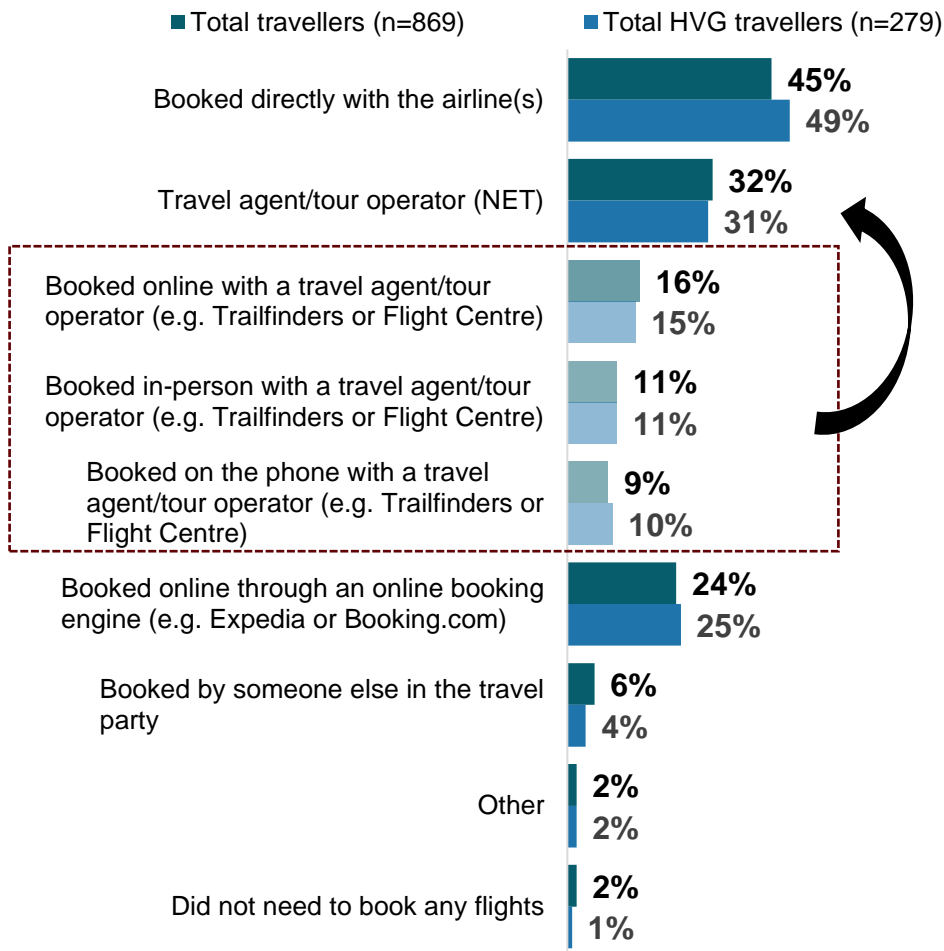
Total Travellers to Any Destination vs. Total Travellers to Canada



Booking Flights For Recent Trip

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

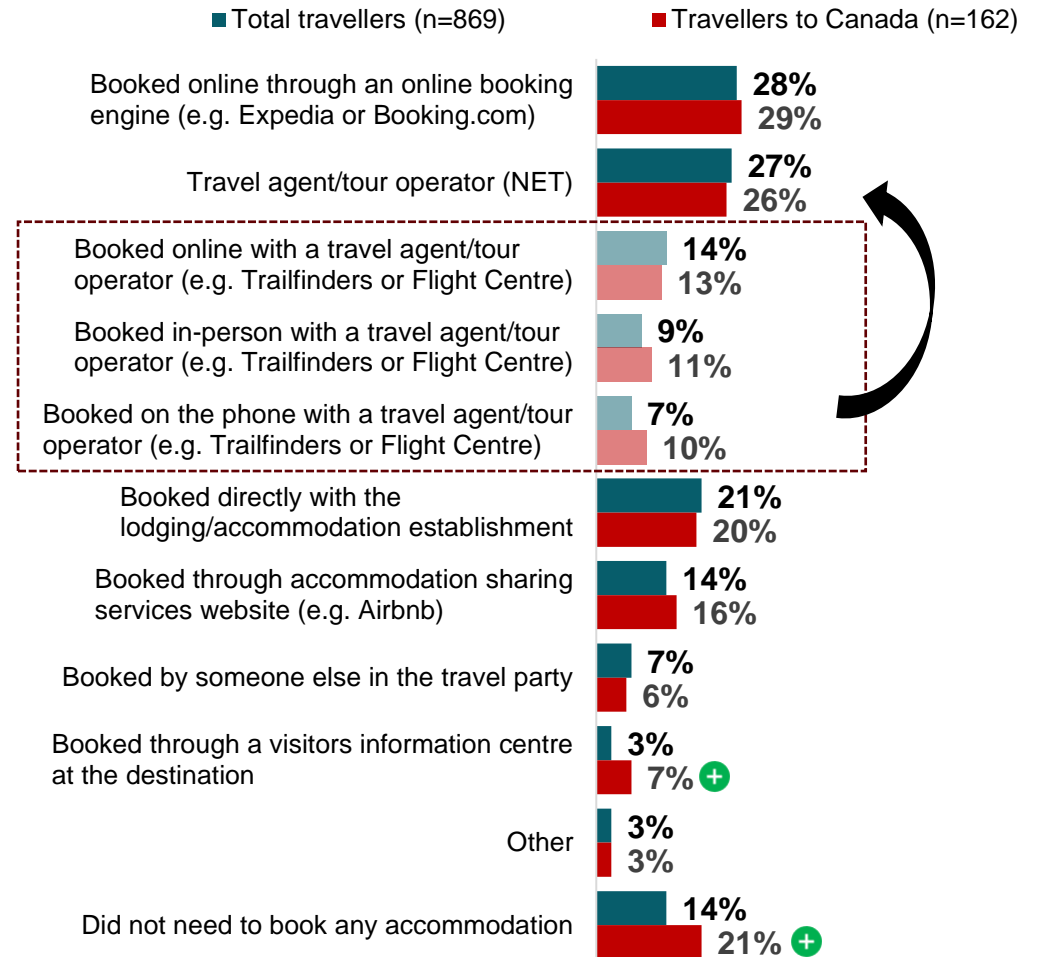
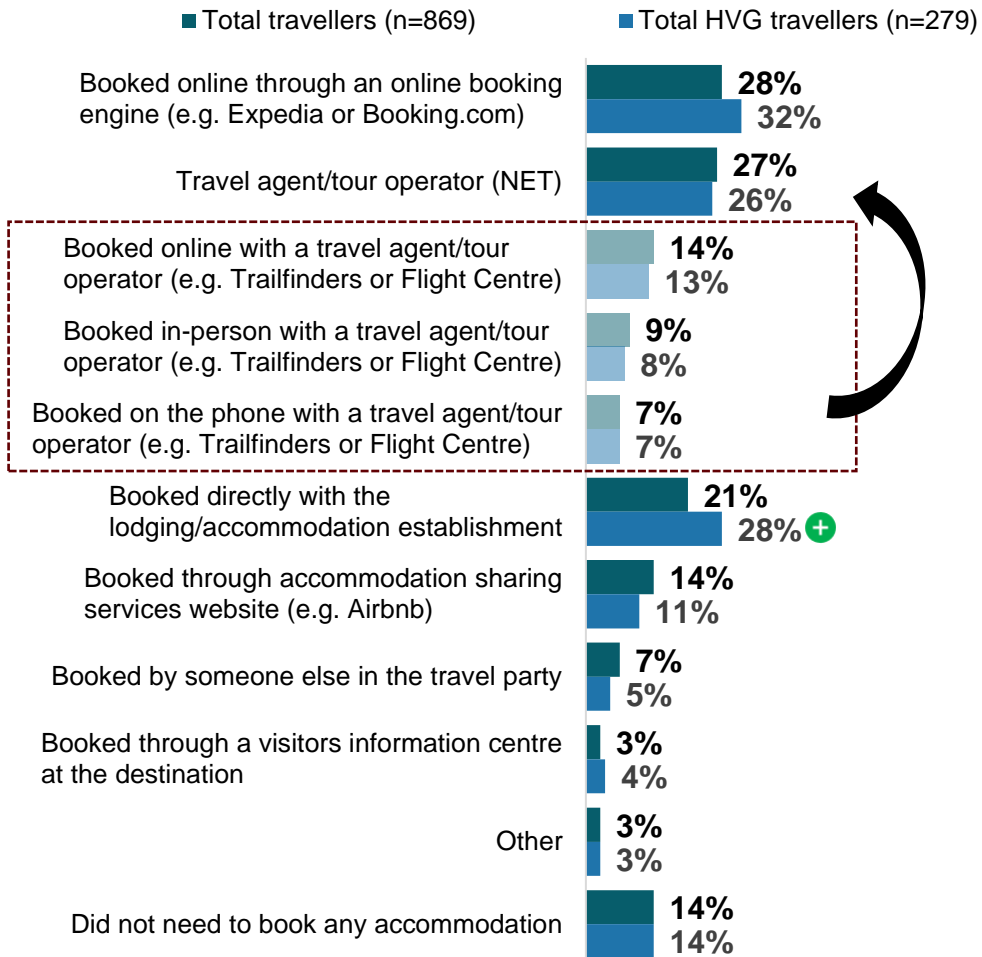
Total Travellers to Any Destination vs. Total Travellers to Canada



Booking Accommodations For Recent Trip

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

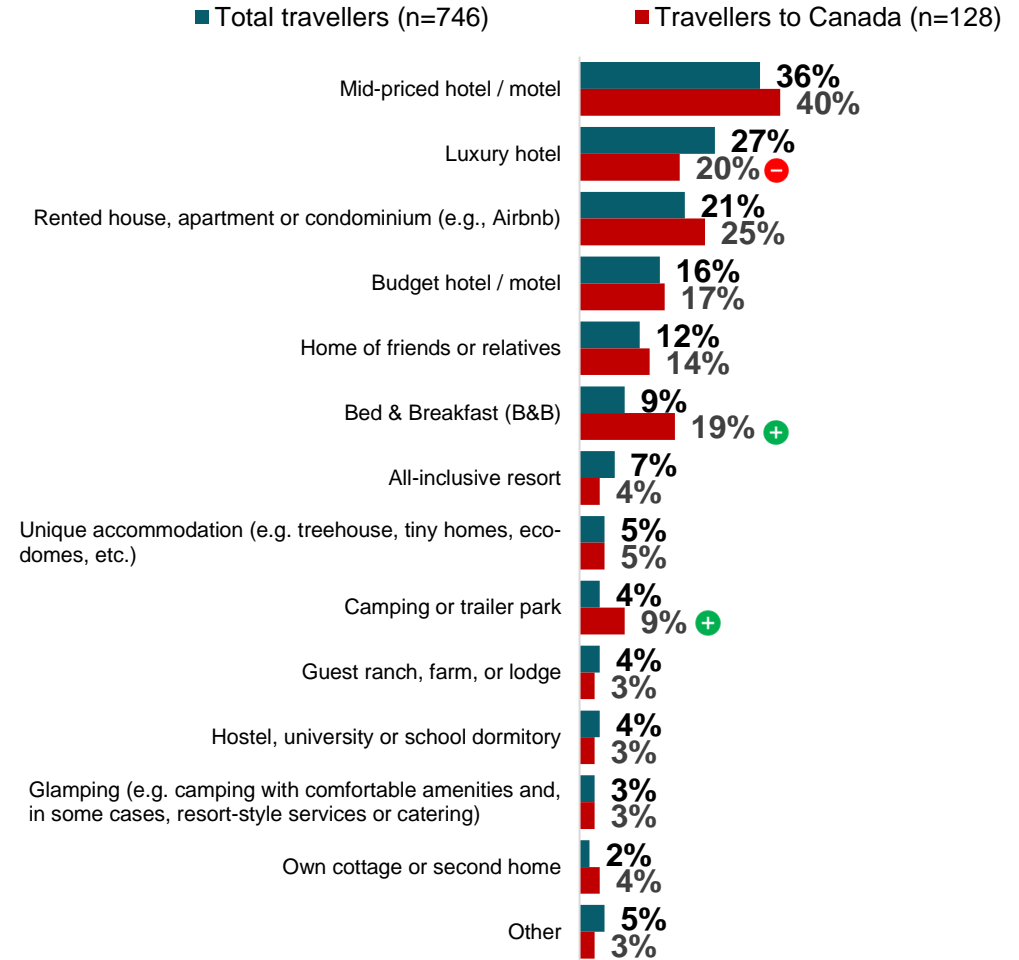
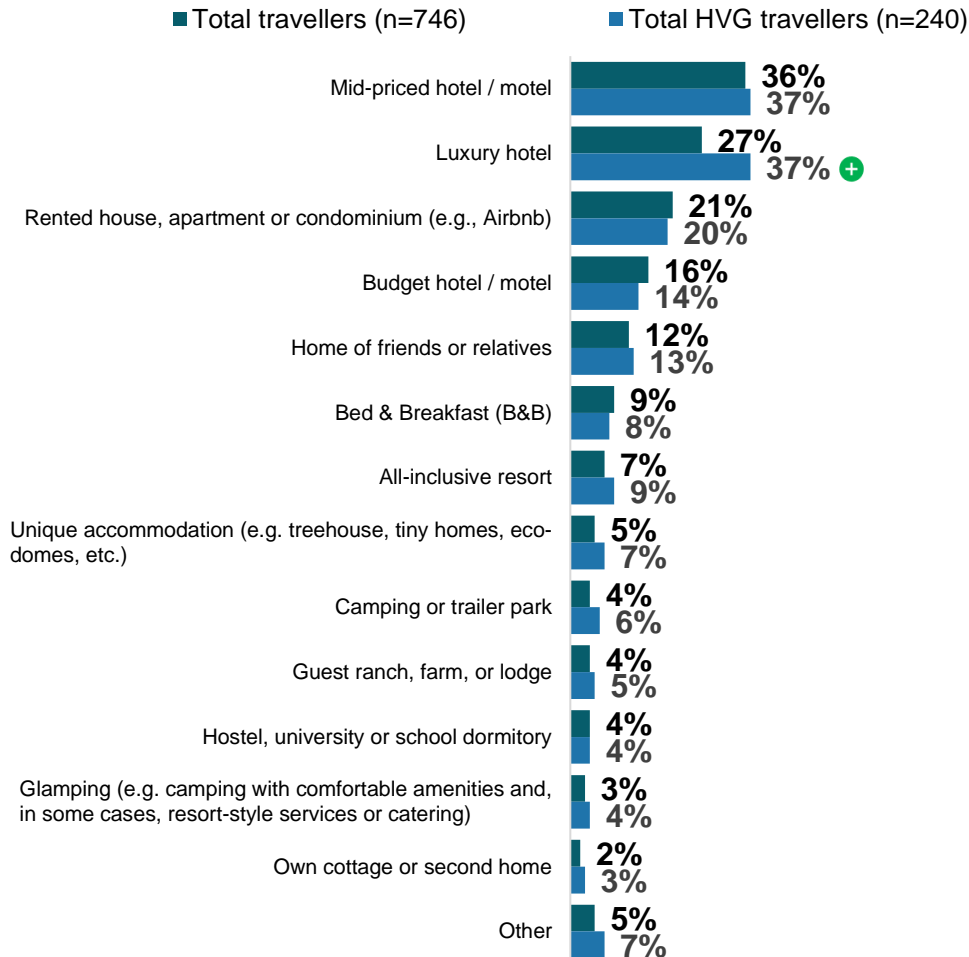
Total Travellers to Any Destination vs. Total Travellers to Canada



Type of Accommodations For Recent Trip

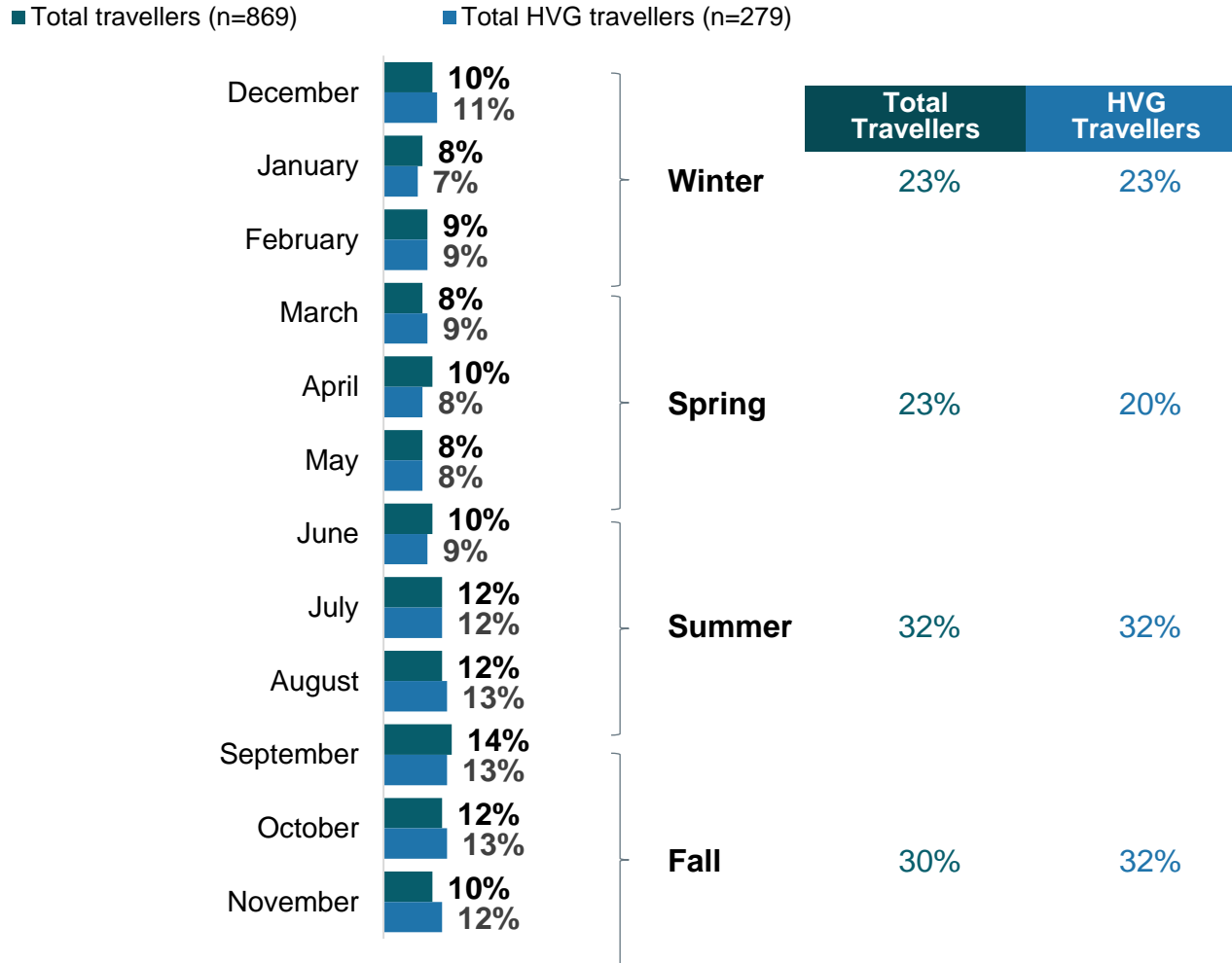
Total Travellers to Any Destination vs. HVG Travellers to Any Destination

Total Travellers to Any Destination vs. Total Travellers to Canada

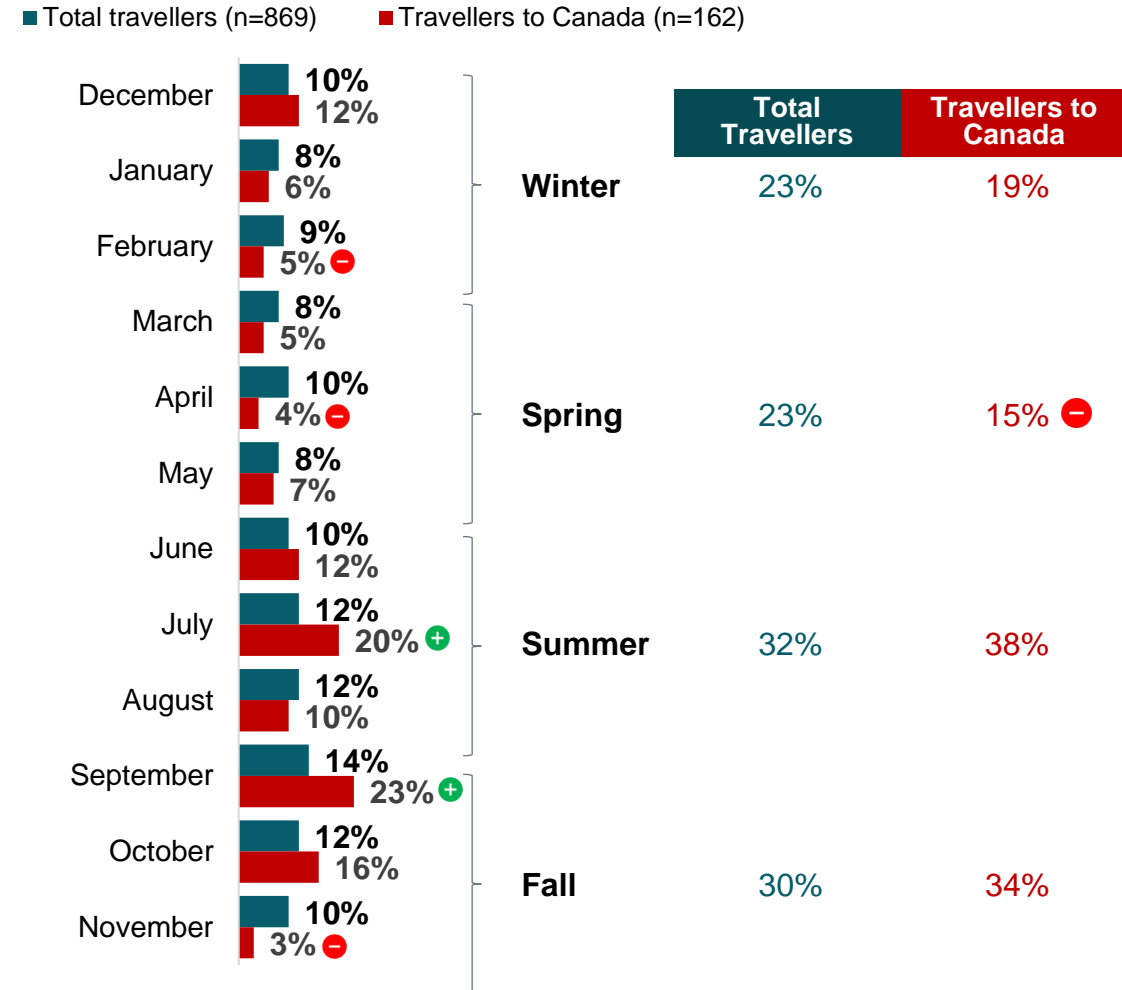


Time of Year Travelled For Recent Trip

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



Total Travellers to Any Destination vs. Total Travellers to Canada





Most Recent Trip to Canada



 Niagara Falls
Ontario

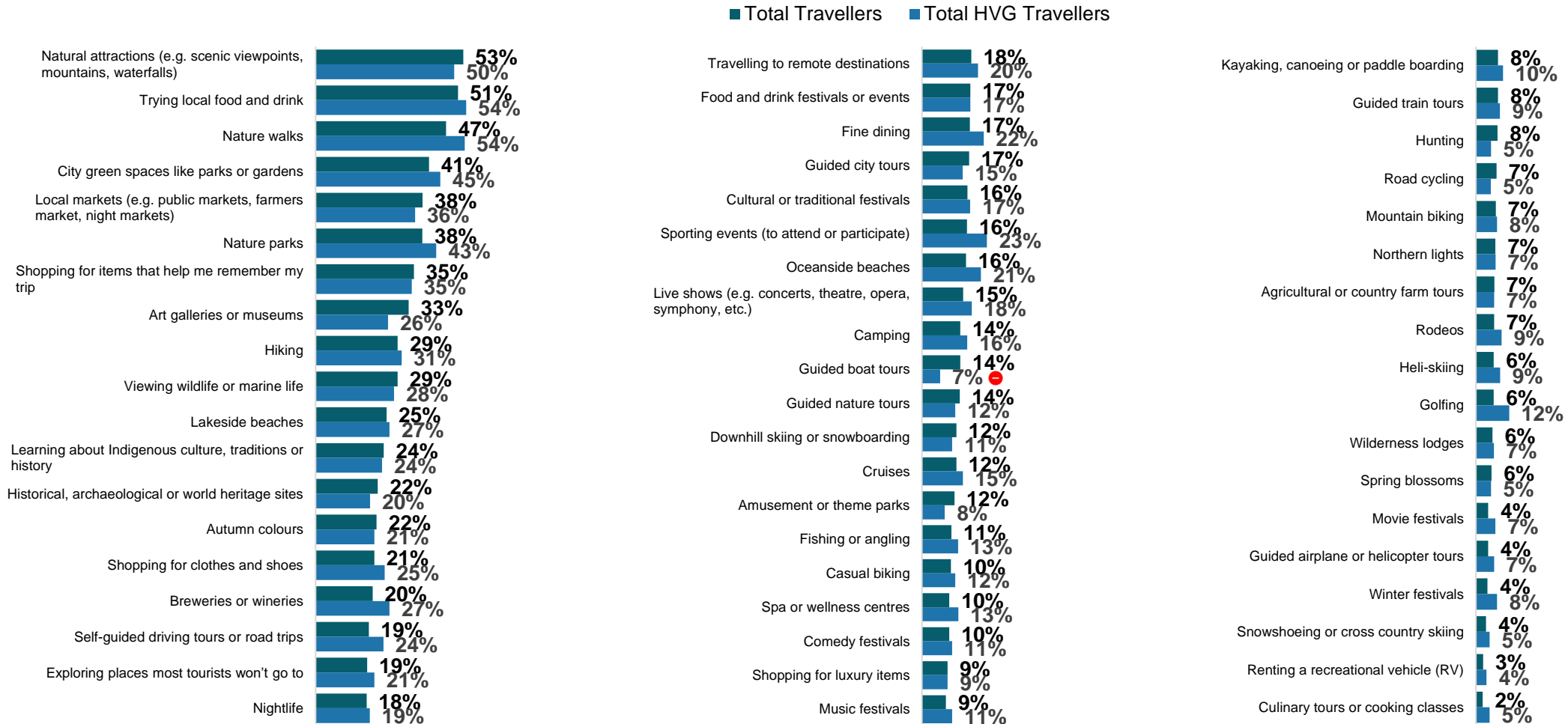


Top 10 Activities Participated in During Recent Trip to Canada



Total Travellers (n=162)	Total HVG Travellers (n=59)
Natural attractions (e.g. scenic viewpoints, mountains, waterfalls)	Trying local food and drink
Trying local food and drink	Nature walks
Nature walks	Natural attractions (e.g. scenic viewpoints, mountains, waterfalls)
City green spaces like parks or gardens	City green spaces like parks or gardens
Local markets (e.g. public markets, farmers market, night markets)	Nature parks
Nature parks	Local markets (e.g. public markets, farmers market, night markets)
Shopping for items that help me remember my trip	Shopping for items that help me remember my trip
Art galleries or museums	Hiking
Hiking	Viewing wildlife or marine life
Viewing wildlife or marine life	Breweries or wineries

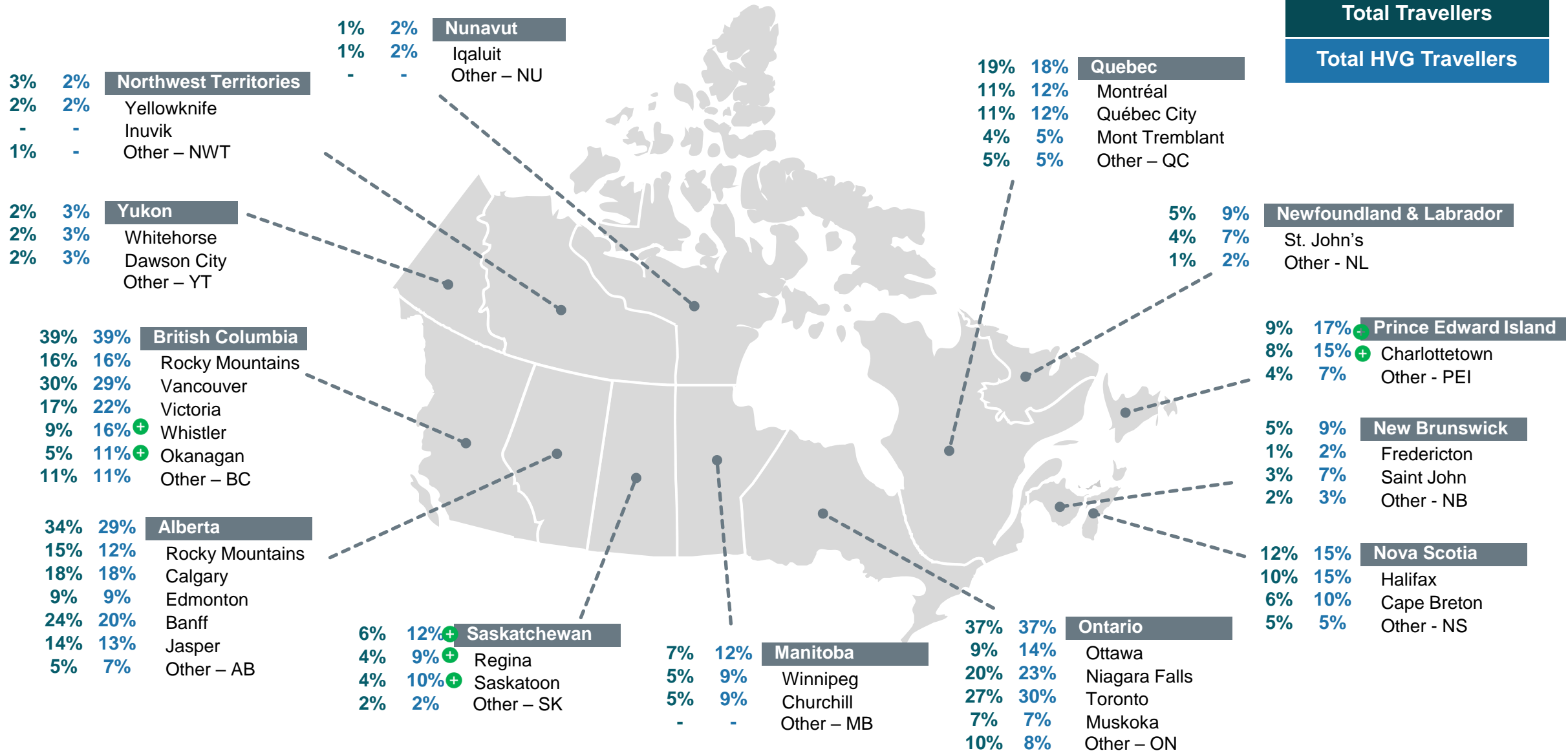
Activities Participated in During Recent Trip to Canada



Canadian Destinations Visited During Recent Trip



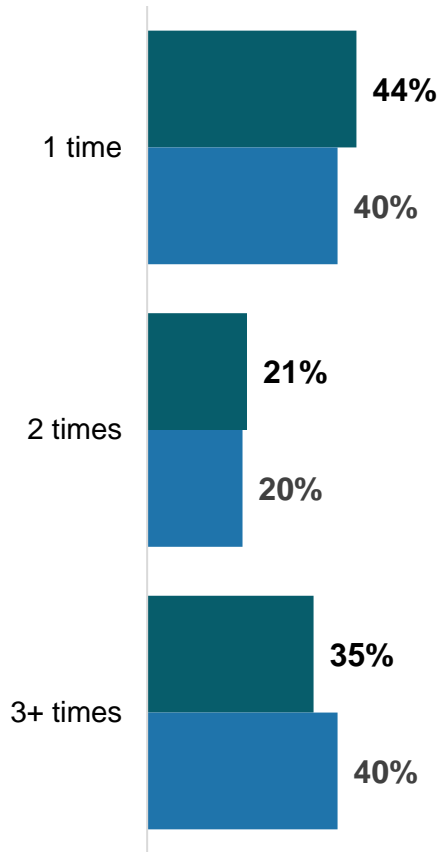
Total Travellers
Total HVG Travellers



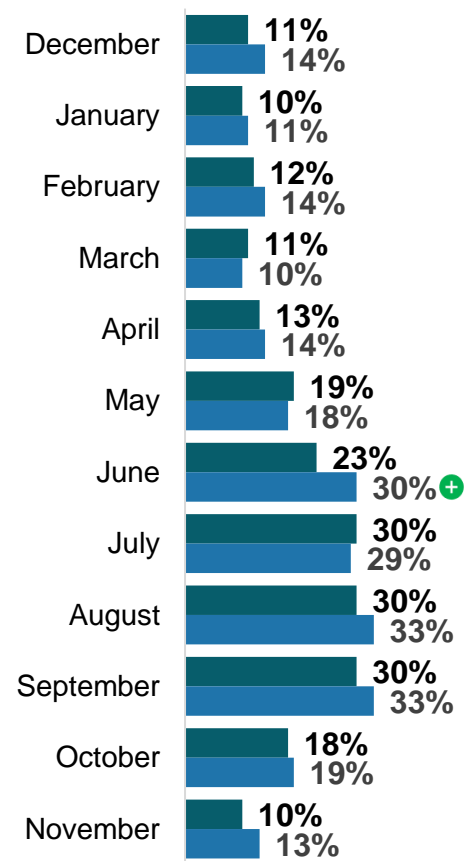
Number of Visits Ever & Time of Year Visited Canada



■ Total Travellers ■ Total HVG Travellers



■ Total Travellers ■ Total HVG Travellers



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



Demographics

	All Long-haul Travellers (n=1532)	HVG Audience (n=333)
Gender		
Male	53%	59% +
Female	48%	41% -
Age		
18 to 34	33%	26% -
35 to 54	32%	28%
55 or older	35%	46% +
Children in household under the age of 18		
Yes	34%	30%
Employed		
Yes	64%	58% -
Identify as LGBTQ+		
Yes	11%	10%
Household Income (Annually)		
Under £25,000	12%	5% -
£25,000 to £44,999	21%	11% -
£45,000 to £59,999	12%	4% -
£60,000 or more	34%	71% +

THANK YOU

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



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