

CONFIDENTIAL

# 2023 GLOBAL TRAVELLER RESEARCH PROGRAM

## SYNDICATED REPORT

### UNITED KINGDOM MARKET OVERVIEW



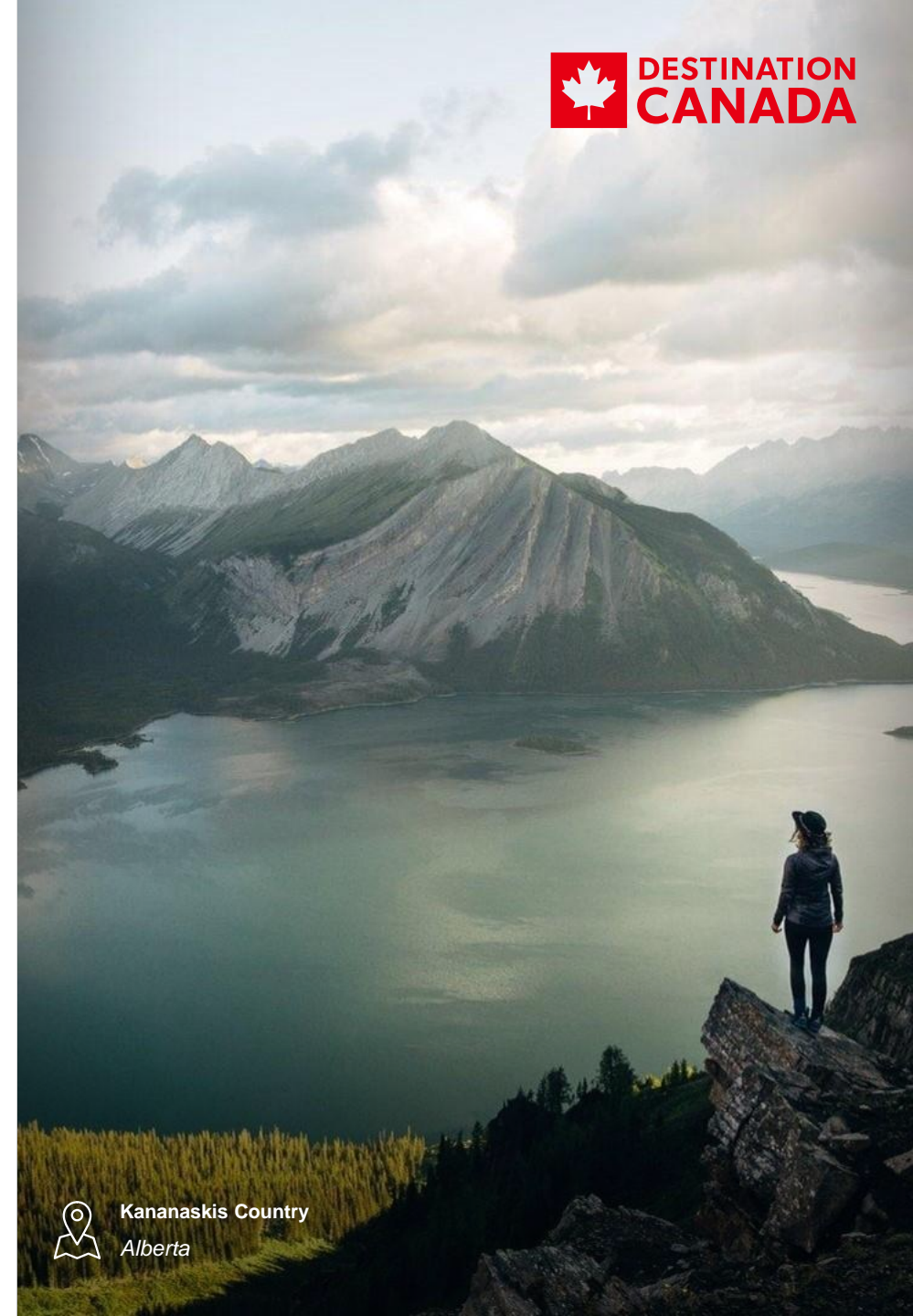
CANADIAN TOURISM DATA  
**collective**



# UK Market Overview

*An annual view of the UK market to help understand general trends towards travel and how Canada fares against competitors on key destination brand metrics.*


Please note that the insights in this report are drawn from two of YouGov's proprietary syndicated data products, **YouGov Global Travel Profiles** and **YouGov DestinationIndex**. As a result, access to and sharing of this report and its underlying data are restricted to those within Destination Canada's organization and among organizations with access to the Canadian Tourism Data Collective (CTDC).



Kananaskis Country  
Alberta


## YouGov® Global Travel Profiles

YouGov Global Travel Profiles (GTP) surveys consumers daily in 30 key travel origin markets, to help travel & tourism organizations identify who is ready to travel when, where they want to go and what kind of trip they are planning.




**Survey Start in United Kingdom**

October 20, 2020



**Methodology Notes**

Attitudinal statements are integrated into YouGov Global Travel Profiles platform from another YouGov study. These questions have lower sample sizes than other variables.




**2023 Base Sizes**

Sample distribution: **National 18+**

Total UK: **26,071**


## YouGov<sup>®</sup> DestinationIndex

**YouGov DestinationIndex** is an always-on destination brand tracker. Daily data enables you to spot sentiment changes in real-time and take action, while measuring and benchmarking performance. Track public perception of Canada and other destinations across 16 brand metrics to track destination brand health, inform strategy and ultimately influence travellers' perception of Canada.




**Survey Start in United Kingdom**

April 20, 2020



**Methodology Notes**

Maximum of 30 destinations shown to any panel member at any given time, with sample split accordingly as more than 30 destinations are tracked. Destinations are added to the tracker on an on-going basis.



**2023 Base Sizes**

Sample distribution: **National 18+**

Total UK: **13,402 - 18,053**

# Syndicated Product Overview



## YouGov<sup>®</sup> Destination Index

### 16 key metrics

#### Engagement: Media & communication metrics

- Advertising Awareness**  
1 Which of the following destinations have you seen an advertisement for in the PAST TWO WEEKS?
- Aided Awareness**  
2 Which of the following destinations have you ever heard of? Please select all that apply.
- Attention**  
3 Respondents hearing positive OR negative buzz about the destination.
- Buzz**  
4 Over the PAST TWO WEEKS, which of the following destinations have you heard something POSITIVE about (whether in the news, through advertising, or talking to friends and family)? Now which of the following have you heard something NEGATIVE about over the PAST TWO WEEKS?
- Word of Mouth Exposure**  
5 Which of the following destinations have you talked about with friends or family in the PAST TWO WEEKS (whether in-person, online, or through social media)?

#### Lower funnel metrics

- Purchase Intent**  
6 Which of the proposed destinations are you most likely to visit?
- Consideration**  
7 When you are in the market next to plan a vacation or a fun day out for yourself / your family, which destinations would you consider?
- Recent Visitor (Current Customer)**  
8 Which of the following destinations have you visited in the past 12 months?
- Former Visitor (Former Customer)**  
9 Which of the following destinations have you ever visited?

#### Destination / Brand health metrics

- General Impression**  
10 Overall, of which of the following destinations do you have a POSITIVE impression? Now which of the following destinations do you have an overall NEGATIVE impression?
- Visitor Satisfaction**  
11 Of which of the following destinations would you say that you are a "SATISFIED VISITOR"? Of which of the following destinations would you say that you are a "DISSATISFIED VISITOR"?
- Quality**  
12 Which of the following destinations do you think have a GOOD QUALITY? Now which of the following destinations represents POOR QUALITY?
- Value**  
13 Which of the following destinations do you think represents GOOD VALUE FOR MONEY? By that we don't mean 'cheap,' but that the destinations offer a visitor a lot in return for the price paid. Now which of the following destinations do you think represents POOR VALUE FOR MONEY? By that, we don't mean 'expensive,' but that the destinations do not offer a visitor much in return for the price paid.
- Reputation**  
14 Which of the following destinations do you regard as having a GOOD reputation for vacations? Now which of the following destinations do you regard as having a POOR reputation for vacations?
- Recommendation**  
15 Which of the following destinations would you RECOMMEND to a friend or colleague? And which of the following destinations would you tell a friend or colleague to AVOID?
- Index (Overall Destination Health)**  
16 Average of Impression, Quality, Value, Reputation, Satisfaction & Recommend



## Brits love international travel, but post-pandemic growth is slowing

- More Brits say they prefer vacationing abroad than within the UK
- Roughly half of Brits are planning to travel internationally, near level with the number planning domestic travel
- Incidence of those planning international travel increased for the second consecutive year, albeit at a slower rate



- *Understanding the evolving preferences and behaviors of Brits in international travel can inform targeted strategies to capture their interest and enhance Canada's appeal as a top destination*



## Economic pressures are impacting Brits' ability to travel abroad

- Brits are planning fewer trips than in years past
- Price of travel and price of accommodation are the most common obstacles preventing travel
- 42% of Brits mention overall value for money as an influence when choosing a destination
- More Brits are booking during off-peak periods



- *With fewer trips planned, competition intensifies among destinations to attract British travellers. The increasing trend of Brits booking outside school breaks offers an opportunity for Canada to attract visitors during off-peak periods*



## Brits want cultural experiences and city adventures when travelling

- 81% of Brits agree that you can only ever get to know a country by experiencing its culture
- City breaks are Brits' favourite types of trips, while natural beauty is declining as an influence of destination choice



- *Highlighting the diverse and enriching city experiences across Canada could emphasize cultural depth and resonate with Brits, aligning with their travel preferences and fostering a strong connection with Canada*



## The UK market is becoming more competitive

- Consideration is up for most destinations within the competitive set
- Ad awareness and word of mouth is up for most destinations
- Advertising for the US and Australia was far reaching but ineffective as no key performance metrics increased alongside their increased ad awareness
- More advertising channels are cited as effective for destination marketers to reach British travellers




- *In an increasingly competitive market, strategic ad spend and prioritizing conversion tactics are vital to stand out and avoid stagnation in consideration among British travellers*





# United Kingdom Market Overview



 Peggy's Cove  
Nova Scotia

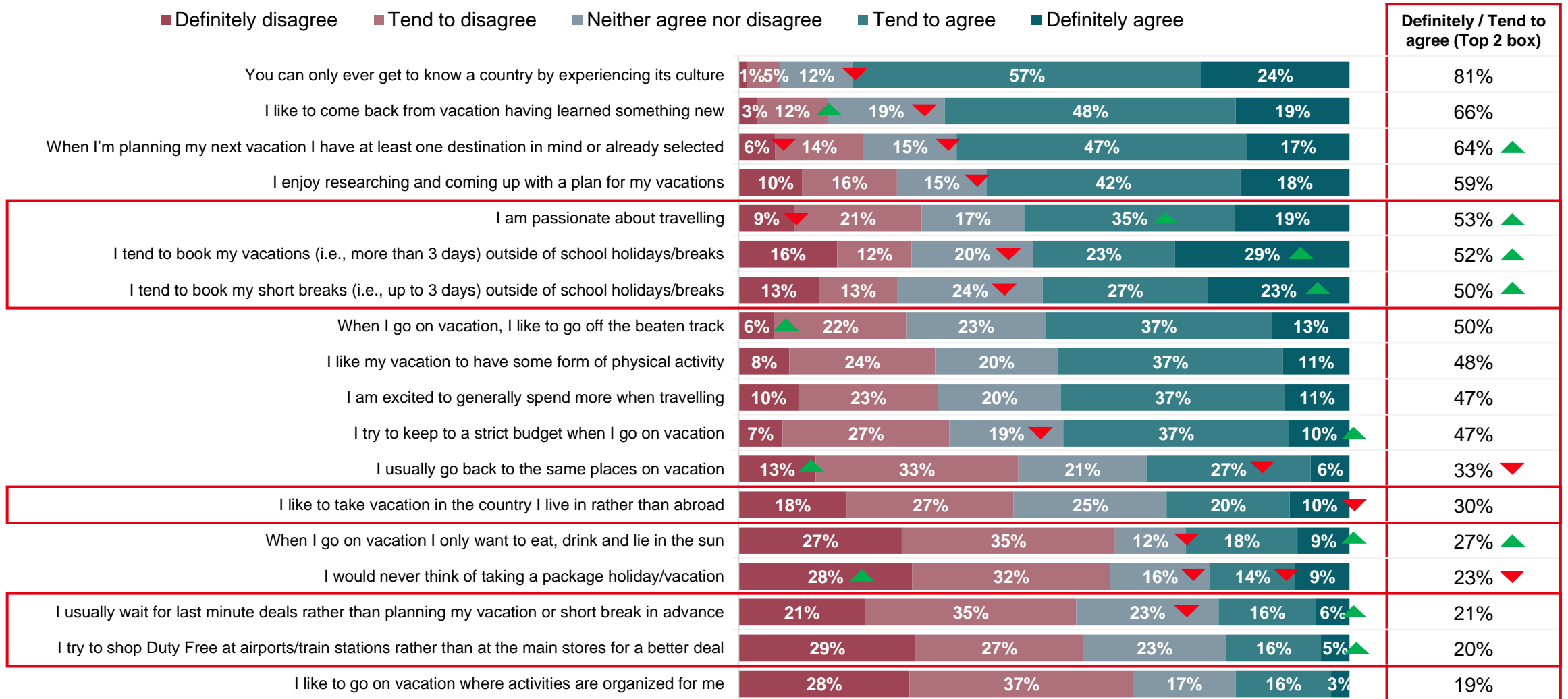


# Attitudes Towards Travel



*There is an increase in passion for travel and booking trips outside of school holidays/breaks, and a shifting preference from domestic to international travel; however, Brits are also becoming increasingly cautious about spending by adhering to a budget, waiting for last minute deals and shopping at Duty Free*

■ Definitely disagree  
 ■ Tend to disagree  
 ■ Neither agree nor disagree  
 ■ Tend to agree  
 ■ Definitely agree





# Trip Types Planned in Next 12 Months

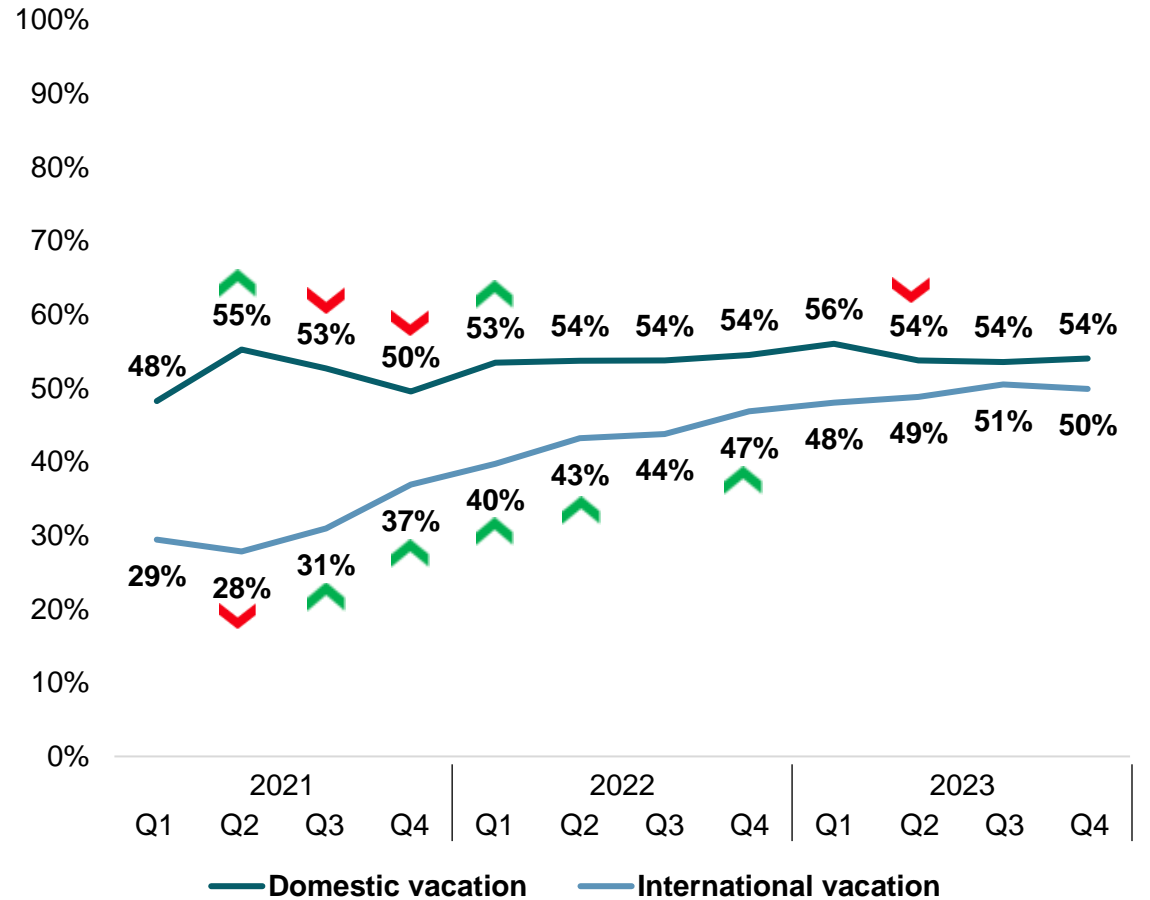


The incidence of those planning international vacations has increased for the second consecutive year to further close the gap with domestic vacations, albeit at a decelerated rate in the latter half of 2023. Planned business travel also experienced growth in 2023

## Trip Types Planned in Next 12 Months



## Vacation Trips Planned in Next 12 Months (Trended)



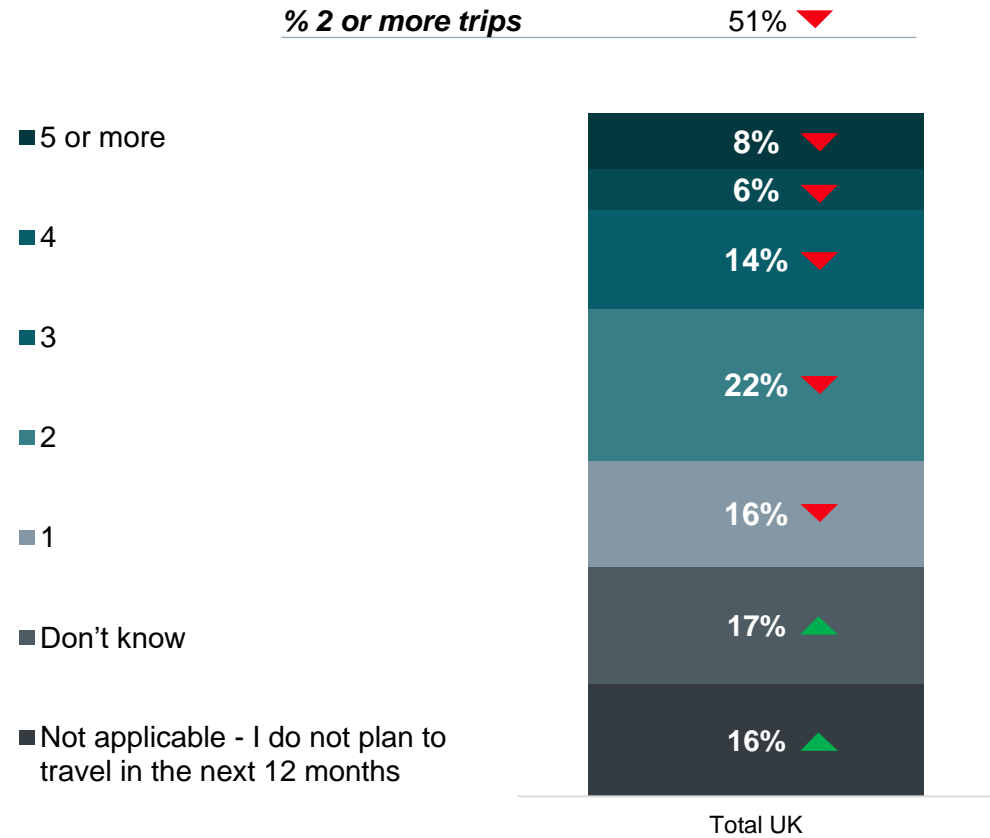
9 2023 Base: UK Residents 18+ (n=26,071)  
 2021-2023 Quarterly Trending Base Range: UK Residents 18+ (n=6,386-7,539)  
 Q: Which, if any, of the following trips are you planning to take in the next 12 months?  
 Please select all that apply.

# Number of Trips Planned in Next 12 Months

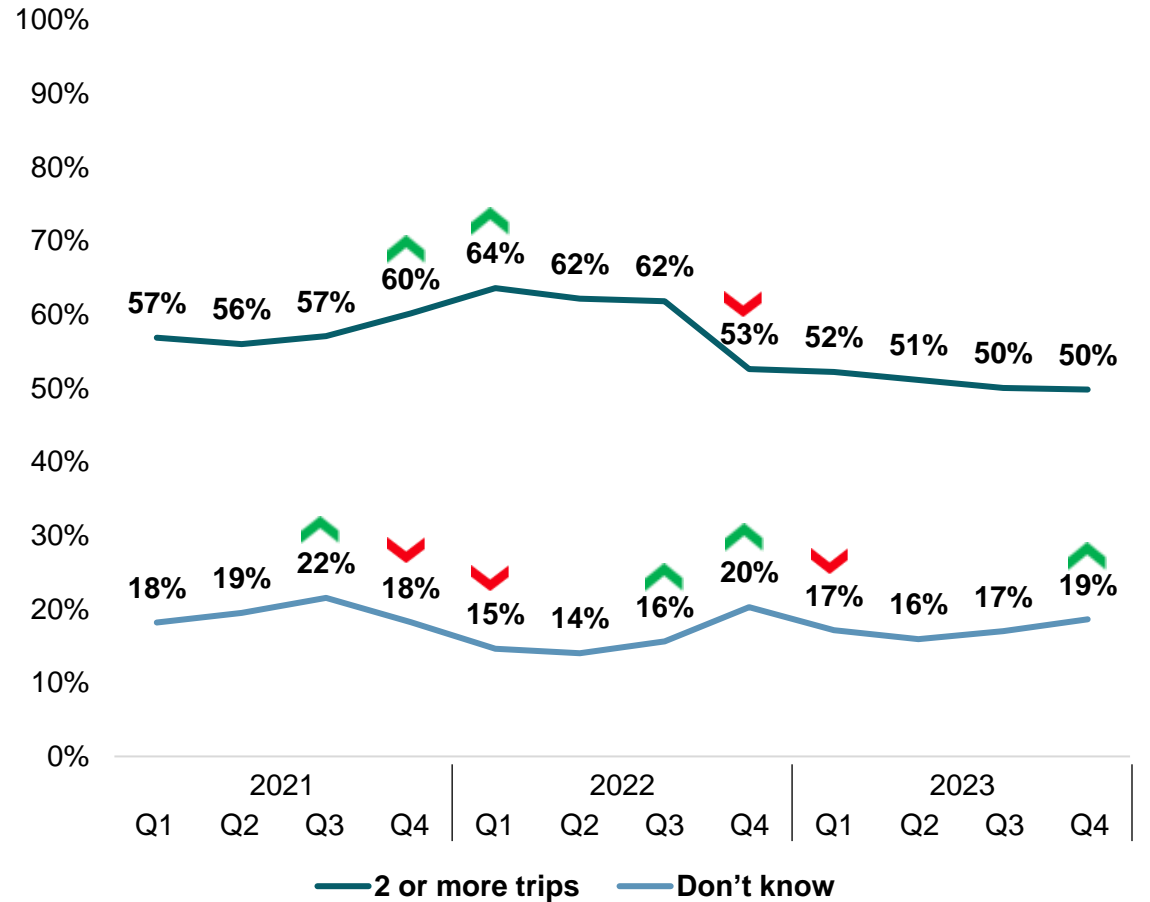


Despite the rise of international travel intentions, Brits are planning fewer trips than in years past possibly driven by inflation

## Number of Trips Planned



## Number of Trips Planned (Trended)

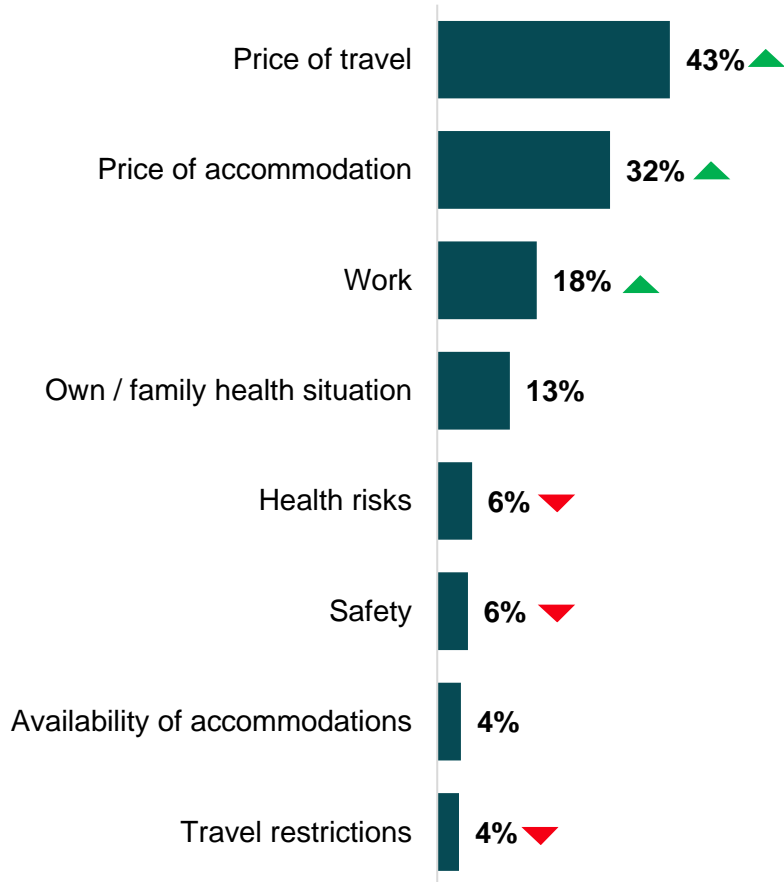


# Factors Preventing Travel

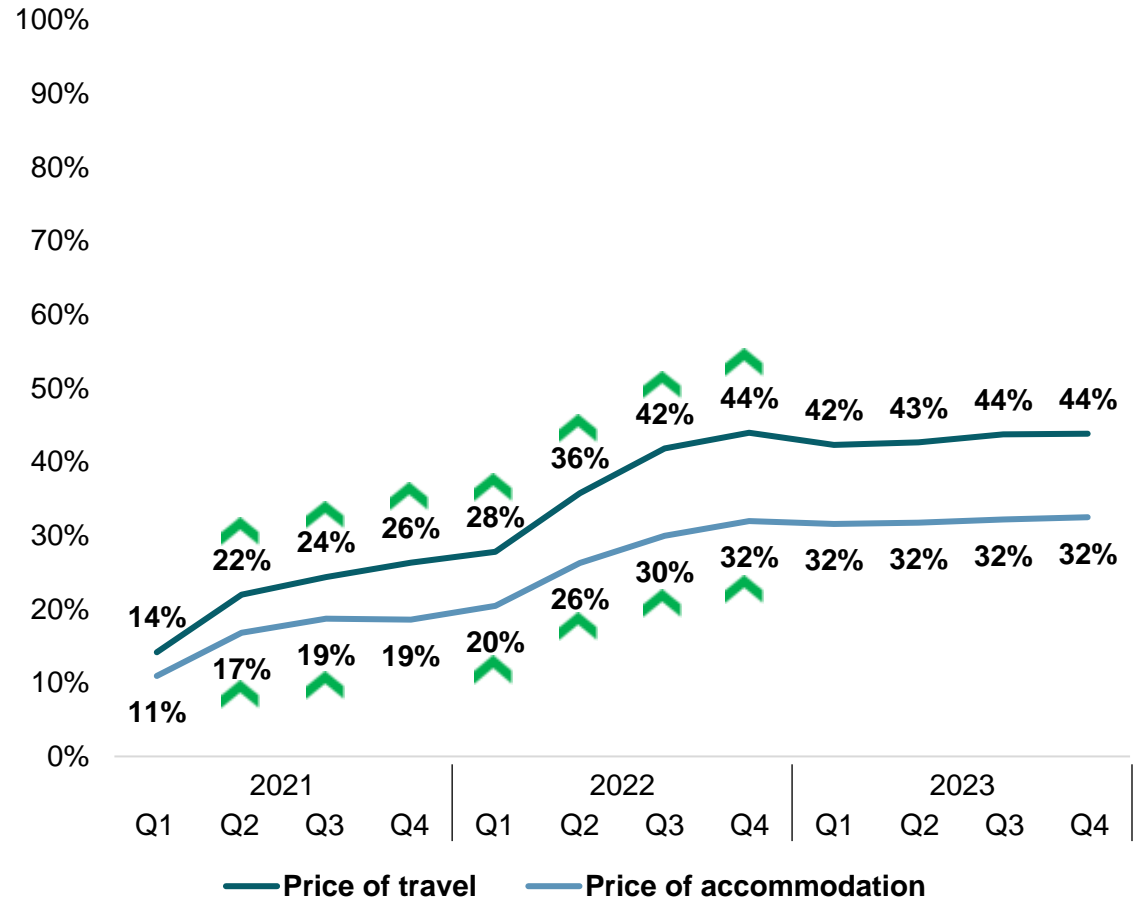


*Inflation has driven travel and accommodation costs higher pushing it to become major travel obstacles; however, mentions for both plateaued over the course of 2023, suggesting a potential easing of these challenges*

## Factors Preventing Travel



## Select Factors Preventing Travel (Trended)



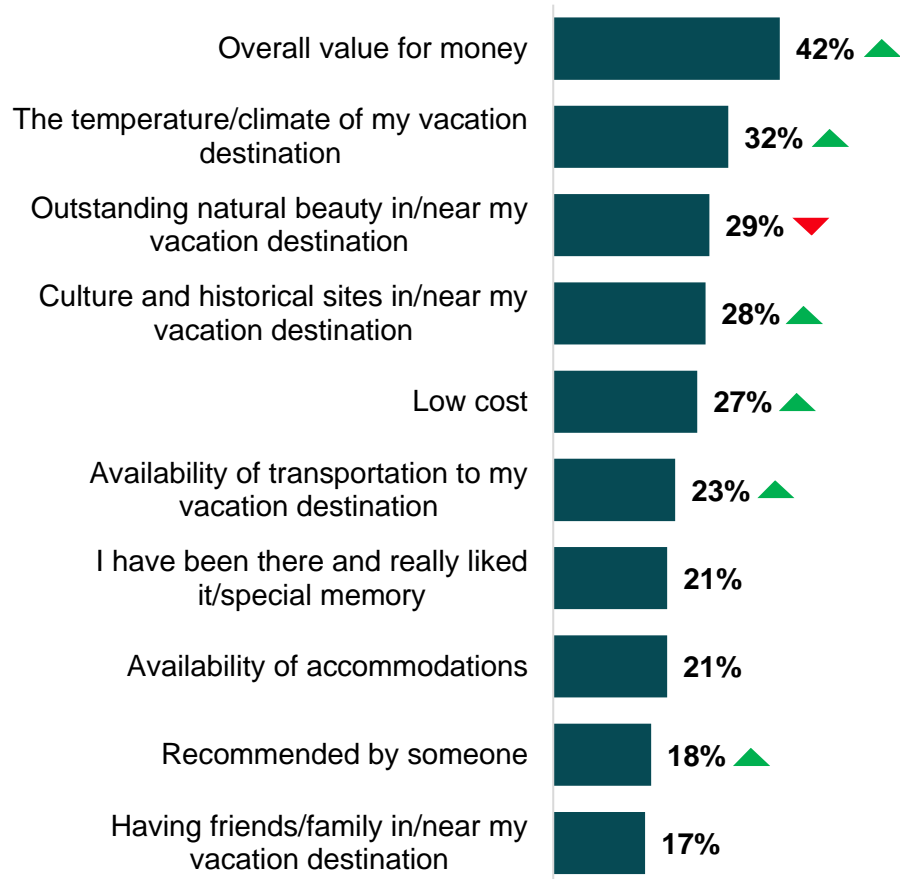


# Destination Choice Influences

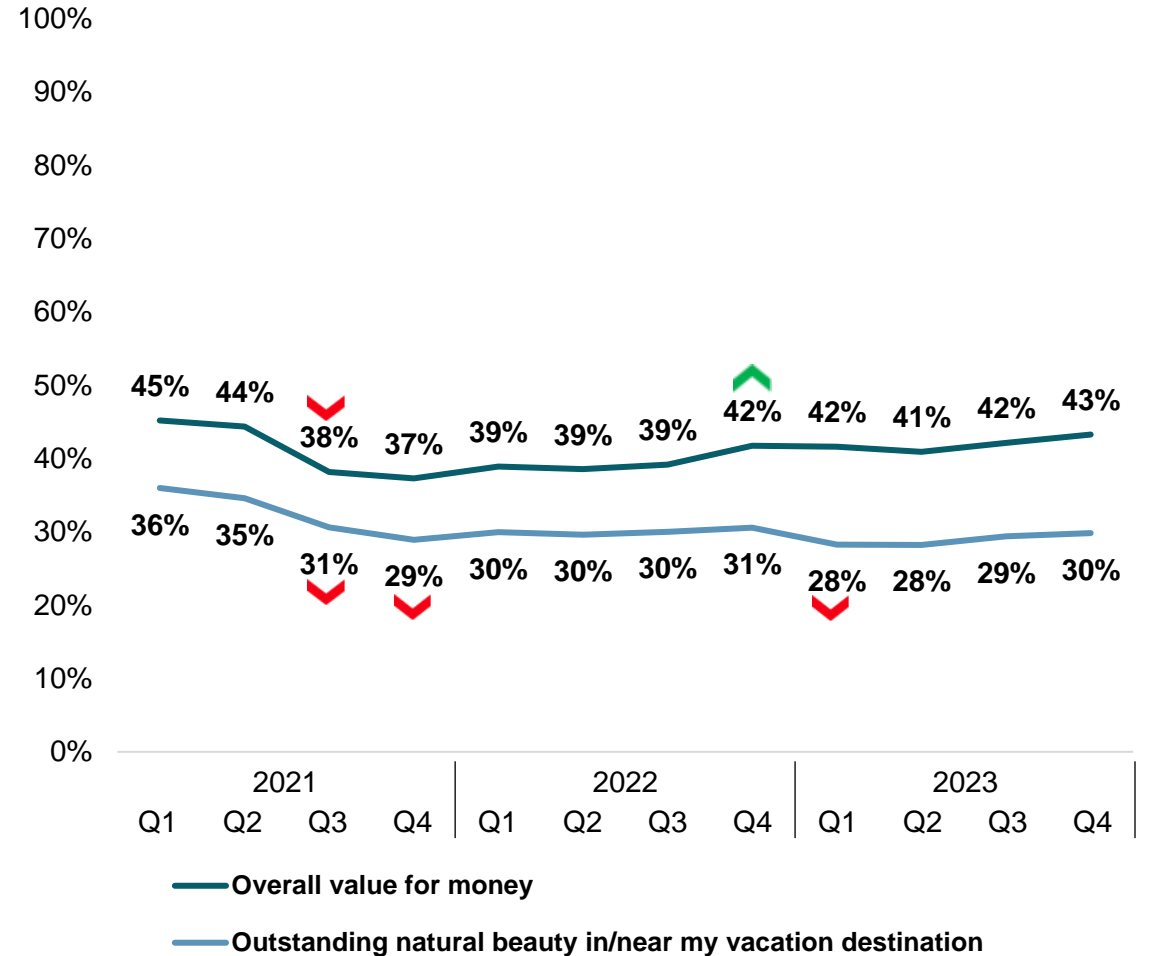


Similarly, overall value for money and low cost are high on the list of destination choice influences, ranking first and fifth, respectively. Mentions of outstanding natural beauty as an influence are down for the second straight year

## Destination Choice Influences (Top Responses)



## Select Destination Choice Influences (Trended)

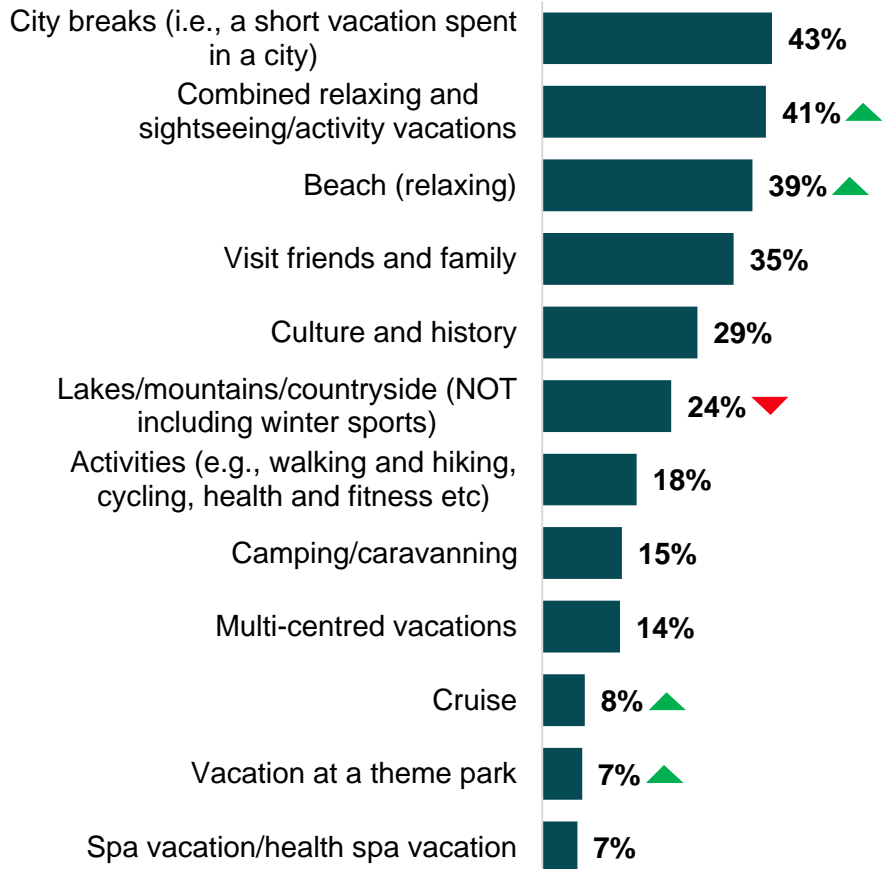


# Favourite Types of Vacations

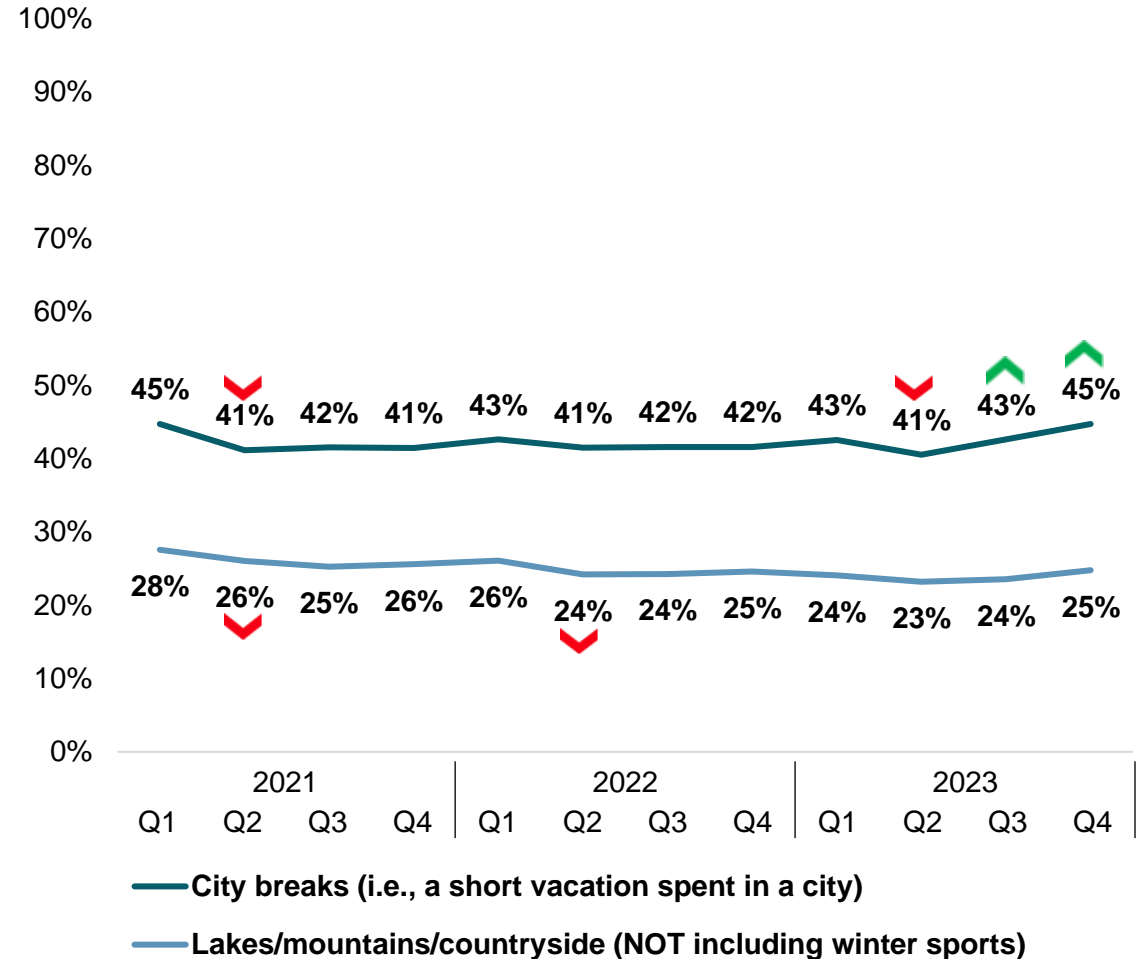


*Brits' favourite types of vacations are city-focused, relaxing, or a combination of the two, potentially driven by the UK's proximity to Europe providing plenty of options for both city and beach trips*

## Favourite Types of Vacations (Top Responses)



## Select Favourite Types of Vacations (Trended)



2023 Base: UK Residents 18+ (n=26,071)  
 2021-2023 Quarterly Trending Base Range: UK Residents 18+ (n= 7,366-8,604)  
 Q: Thinking more generally about the vacations that you go on, not just those that you have taken in the last 12 months, which, if any, of the following types of vacations do you typically take? Please select all that apply.

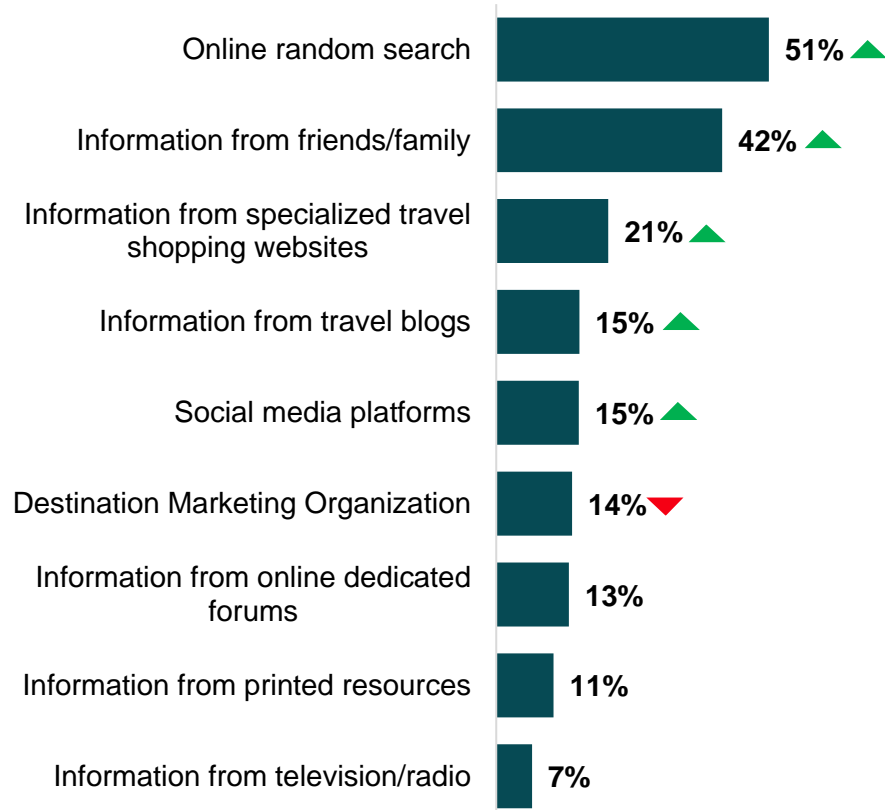


# Vacation Planning Methods

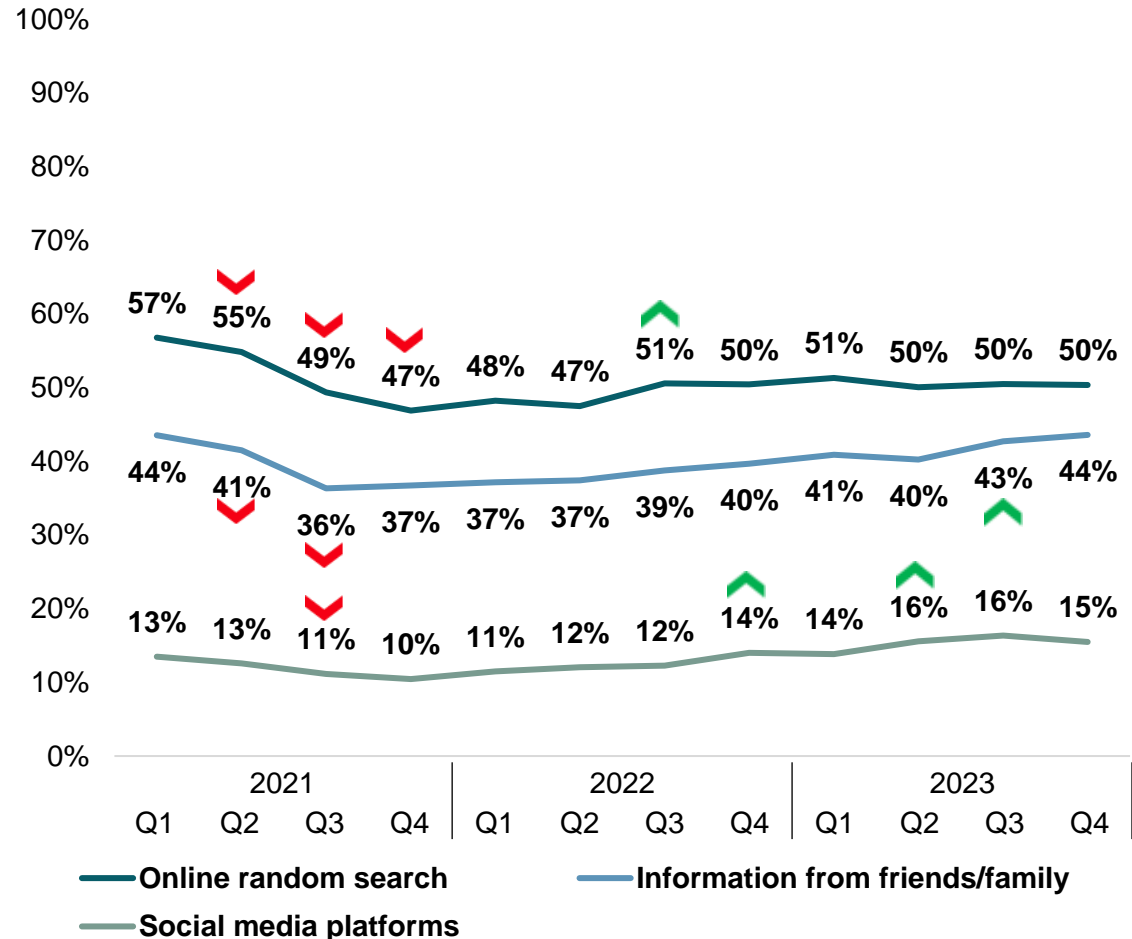


Many vacation planning methods are up year-over-year likely driven by renewed interest in travelling internationally and looking for the best value for money. Social media platforms rank well behind both online random search and information from friends/family

## Vacation Planning Methods



## Select Vacation Planning Methods (Trended)



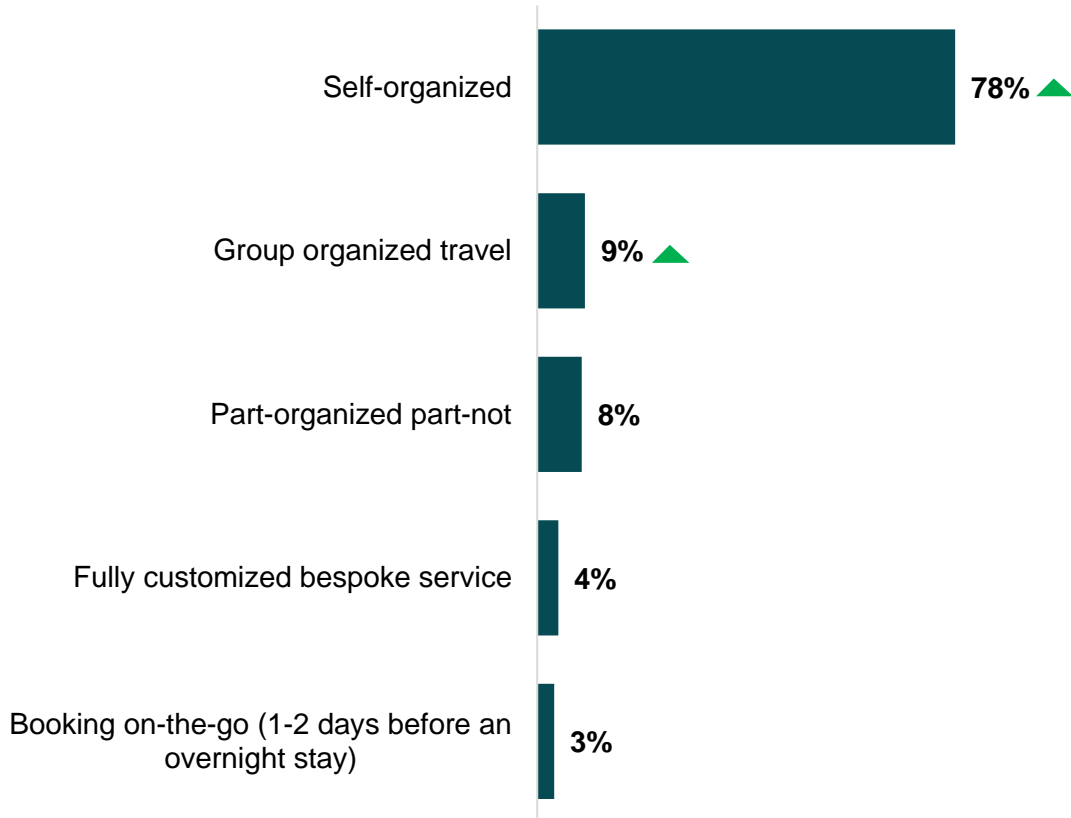


# Vacation Organization Habits

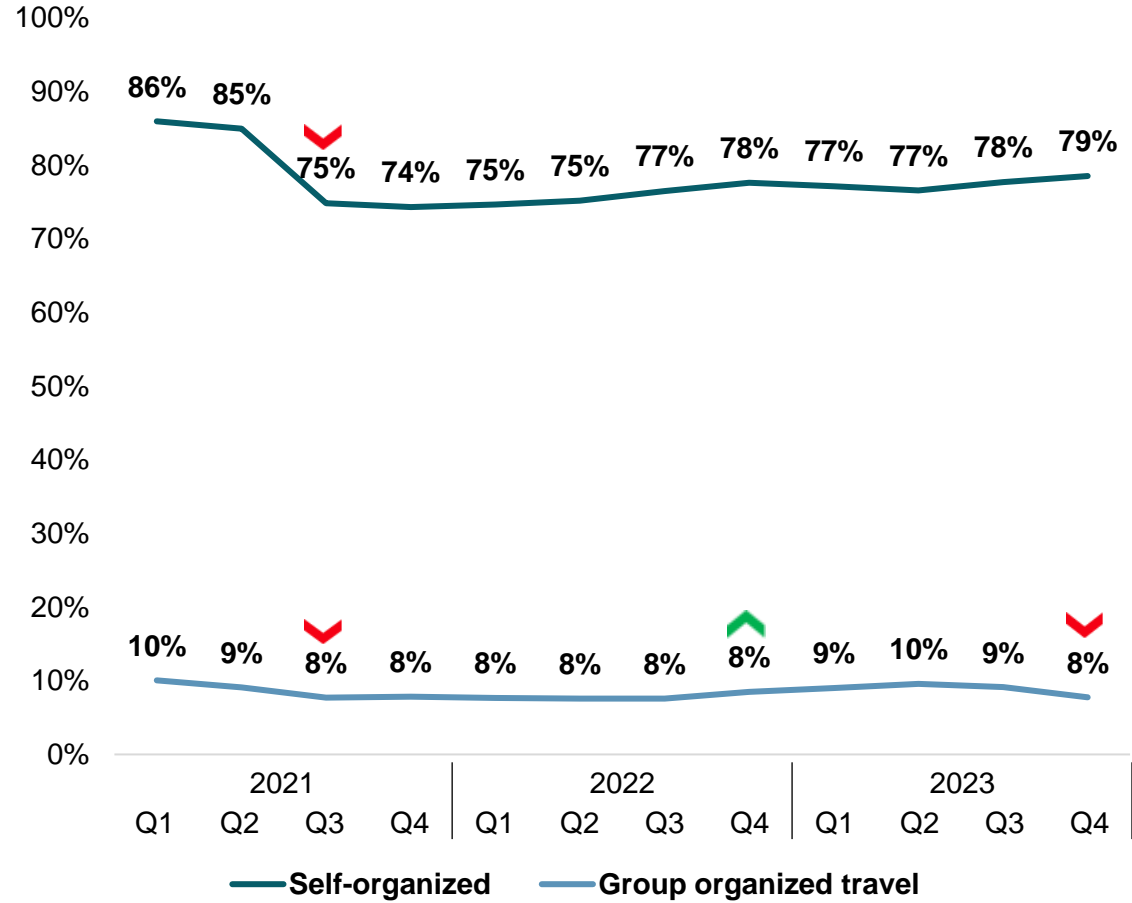


While self-organization has increased since last year and remains the dominant vacation organization method, scores are down compared to early 2021. Group organized travel increased year-over-year, but less than one in ten rely on it

## Vacation Organization Habits



## Select Vacation Organization Habits (Trended)

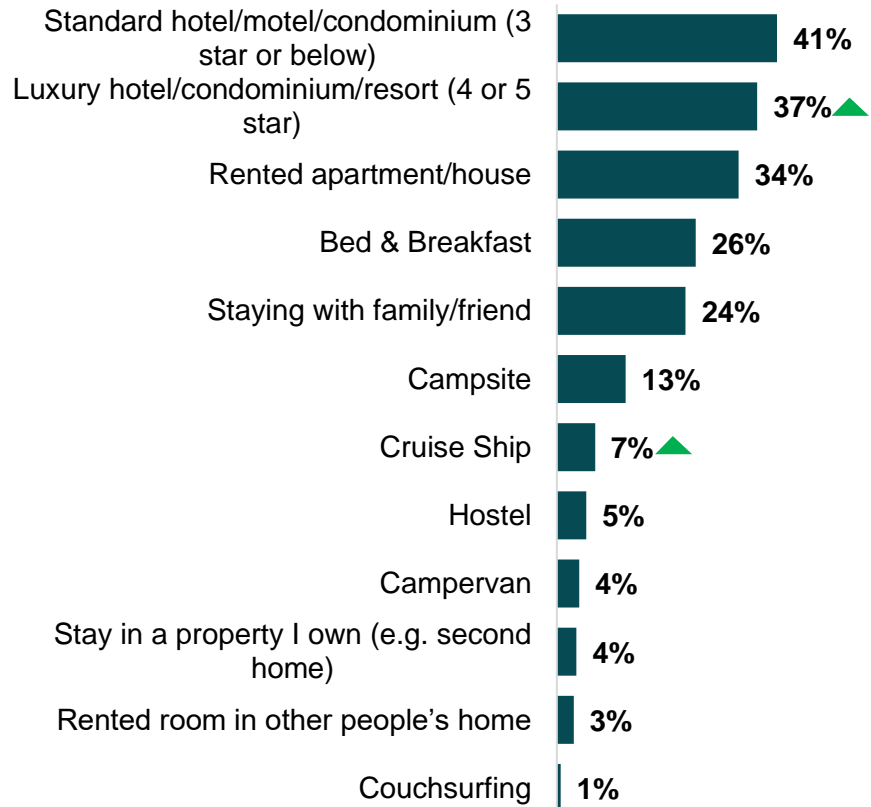


# Accommodation Type Typically Stayed At

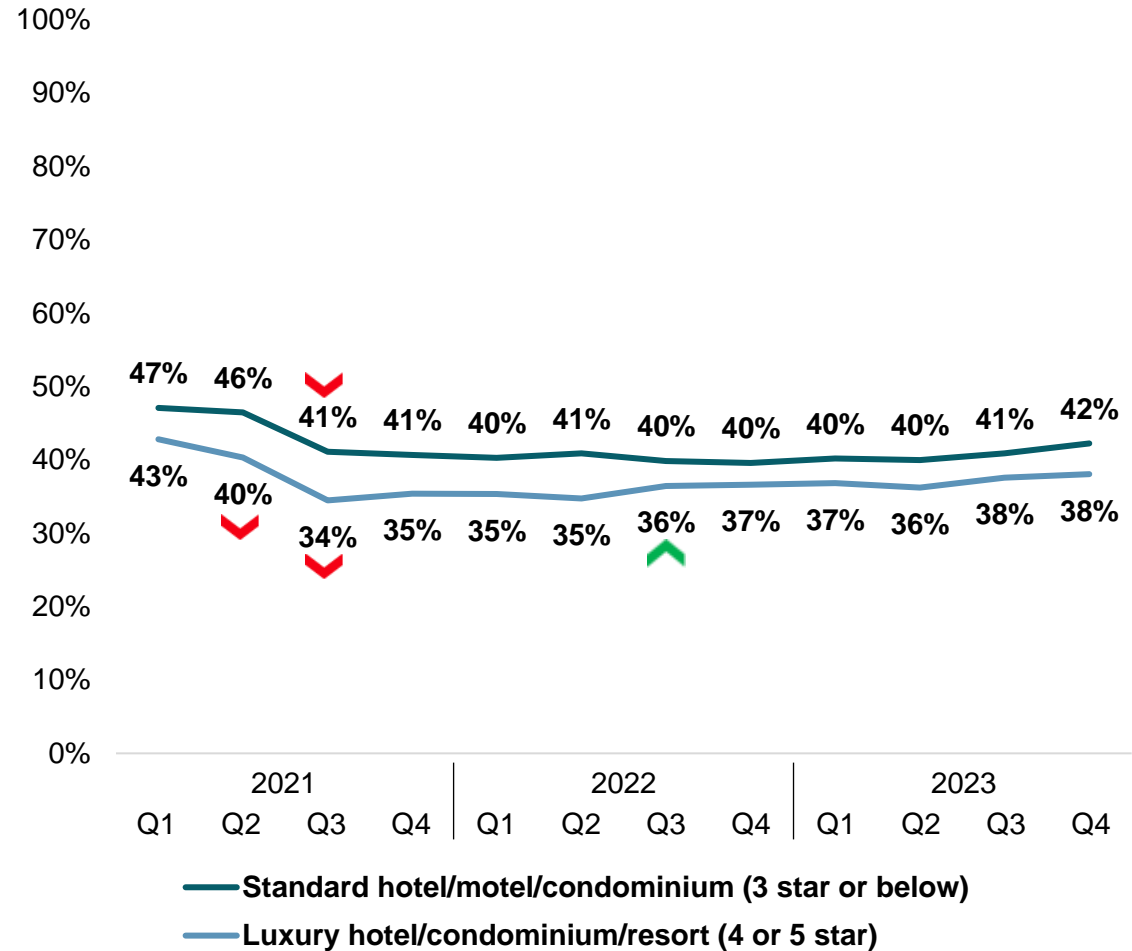


Although the cost of accommodation remains a significant travel obstacle, Brits increasingly mention stays at luxury hotels, indicating a perception that these establishments offer experiences justifying their higher costs

## Accommodation Type Typically Stayed At



## Select Accommodation Types (Trended)



# Accommodation Booking Methods

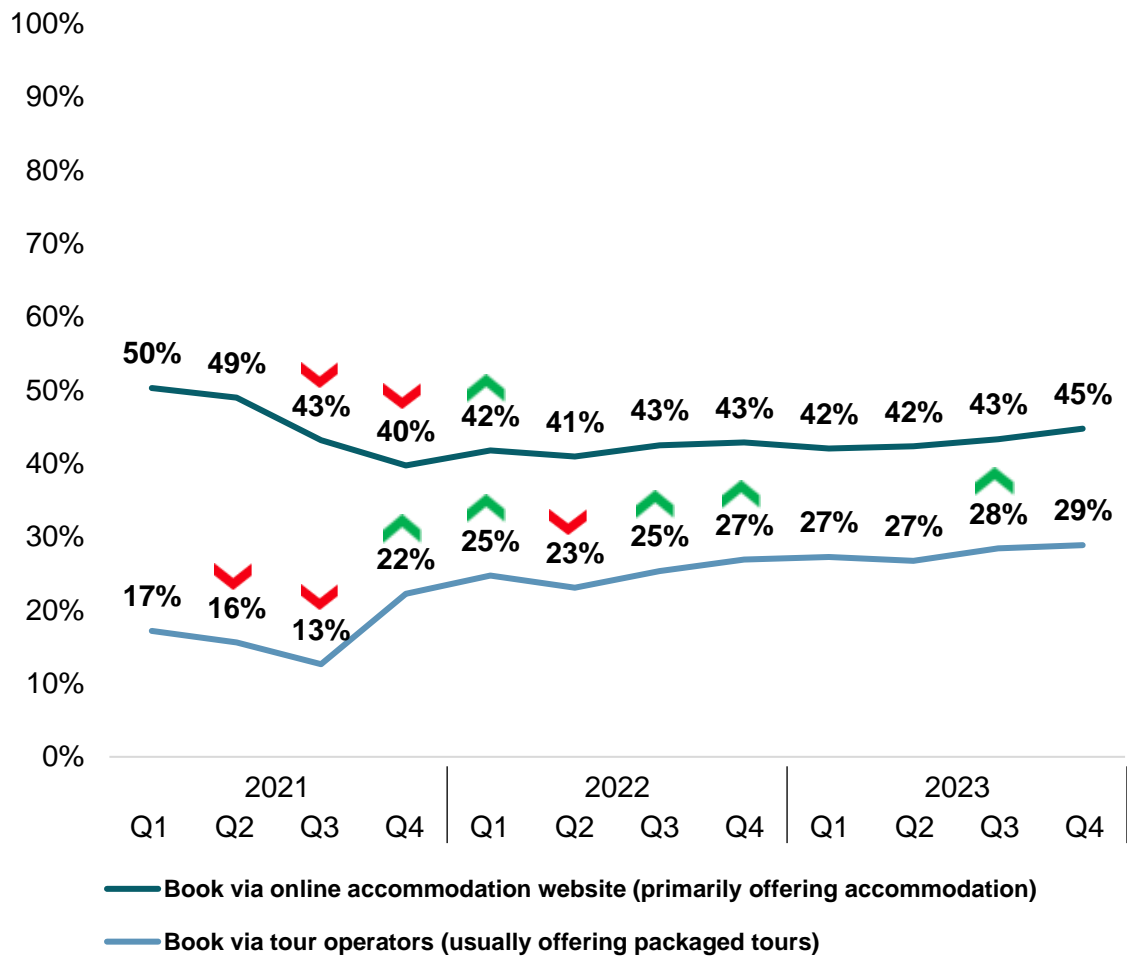


Booking via online accommodation websites and tour operators is up year-over-year

## Accommodation Booking Methods



## Select Accommodation Booking 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 booking methods do you typically use when booking accommodation for vacations?

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



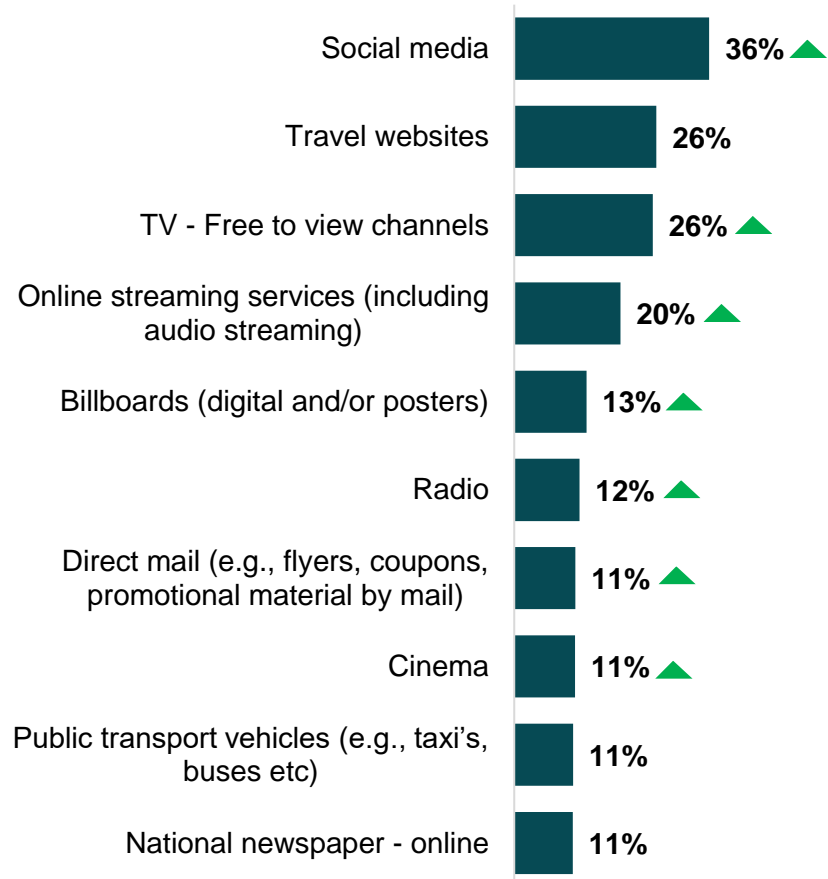


# Effective Types of Travel Advertising

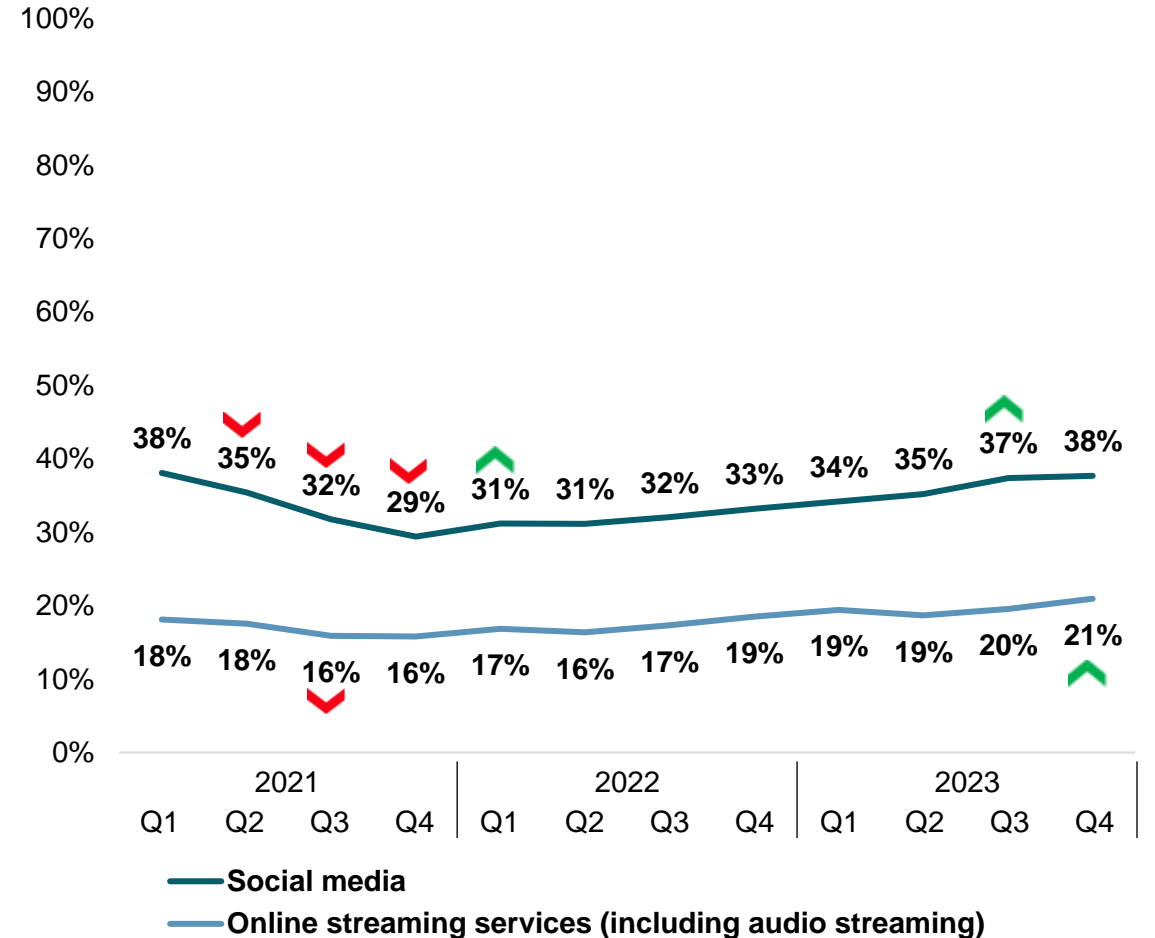


Brits highlight more channels as effective in capturing their interest and engagement.

## 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.





# Performance of Canada in 2023 vs. Competitors



Yellowknife  
Northwest Territories



# Performance Scorecard for Canada

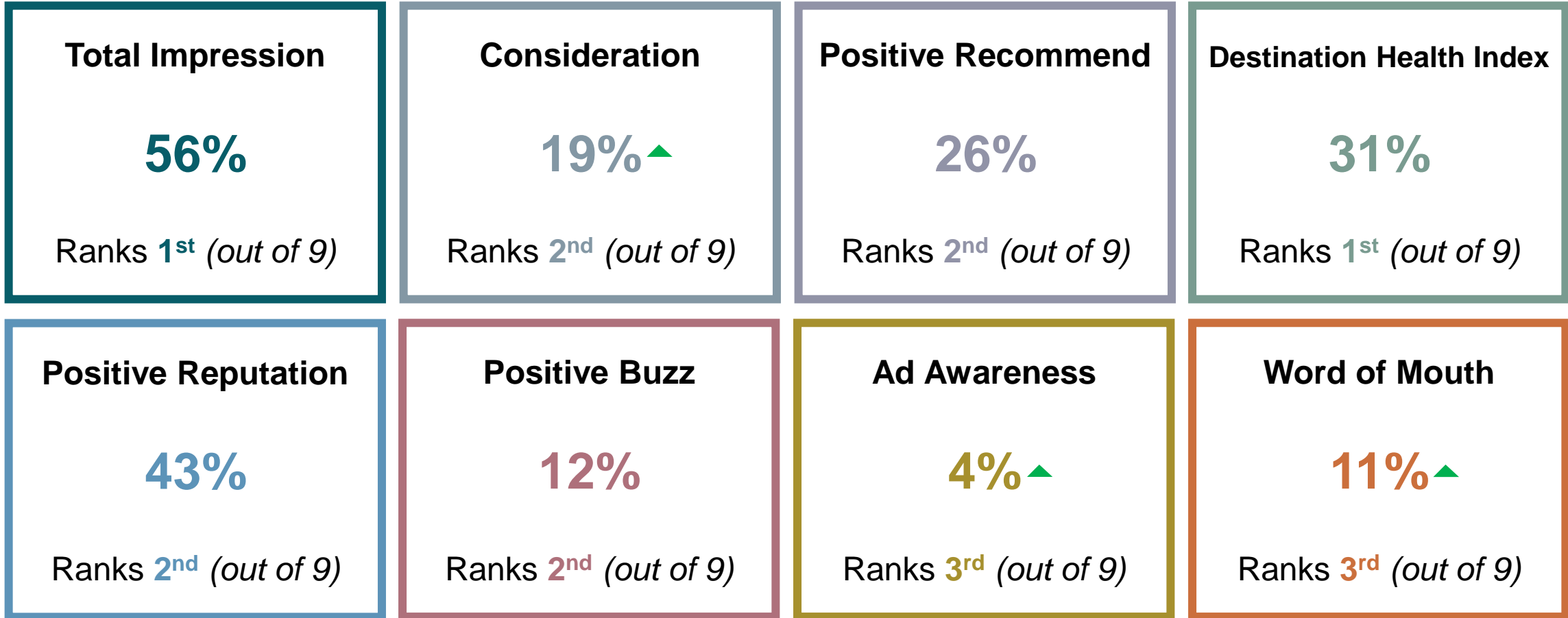


Metric		Definition		Question Text
Total Impression	→	The degree to which consumers feel they know and understand a brand, beyond just being aware of its existence. Total impression = positive + negative impression	→	Overall, of which of the following destinations do you have a POSITIVE impression? / Now which of the following destinations do you have an overall NEGATIVE impression?
Consideration	→	The number of consumers who would consider the destination when they are next in market to plan a vacation.	→	When you are in the market next to plan a vacation or a fun day out for yourself / your family, which destinations would you consider?
Positive Recommend	→	How likely consumers are to recommend a destination to a friend or colleague.	→	Which of the following destinations would you RECOMMEND to a friend or colleague?
Destination Health Index	→	Overall measure of a destination's brand health across several key destination health metrics.	→	Average of Positive Impression, Positive Reputation, Positive Quality, Positive Value, Positive Satisfaction, Positive Recommend
Positive Reputation	→	How much consumers like and respect a destination.	→	Which of the following destinations do you regard as having a GOOD reputation for vacations?
Positive Buzz	→	How much positive news coverage consumers are hearing about a destination.	→	Over the PAST TWO WEEKS, which of the following destinations have you heard something POSITIVE about (whether in the news, through advertising, or talking to friends and family)?
Ad Awareness	→	How much advertising consumers have seen for a destination.	→	Which of the following destinations have you seen an advertisement for in the PAST TWO WEEKS?
Word of Mouth	→	How much consumers are talking about a destination.	→	Which of the following destinations have you talked about with friends and family in the PAST TWO WEEKS (whether in-person, online, or through social media)?

# Performance Scorecard for Canada



Canada performed well in the UK market in 2023, ranking 1<sup>st</sup> (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



# 2023 Annual Scores



Scores increased for Canada and across the competitive set in 2023. Media metrics (positive buzz, ad awareness and word of mouth) and consideration saw most consistent increases, reflecting growing interest in international travel and a more competitive landscape

	Canada	US	Iceland	Japan	Australia	Thailand	Mexico	India	China
Total Impression	56%	52% ▲	48%	43%	53%	32%	31%	33% ▲	43%
Consideration	19% ▲	21%	19% ▲	15% ▲	14%	11% ▲	10%	6% ▲	3% ▲
Positive Recommend	26%	28%	20%	18% ▲	23%	14%	11%	9%	4%
Destination Health Index	31%	28%	25%	22% ▲	29%	19%	14%	10% ▲	4%
Positive Reputation	43%	38%	36%	32% ▲	48%	32%	27%	11%	4%
Positive Buzz	12%	10%	10%	11% ▲	14% ▲	6% ▲	4%	4% ▲	2% ▲
Ad Awareness	4% ▲	11% ▲	4%	3% ▲	8% ▲	2%	2%	1% ▲	1% ▲
Word of Mouth	11% ▲	22% ▲	8% ▲	9% ▲	13% ▲	7% ▲	5%	6% ▲	6% ▼

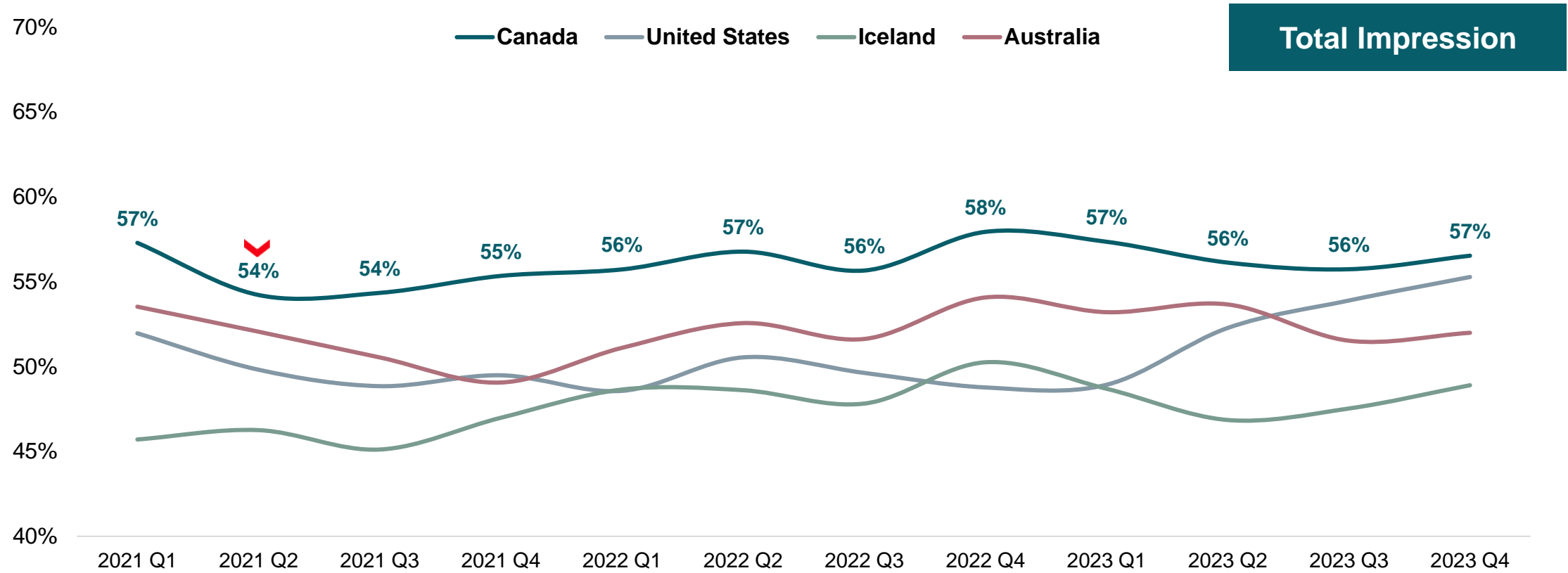




# Total Impression: Positive + Negative Impression (Trended)



Canada continues to lead the competitive set for total impression; however, the US has shown significant growth in 2023, closing in on Canada's score



**Total Impression**

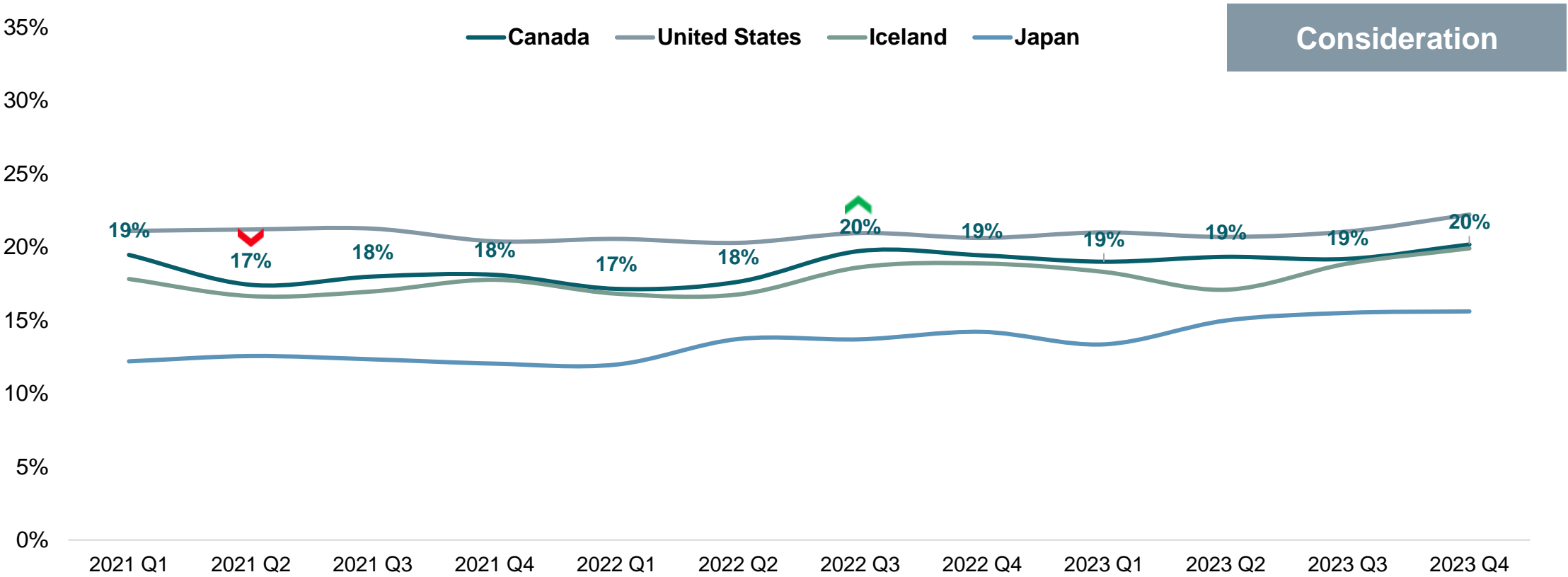
	2021 Q1	2021 Q2	2021 Q3	2021 Q4	2022 Q1	2022 Q2	2022 Q3	2022 Q4	2023 Q1	2023 Q2	2023 Q3	2023 Q4
<b>Canada's Rank</b>	#1	#1	#1	#1	#1	#1	#1	#1	#1	#1	#1	#1
<b>Top Ranked Destination</b>	Canada	Canada	Canada	Canada	Canada	Canada	Canada	Canada	Canada	Canada	Canada	Canada

23 2021-2023 Quarterly Trending Base Range: UK Residents 18+ (n=3,050-5,596)  
 Q: Overall, of which of the following destinations do you have a POSITIVE impression? / Now which of the following destinations do you have an overall NEGATIVE impression?

# Consideration (Trended)



With Canada's year-over-year improvement, it has recovered from losses during the first half of 2022. However, competitors are also seeing year-over-year growth, Canada's plateauing scores may indicate loss of market share



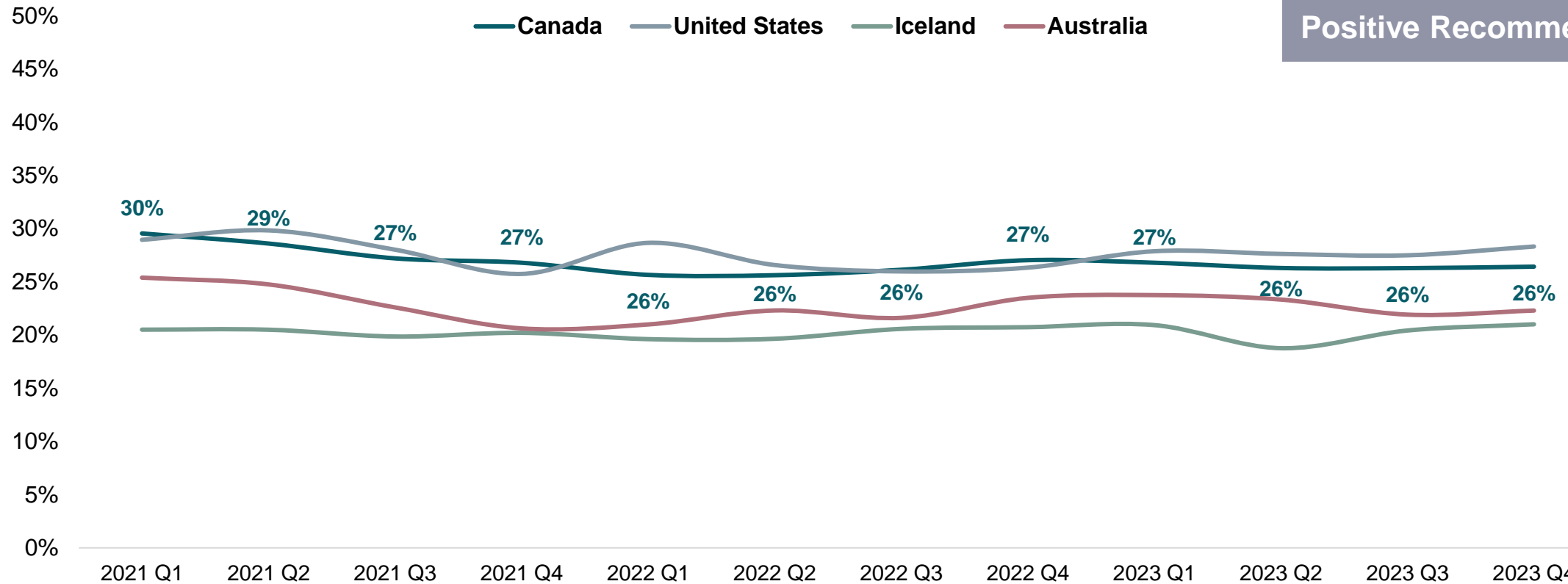
<b>Canada's Rank</b>	#2	#2	#2	#2	#2	#2	#2	#2	#2	#2	#2	#2
<b>Top Ranked Destination</b>	US	US	US	US	US	US	US	US	US	US	US	US

# Positive Recommend (Trended)



While Canada ranks second in positive recommend, scores are near level with those of the US

Positive Recommend

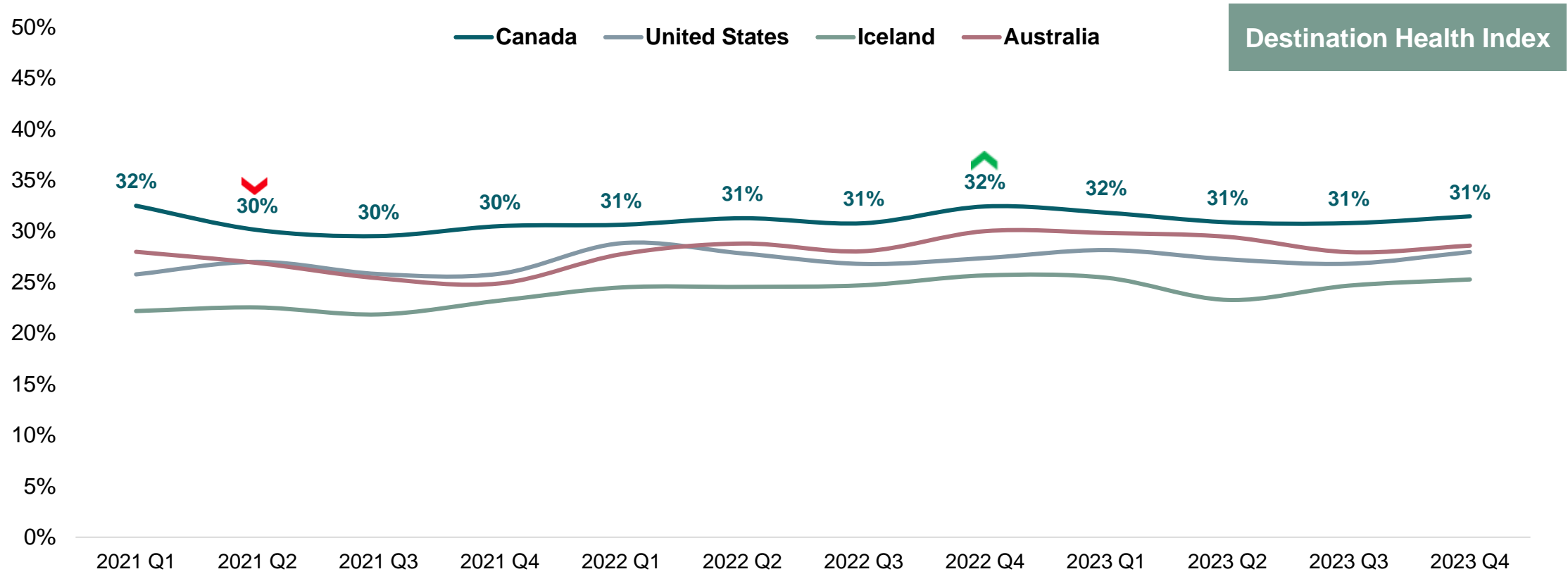


	2021 Q1	2021 Q2	2021 Q3	2021 Q4	2022 Q1	2022 Q2	2022 Q3	2022 Q4	2023 Q1	2023 Q2	2023 Q3	2023 Q4
<b>Canada's Rank</b>	#1	#2	#2	#1	#2	#2	#1	#1	#2	#2	#2	#2
<b>Top Ranked Destination</b>	Canada	US	US	Canada	US	US	Canada	Canada	US	US	US	US

# Destination Health Index (Trended)



Canada remains the top-ranking destination in overall destination health; however, Japan and India saw notable increases in 2023 suggesting emerging competition that could impact consideration for even the highest-scoring destinations

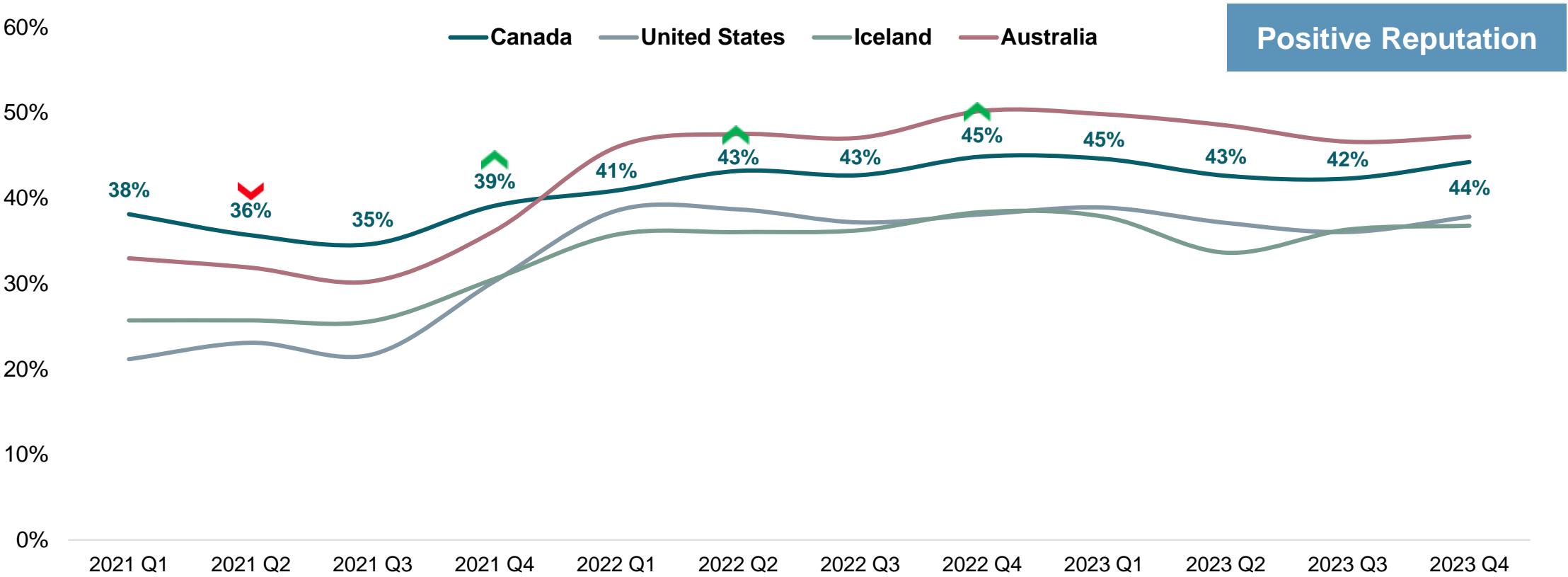


	2021 Q1	2021 Q2	2021 Q3	2021 Q4	2022 Q1	2022 Q2	2022 Q3	2022 Q4	2023 Q1	2023 Q2	2023 Q3	2023 Q4
<b>Canada's Rank</b>	#1	#1	#1	#1	#1	#1	#1	#1	#1	#1	#1	#1
<b>Top Ranked Destination</b>	Canada	Canada	Canada	Canada	Canada	Canada	Canada	Canada	Canada	Canada	Canada	Canada

# Positive Reputation (Trended)



Many destinations experienced significant increases in late 2021 and early 2022 as Canada was overtaken in positive reputation rankings by Australia; Canada failed to regain its top rank as of 2023 Q4



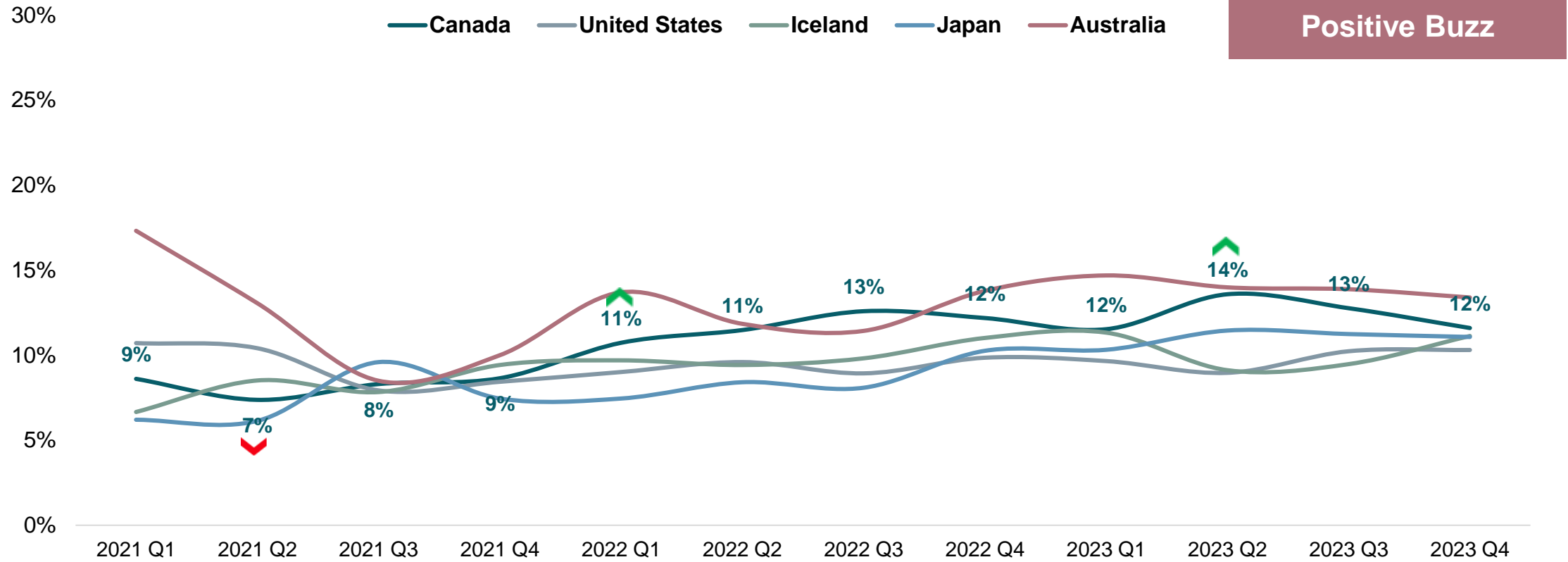
	2021 Q1	2021 Q2	2021 Q3	2021 Q4	2022 Q1	2022 Q2	2022 Q3	2022 Q4	2023 Q1	2023 Q2	2023 Q3	2023 Q4
<b>Canada's Rank</b>	#1	#1	#1	#1	#2	#2	#2	#2	#2	#2	#2	#2
<b>Top Ranked Destination</b>	Canada	Canada	Canada	Canada	Australia	Australia	Australia	Australia	Australia	Australia	Australia	Australia



# Positive Buzz (Trended)



Sentiment towards Canada and other top-ranked destinations is near level, and all except Australia and the US have experienced growth since early 2021



<b>Canada's Rank</b>	#3	#4	#3	#3	#2	#2	#1	#2	#2	#2	#2	#2
<b>Top Ranked Destination</b>	Australia	Australia	Japan	Australia	Australia	Australia	Canada	Australia	Australia	Australia	Australia	Australia

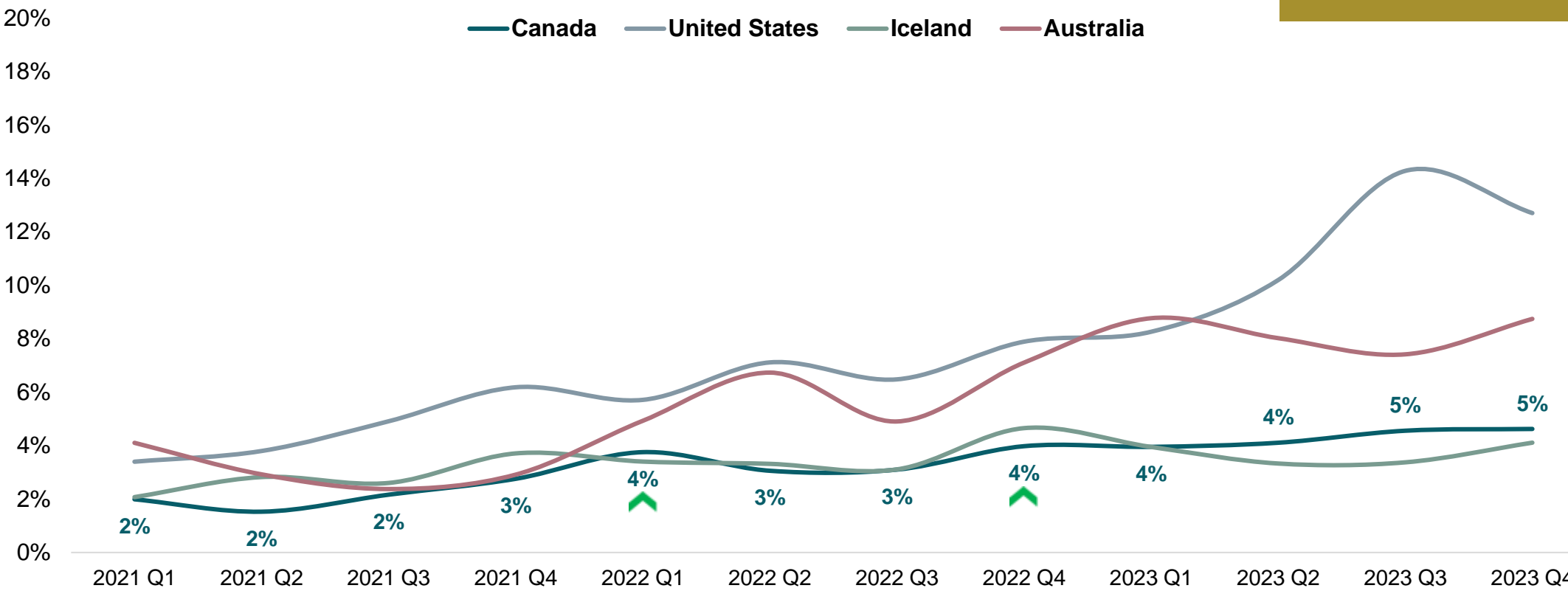
28 2021-2023 Quarterly Trending Base Range: UK Residents 18+ (n=3,050-5,596)  
 Q: Over the PAST TWO WEEKS, which of the following destinations have you heard something POSITIVE about (whether in the news, through advertising, or talking to friends and family)?



# Ad Awareness (Trended)



Media effectiveness has improved for most destinations but particularly for the US whose ad awareness peaked at 13% in 2023 Q3, almost twice that of the next highest competitor for that quarter



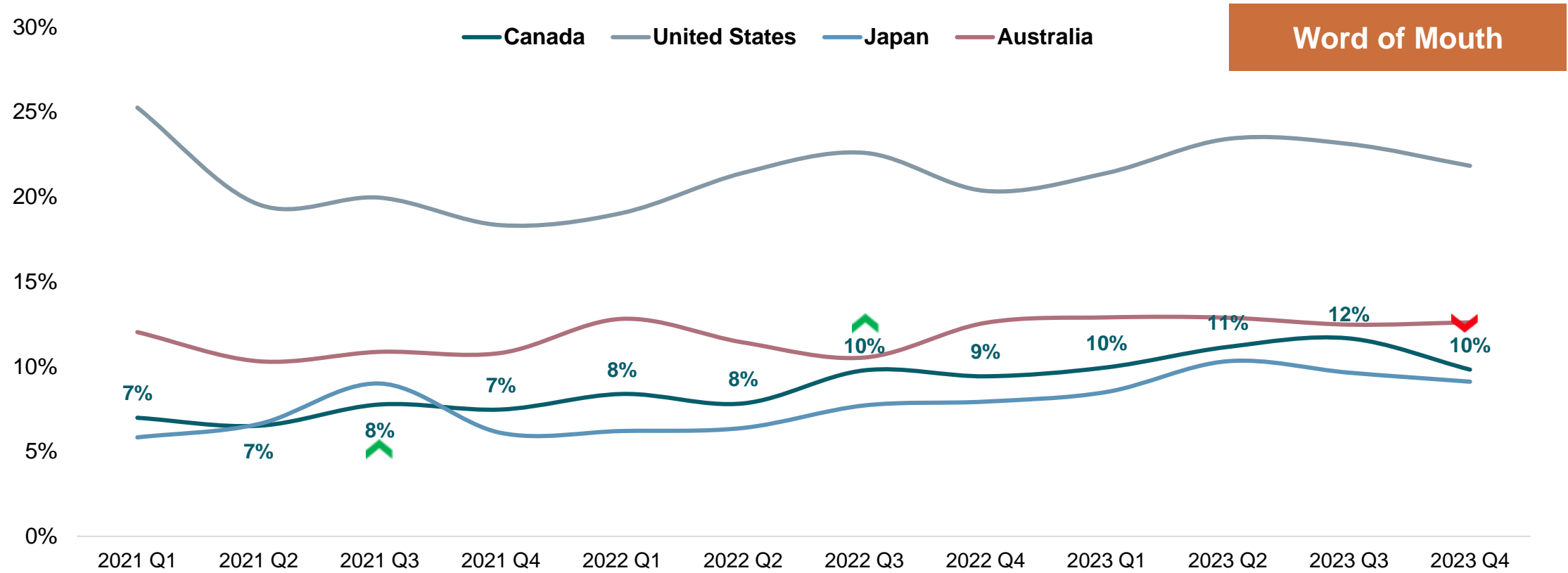
Ad Awareness

	2021 Q1	2021 Q2	2021 Q3	2021 Q4	2022 Q1	2022 Q2	2022 Q3	2022 Q4	2023 Q1	2023 Q2	2023 Q3	2023 Q4
<b>Canada's Rank</b>	#4	#4	#5	#4	#3	#4	#4	#4	#3	#3	#3	#3
<b>Top Ranked Destination</b>	Australia	US	US	US	US	US	US	US	Australia	US	US	US

# Word of Mouth (Trended)



The US continues to lead share of voice by a significant margin, potentially influenced by prevalent US advertising. Scores for Canada tend to be highest in Q3s (July, August, September)



	2021 Q1	2021 Q2	2021 Q3	2021 Q4	2022 Q1	2022 Q2	2022 Q3	2022 Q4	2023 Q1	2023 Q2	2023 Q3	2023 Q4
<b>Canada's Rank</b>	#4	#6	#4	#3	#4	#3	#3	#3	#3	#3	#3	#3
<b>Top Ranked Destination</b>	US	US	US	US	US	US	US	US	US	US	US	US

30 2021-2023 Quarterly Trending Base Range: UK Residents 18+ (n=3,050-5,596)  
 Q: Which of the following destinations have you talked about with friends and family in the PAST TWO WEEKS (whether in-person, online, or through social media)?

# THANK YOU

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



CANADIAN TOURISM DATA  
**collective**