

# 2023 GLOBAL TRAVELLER RESEARCH PROGRAM

## UNITED KINGDOM HIGHLIGHTS REPORT



Canada



St. John's

Newfoundland & Labrador



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# STUDY OVERVIEW: UNITED KINGDOM MARKET

## Target Population

The target population are residents who are aged 18 years or more, who have taken a long-haul pleasure holiday and stayed at least four nights in a paid accommodation in the last three years or are thinking about doing so in the next two years.

## Timing of fieldwork

December 4<sup>th</sup>-15<sup>th</sup> 2023

## Geographical Definition for Qualified Trips

Qualified trips refer to trips taken outside of Europe, North Africa and the Mediterranean

## To note:

In 2023, DC switched research providers to YouGov Canada, with the research program evolving from the previous Global Travel Watch (GTW) to the new Global Traveller Research Program (GTRP). The project has also been migrated over to YouGov's proprietary panel. As a result, no trending is available for the UK market.

# Key Insights



**Unaided consideration for Canada is nearly equivalent to that for Australia, with both trailing behind the US distantly. Next 2-year immediate potential for Canada is projected to be 4.2M**



**Summer is the peak tourism season for UK visitors to Canada**



**Nature-centered holidays prevail, with food activities gaining the most popularity**



**The majority of recent travellers to Canada were accompanied by a partner, or children under 18**



**Prospective travellers to Canada are intrigued by Indigenous cultural activities, such as experiencing Indigenous cuisine, adventures, and cultural sites**

# MARKET SIZING



Kyle  
Saskatchewan



# LONG-HAUL PLEASURE TRAVELLER SIZING

Total population aged 18 years or more<sup>1</sup>

**52,156,500**

X

**Incidence rate:** Long-haul pleasure travellers who have taken a trip in the past 3 years or plan to in the next 2 years<sup>2</sup>

**30.6%**

=



**Size of the Long-haul Pleasure Traveller Population**

**15,960,000**

**This study was conducted among long-haul pleasure travellers, represented by 16.0 million Brits aged 18 years or more.**



Essipit  
Québec

<sup>1</sup> Source: Estimates 2022 mid-year estimates, Welsh Government National Statistics  
<sup>2</sup> Note: Results are from 2023 YouGov Canada Omnibus Survey  
Base: General population aged 18+ (n=2244)

# SIZE OF THE POTENTIAL MARKET TO CANADA (NEXT 2 YEARS)



Total potential long-haul pleasure travellers aged 18 years or more

**15,960,000**

X

## Target Market for Canada

Those in the dream to purchase stages of the path to purchase for Canada

**73.9%**

=



Size of the target market

**11,794,500**

X

## Immediate Potential for Canada

Will definitely/very likely visit Canada in the next 2 years<sup>1</sup>

**35.2%**

=



**Immediate potential**

**4,151,500**

7 to purchase stages for P2P for Canada (n=1133)  
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) Realistically, how likely are you to take a holiday trip to Canada in the **next 2 years**? (Select one)  
<sup>1</sup>Includes respondents likely to visit Canada for a trip of 1 to 3 nights, or a trip of 4 nights or more  
Base: Target market for Canada = long-haul pleasure travellers (past 3 years or next 2 years) (n=1532); Immediate potential for Canada = dream

The next 2-year immediate potential for Canada is 4.2 million long-haul pleasure travellers.

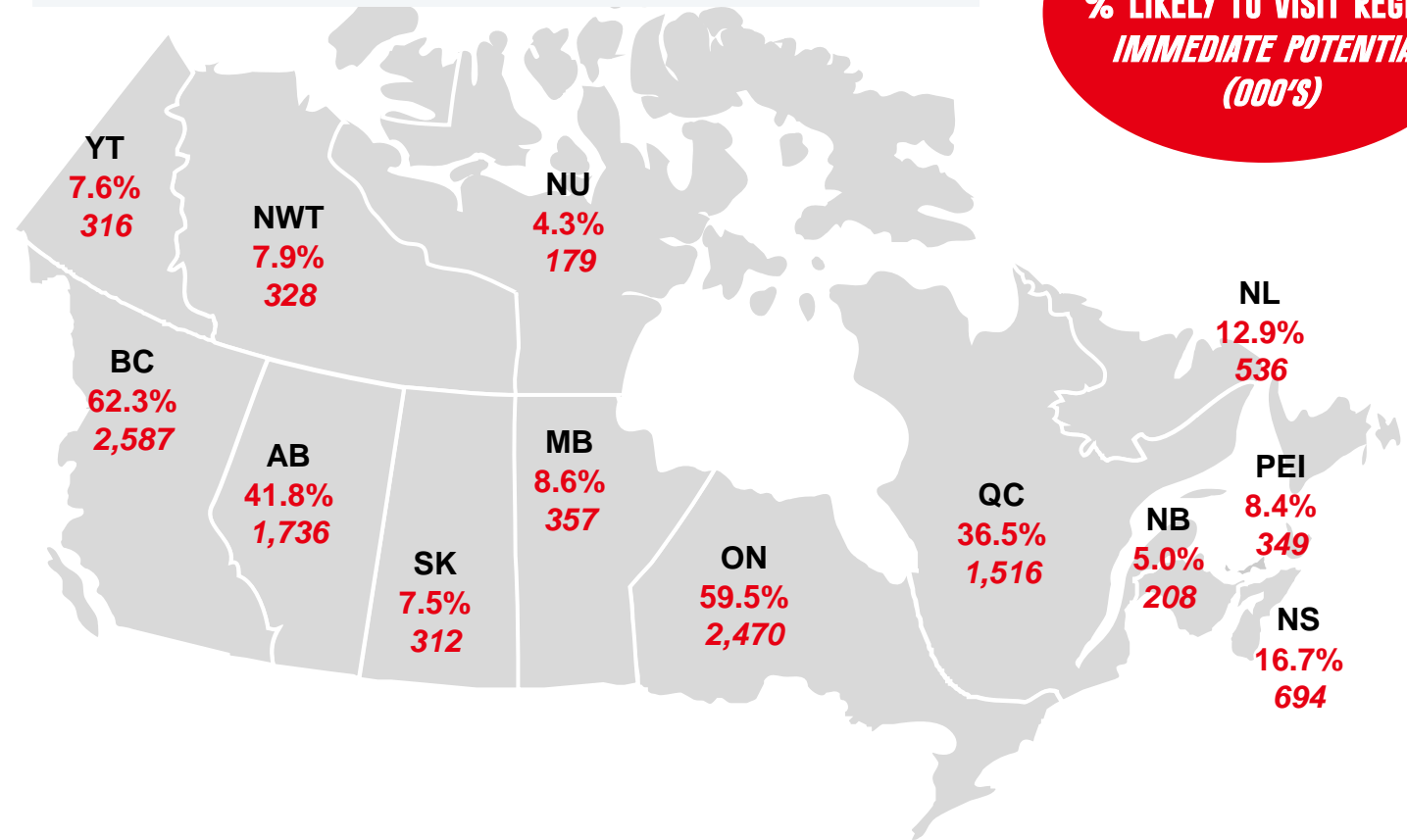


# POTENTIAL MARKET SIZE FOR THE REGIONS

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

IMMEDIATE POTENTIAL FOR CANADA: 4,151,500

**KEY**  
% LIKELY TO VISIT REGION  
IMMEDIATE POTENTIAL  
(000'S)



Base: Those in the dream to purchase stages of the path to purchase for Canada and definitely/very likely to take a trip to Canada (n=1133)  
If you were to take a holiday trip to Canada, in the next 2 years, which of the following Canadian provinces or territories are you likely to visit? (Select all that apply)

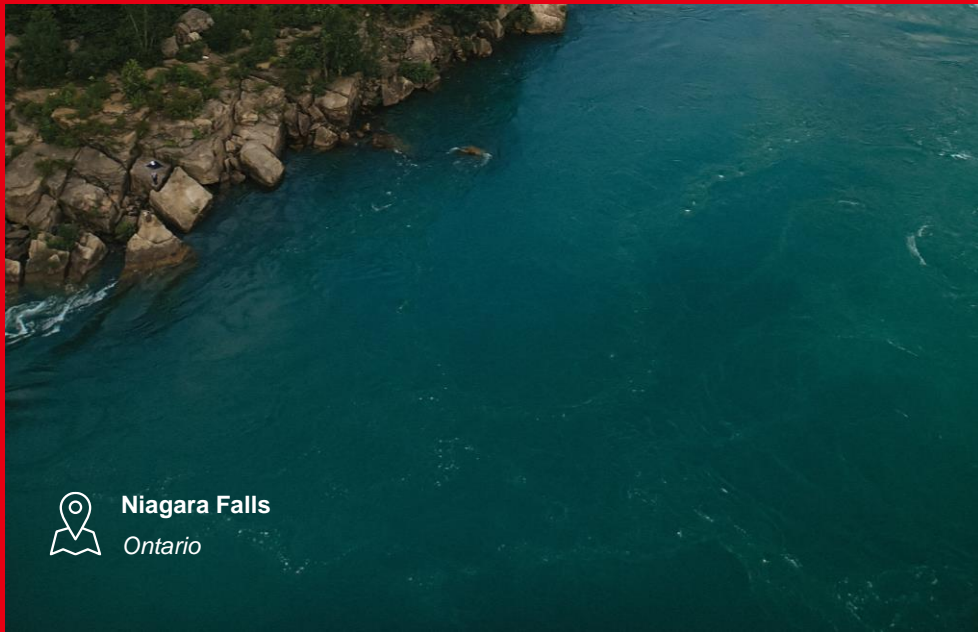




# TRAVEL DESTINATIONS LIKELY TO VISIT (NEXT 2 YEARS)



Popular travel destinations include Vancouver, Niagara Falls, Toronto, and the Rocky Mountains.



Niagara Falls  
Ontario

British Columbia	
Vancouver	45%
Rocky Mountains	37%
Whistler	19%
Victoria	18%
Okanagan	4%
Other – BC	5%

Ontario	
Niagara Falls	44%
Toronto	43%
Ottawa	21%
Muskoka	3%
Other – ON	4%

Alberta	
Rocky Mountains	27%
Calgary	22%
Banff	21%
Jasper	14%
Edmonton	10%
Other – AB	2%

Québec	
Montréal	28%
Québec City	23%
Mont Tremblant	6%
Other – QC	3%

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)  
Within [PROVINCE], which travel destinations are you likely to visit? (Select all that apply)

# TRAVEL DESTINATIONS LIKELY TO VISIT (NEXT 2 YEARS) (CONTINUED)

Saskatchewan	
Saskatoon	3%
Regina	2%
Other – SK	1%

Manitoba	
Churchill	4%
Winnipeg	4%
Other – MB	1%

New Brunswick	
Fredericton	2%
Saint John	2%
Other – NB	1%

Nova Scotia	
Halifax	10%
Cape Breton	6%
Other – NS	3%

Prince Edward Island	
Charlottetown	5%
Other – PEI	2%

Newfoundland & Labrador	
St. John's	8%
Other – NL	5%

Yukon	
Dawson City	3%
Whitehorse	3%
Other – YT	1%

Northwest Territories	
Yellowknife	4%
Inuvik	2%
Other – NWT	2%

Nunavut	
Iqaluit	2%
Other – NU	1%



**One in ten say they are very likely to visit Halifax.**



# TIME OF YEAR INTERESTED IN TAKING A TRIP TO CANADA (NEXT 2 YEARS)

Province/Territory	Winter (Dec, Jan, Feb)	Spring (Mar, Apr, May)	Summer (Jun, Jul, Aug)	Fall (Sept, Oct, Nov)
British Columbia	6%	20%	27%	24%
Alberta	5%	13%	16%	15%
Saskatchewan	1%	2%	3%	2%
Manitoba	1%	3%	4%	3%
Ontario	6%	17%	27%	21%
Québec	4%	11%	15%	13%
New Brunswick	1%	2%	2%	2%
Nova Scotia	1%	4%	7%	6%
Prince Edward Island	1%	2%	3%	3%
Newfoundland & Labrador	1%	4%	6%	5%
Yukon	1%	3%	4%	2%
Northwest Territories	1%	2%	4%	3%
Nunavut	1%	1%	2%	1%



**Potential travellers to Canada are most likely to visit during the summer months. There is also some interest to visit in the fall months.**





Peggy's Cove  
Nova Scotia



CANADIAN TOURISM DATA  
collective



DESTINATION  
CANADA

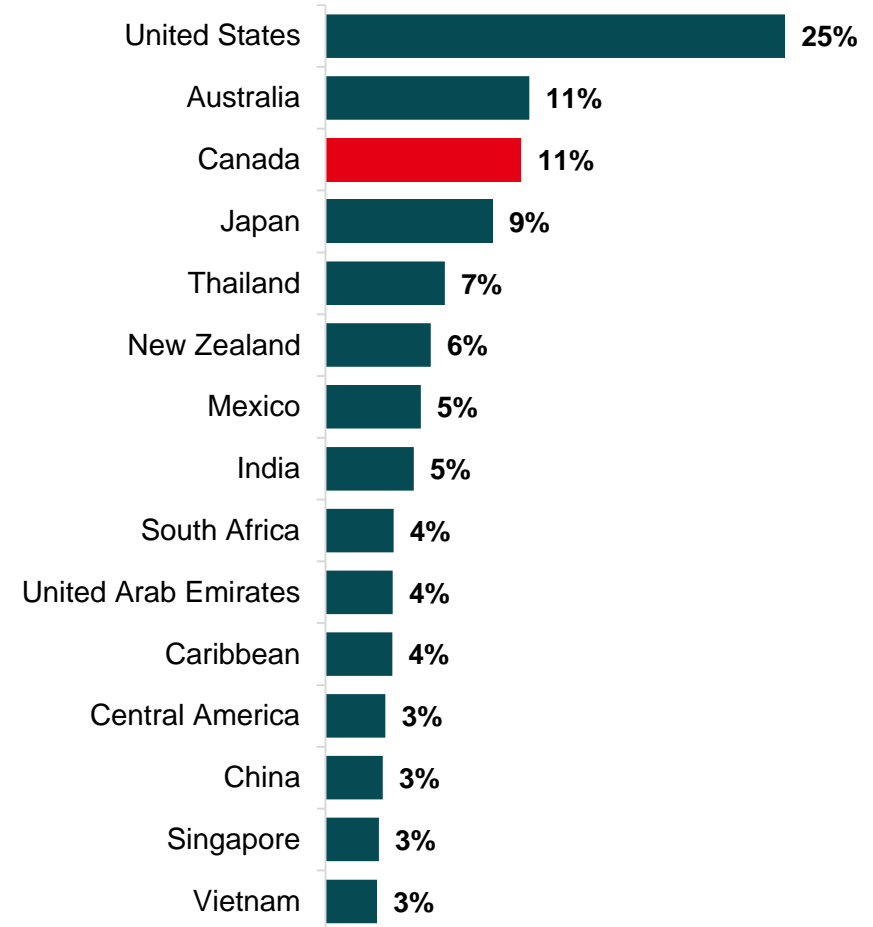
# CONSIDERING CANADA AS A TRAVEL DESTINATION

United Kingdom GTRP – December 2023



# UNAIDED DESTINATION CONSIDERATION (NEXT 2 YEARS)<sup>1</sup>

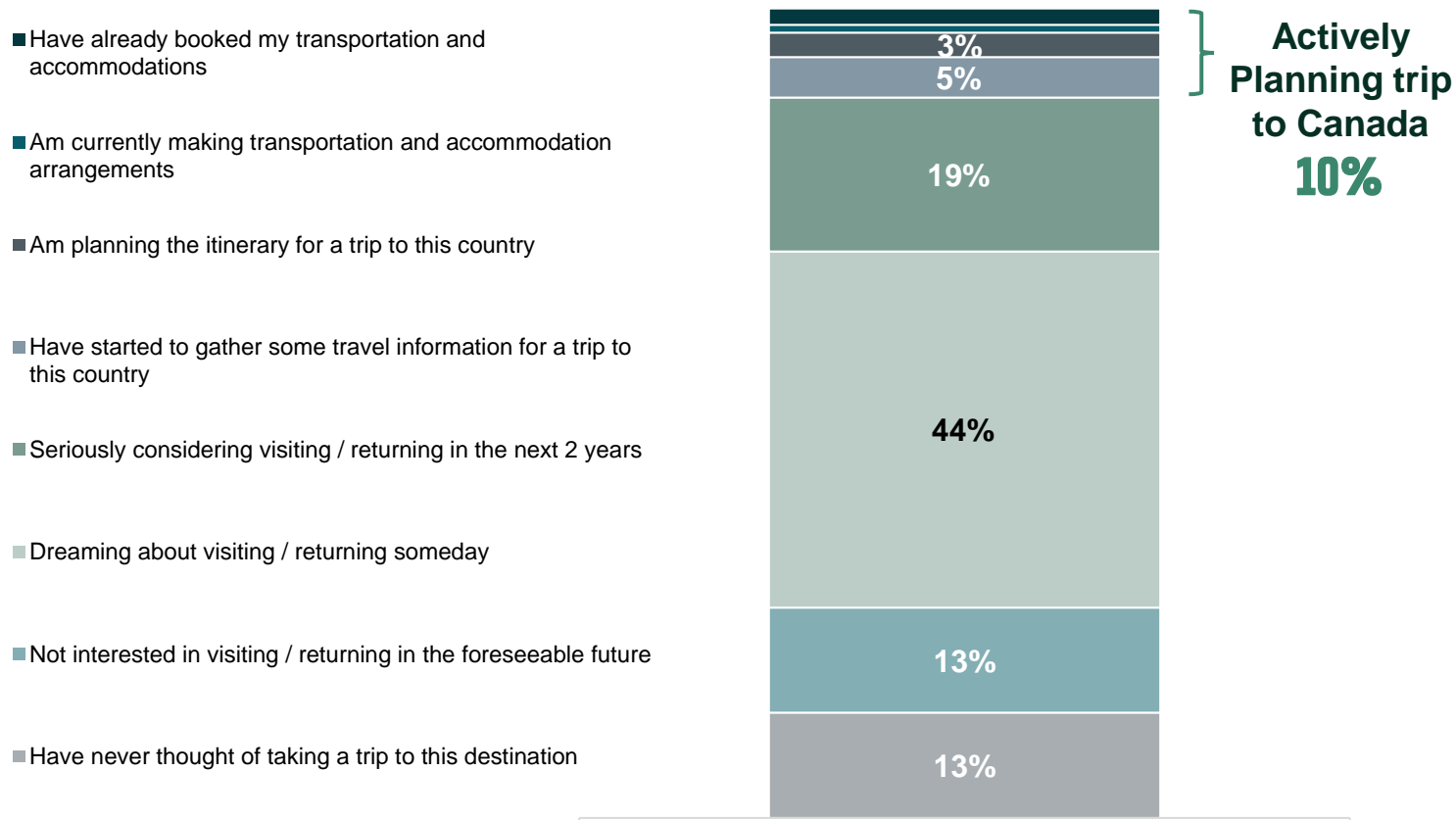
Canada is tied for second with Australia for unaided destination consideration, only behind the United States.



Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=1532)  
 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)  
<sup>1</sup>Note: Roll-up of brand mentions by country (e.g., percentage who said "Canada" or any destination in Canada).



# STAGE IN THE PURCHASE CYCLE FOR CANADA



**Ten percent of UK travellers are actively planning a trip to Canada.**



# TRAVEL BEHAVIOURS



Whitehorse  
Yukon



# TOP 10 GENERAL ACTIVITIES INTERESTED IN

**76%**

Trying Local Food and Drink

**73%**

Natural Attractions

**66%**

Local Markets

**64%**

Nature Walks

**60%**

Oceanside Beaches

**59%**

Historical, Archaeological or World Heritage Sites

**57%**

Viewing Wildlife or Marine Life

**57%**

Northern Lights

**55%**

Nature Parks

**51%**

City Green Spaces

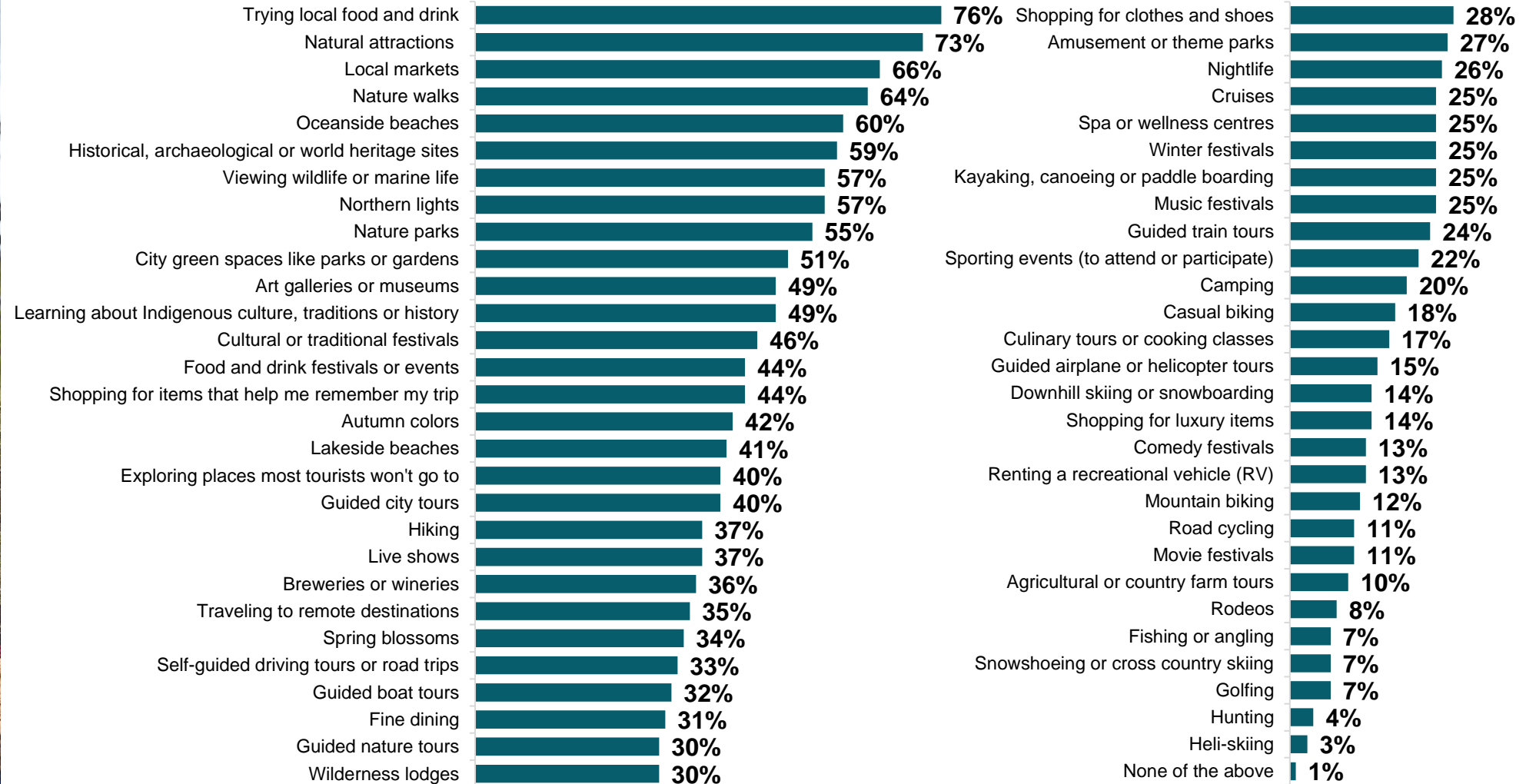


**UK travellers are particularly interested in trying local food and visiting natural attractions.**





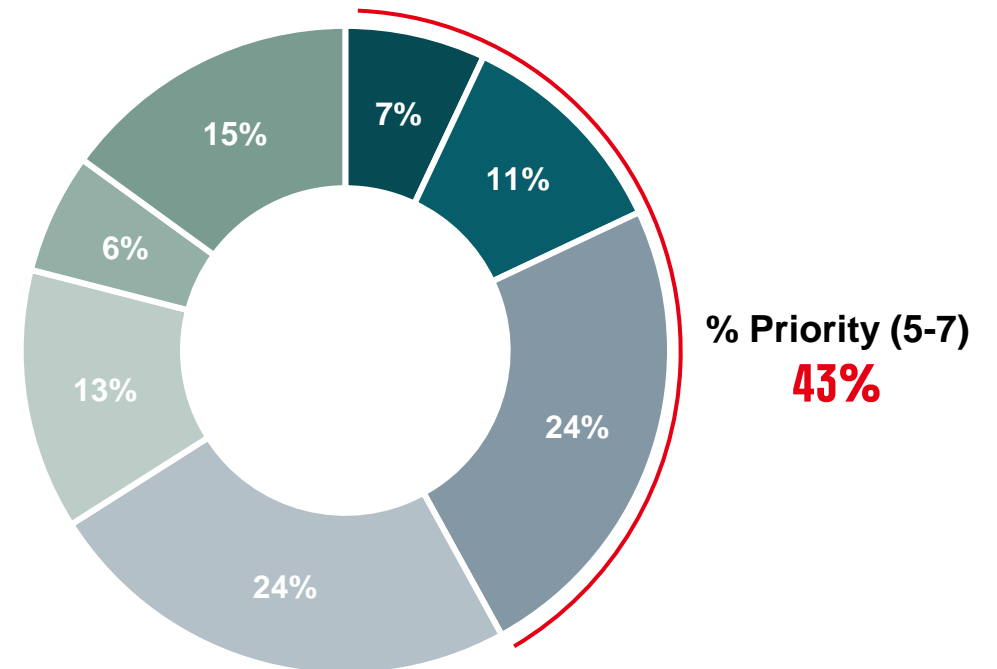
# GENERAL ACTIVITIES INTERESTED IN (FULL LIST)



Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=1532)  
In general, what activities or places are you interested in while on holiday? (Select all that apply)



# PRIORITY OF SUSTAINABLE TRAVEL WHEN PLANNING A TRIP



■ 7 - Essential priority ■ 6 ■ 5 ■ 4 ■ 3 ■ 2 ■ 1 - Not a priority

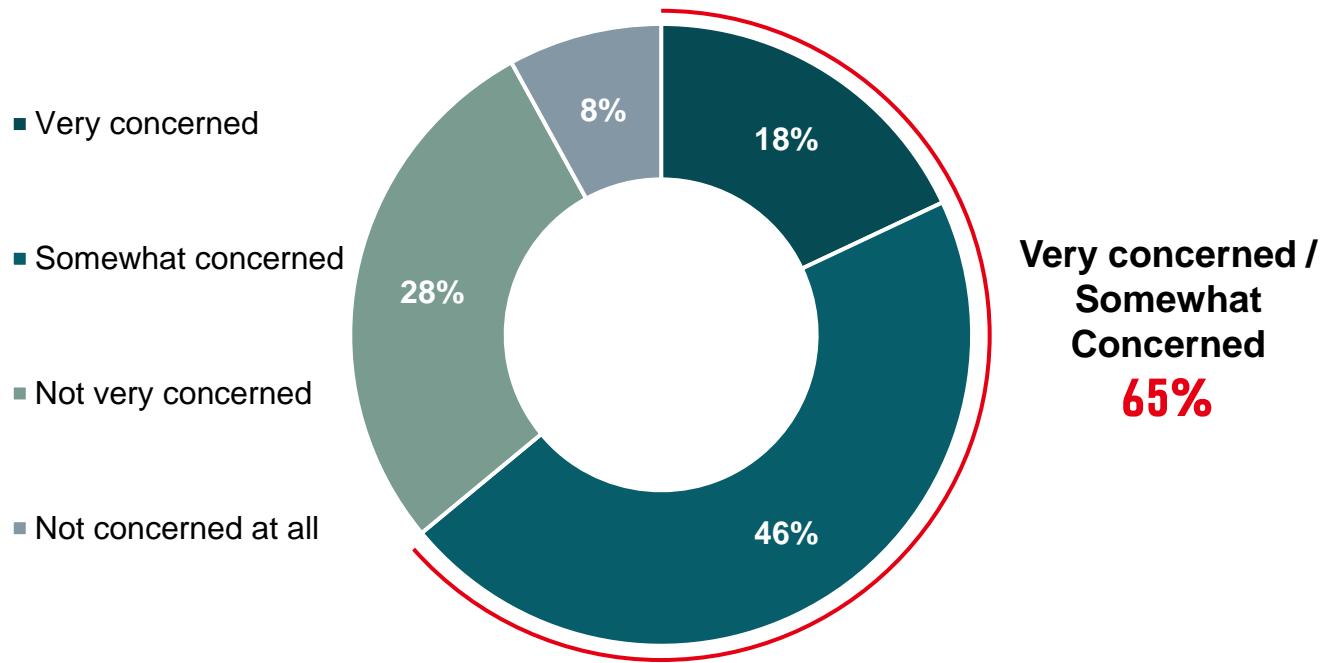
Over four in ten respondents consider sustainable travel to be a priority during trip planning.



Nahanni  
Northwest Territories

Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=1532)  
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'.  
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

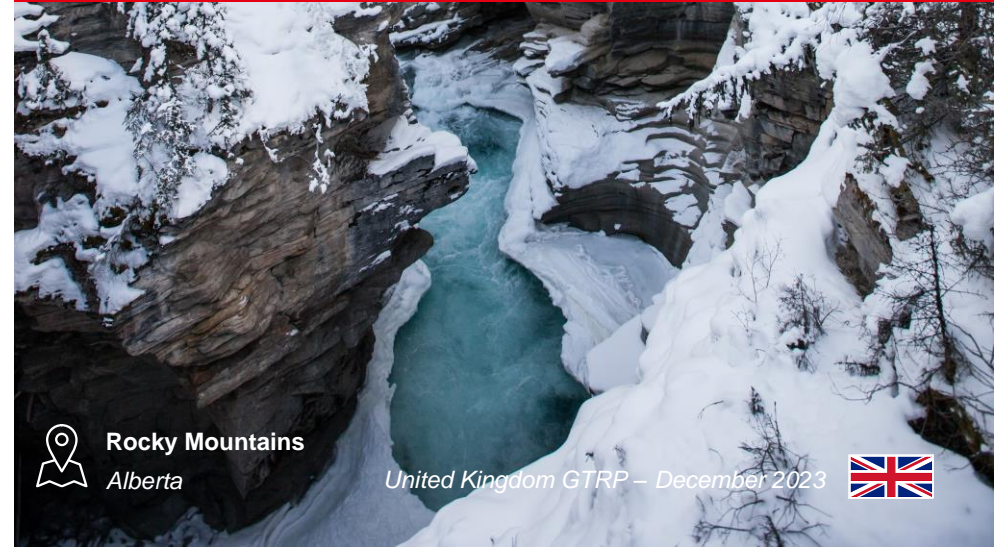


**12%** Changed/Cancelled plans in the past 3 years due to extreme weather events

Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=771)  
 How concerned are you about extreme weather events affecting your travel plans?  
 In the past 3 years, have you ever had to change plans or cancel a trip due to extreme weather events?  
 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.



**Two-thirds of UK travellers are concerned about extreme weather, but only one in ten have changed their plans in the past three years due to extreme weather.**



# INDIGENOUS TOURISM ACTIVITIES



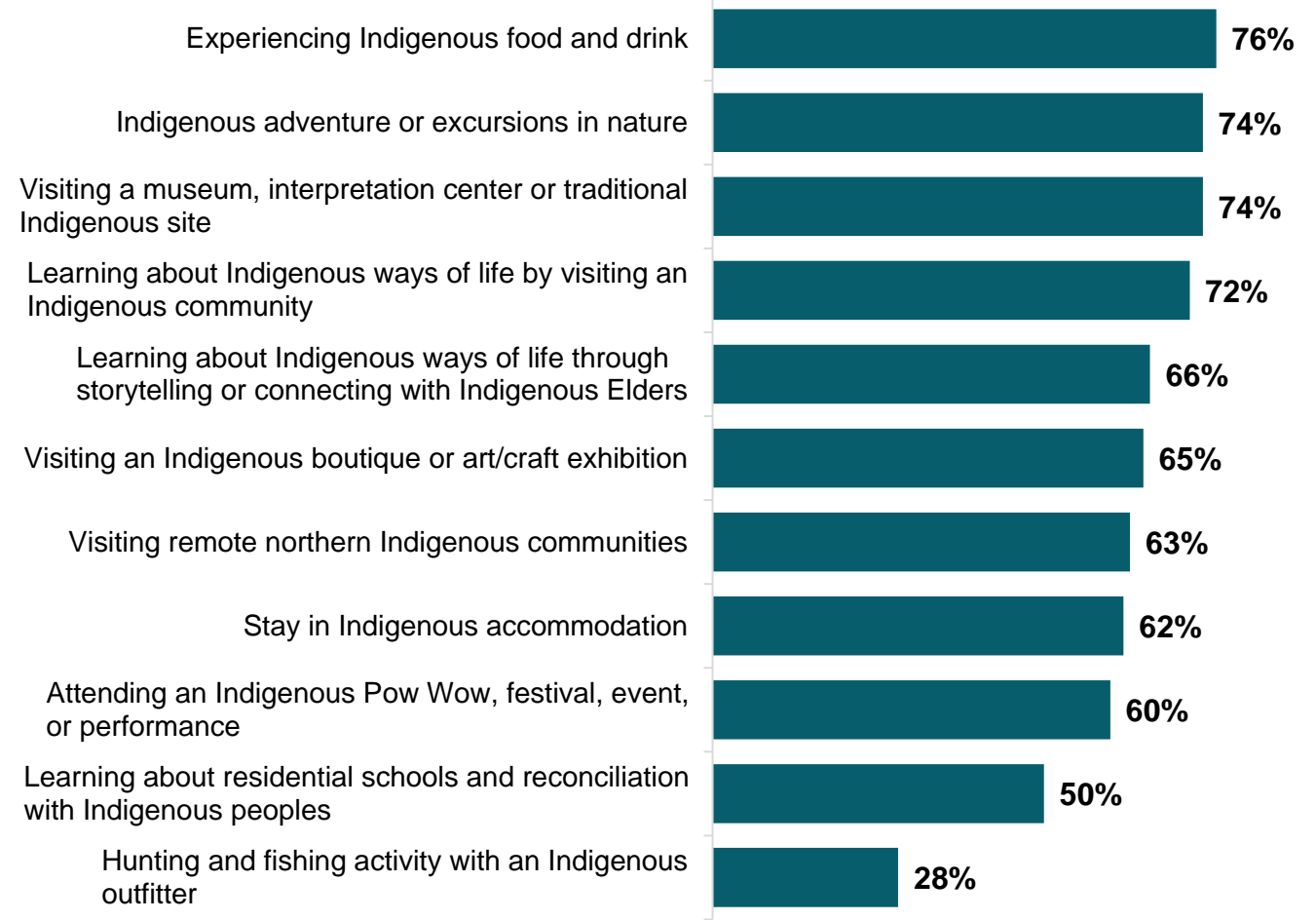
North Vancouver  
British Columbia



# INTEREST IN INDIGENOUS CULTURAL & TOURISM ACTIVITIES

Potential travellers to Canada are interested in Indigenous cultural activities with around three out of four expressing interest in experiencing Indigenous food, adventures, and cultural sites.

% Somewhat/Very Interested



Uclulet  
British Columbia

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

# TRIP TO CANADA IN THE PAST 3 YEARS



Jasper  
Alberta



# TOP 10 ACTIVITIES PARTICIPATED IN DURING PAST 3 YEAR TRIP TO CANADA

Visiting natural attractions and trying local food were the most popular activities among travellers to Canada in the past 3 years.

**53%**

Natural Attractions

**38%**

Nature Parks

**51%**

Trying Local Food and Drink

**35%**

Shopping for Items to Remember My Trip

**47%**

Nature Walks

**33%**

Art Galleries or Museums

**41%**

City Green Spaces

**29%**

Hiking

**38%**

Local Markets

**29%**

Viewing Wildlife or Marine Life

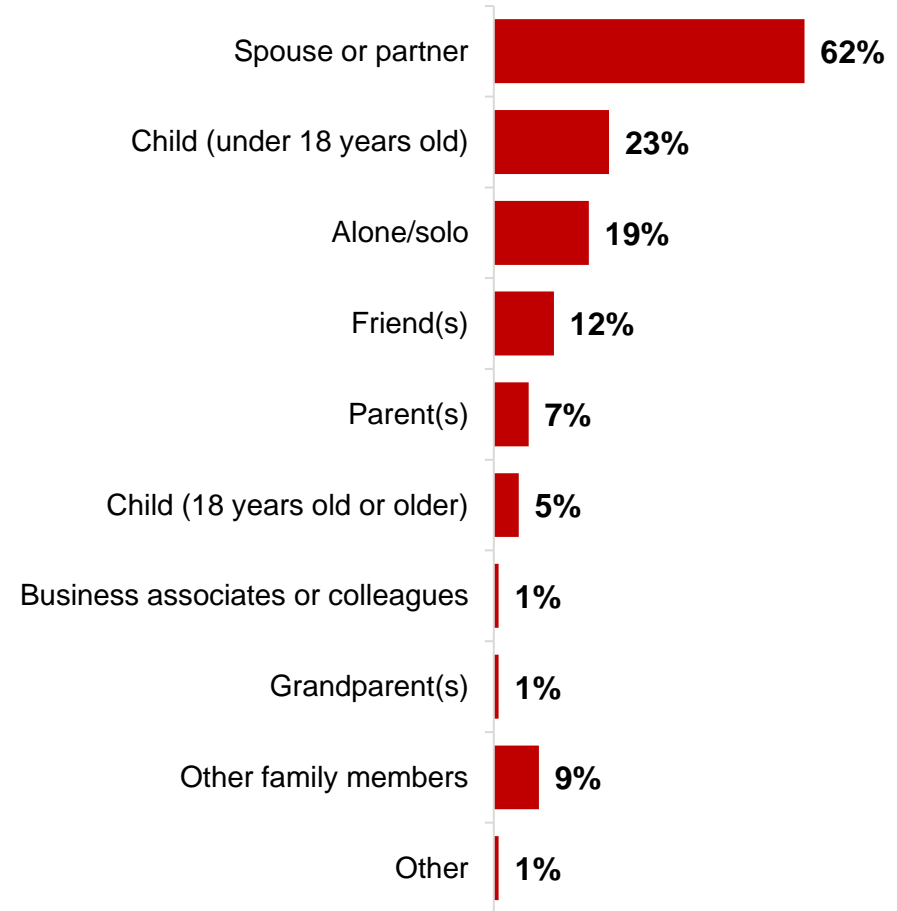
Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travellers to Canada (n=162)  
Which of the following activities, if any, did you participate in during your recent trip to Canada? (Select all that apply)



Johnston Canyon  
Alberta

# TRAVEL PARTY OF PAST 3 YEAR TRIP TO CANADA

Most travellers to Canada in the past 3 years came with a significant other. The next most common travel companions were children under 18, followed by solo travelling.

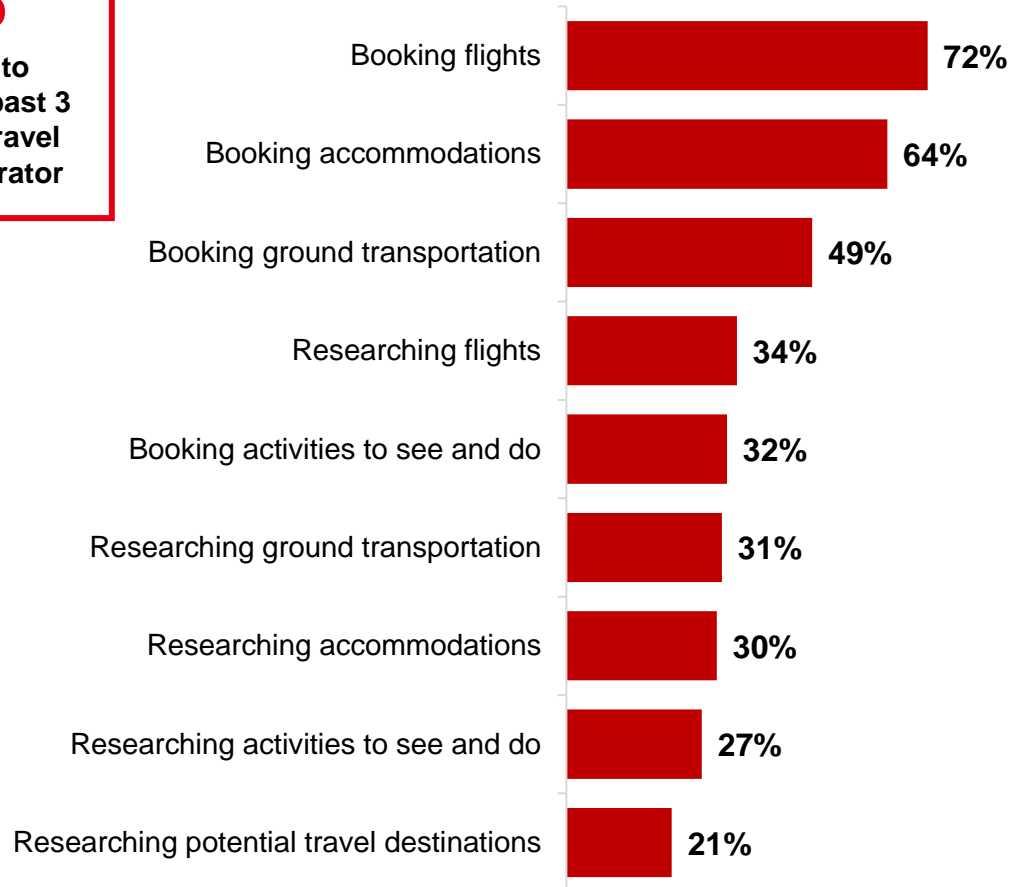


Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travellers to Canada (n=162)  
With whom did you travel on this trip? (Select all that apply)



# TRAVEL AGENTS/TOUR OPERATOR USAGE FOR PAST 3 YEAR TRIP TO CANADA

**26%**  
of travellers to Canada in the past 3 years used a travel agent/tour operator



**Travellers to Canada in the past 3 years who used a travel agent/ tour operator enlisted their help primarily to book flights and accommodations.**



Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travellers to Canada, Used a Travel Agent/Tour Operator (n=41)  
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)  
Which of the following did a travel agent or tour operator help you with?

# ORGANIZED GROUP TOUR USAGE FOR PAST 3 YEAR TRIP TO CANADA

Only one in four travellers to Canada in the past 3 years used a travel agent/ tour operator to organize their trip.

Yes, my whole trip was part of an organized group tour

14%

Yes, a portion of my trip was part of an organized group tour

10%

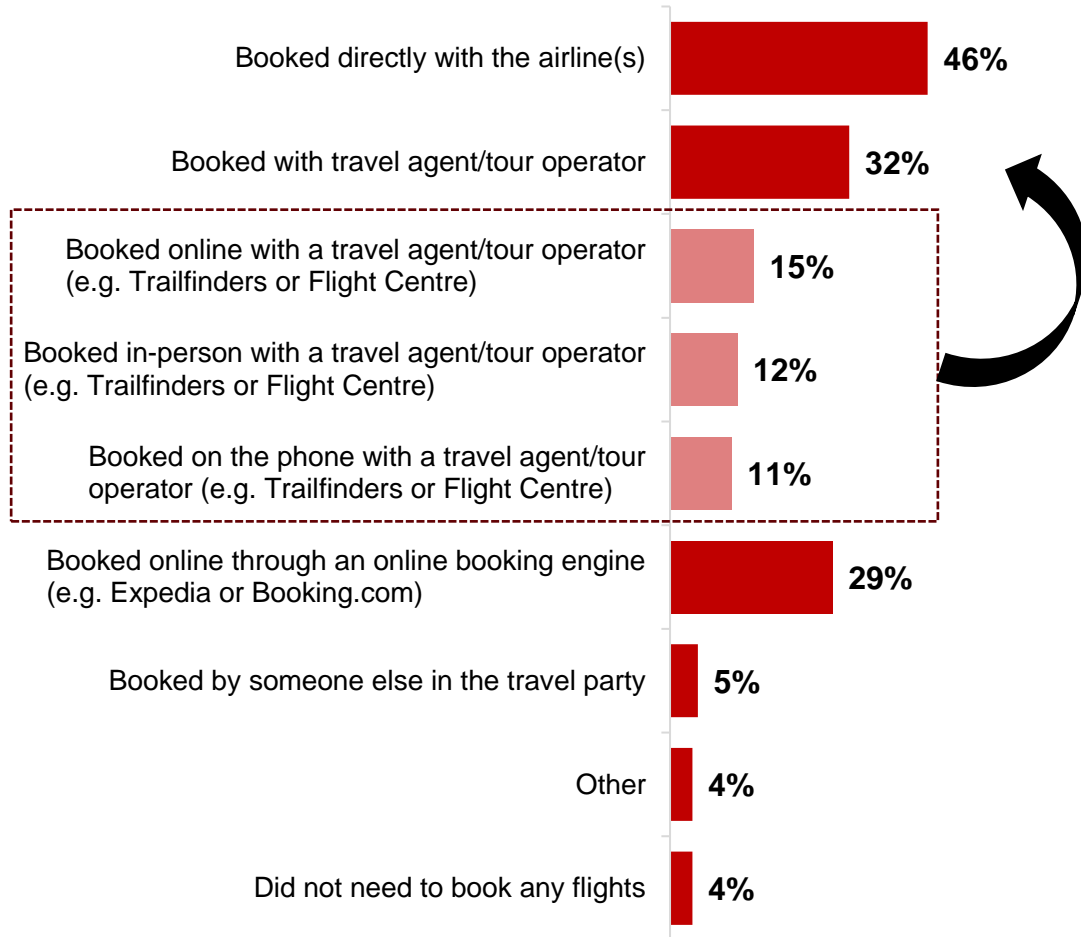
No

76%

Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travellers to Canada (n=162)  
An organized group tour consists of a package where any combination of accommodation, transportation, food and/or activities are included as a multi-day itinerary. Did you travel as a part of an organized group tour on this trip?



# BOOKING FLIGHTS FOR PAST 3 YEAR TRIP TO CANADA

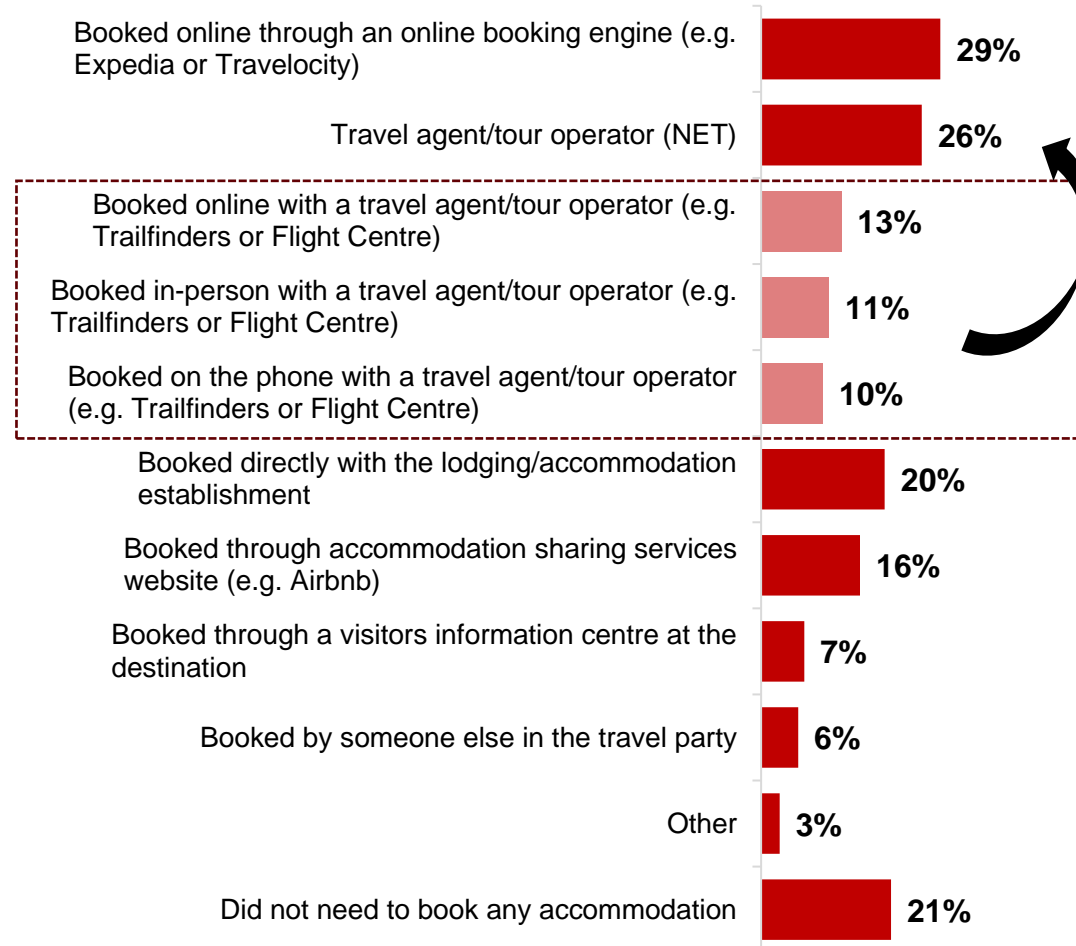


**Almost half of travellers to Canada in the past 3 years booked their flight directly with the airline. For those who used a travel agent or tour operator, online bookings were most common.**



# BOOKING ACCOMMODATIONS FOR PAST 3 YEAR TRIP TO CANADA

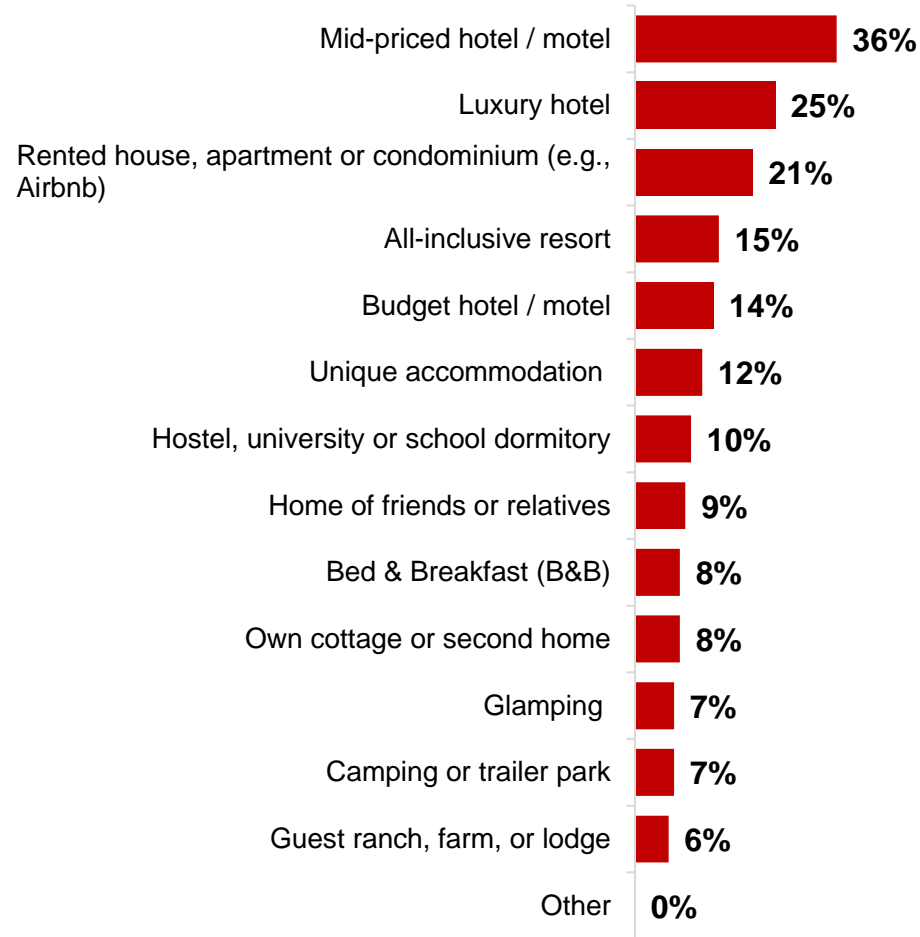
Booking accommodations through an online booking engine was the most common method, followed by travel agents or tour operators.



Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travellers to Canada (n=162)  
How did you book your accommodation for this trip? (Select all that apply)



# TYPES OF ACCOMMODATION DURING PAST 3 YEAR TRIP TO CANADA



**Travellers to Canada in the past 3 years were most likely to stay in mid-priced or luxury hotels.**



# THANK YOU

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



CANADIAN TOURISM DATA  
**collective**