

# 2021 Global Tourism Watch Highlights Report



**United Kingdom**

Canada



**Global Tourism Watch**



**DESTINATION  
CANADA**

# Study Overview: United Kingdom Market



The target population are residents aged 18 years and older who have taken a long-haul pleasure trip, where they had stayed at least 4 nights with a minimum of 1 night in paid accommodation in the past 3 years, or plan to take such a trip in the next 2 years.



## Timing of Fieldwork



**2021**

Note: this study is conducted annually. Significant differences from the last wave in November 2020 are identified with ▲ / ▼.



## Geographical Definition for Qualified Trips

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



## GTW Sample Distribution

Sample distribution: **National**

Recent visitors to Canada: **196**  
Other travellers: **1,304**  
Total sample size: **1,500**

# Market Overview

It is important to consider the results in light of the COVID-19 situation at the time of data collection (October 2021).

## COVID-19 situation in the UK

Nearly all COVID-19 restrictions were lifted in July 2021, an approach starkly different than much of Europe where vaccine passports, masking, and social distancing were in effect. Despite high vaccination rates, the UK was seeing rapid growth in COVID-19 cases in October 2021, with daily case counts being higher than France, Germany, Italy and Spain combined.<sup>1</sup> The UK government was considering implementing their more stringent Plan B containment measures, but did not do so until December 2021 when the Omicron variant hit the UK.<sup>2</sup>

## Outbound travel situation

As COVID-19 cases rose in the UK, travellers' ability to visit international destinations was in flux. Several destinations (e.g. Morocco) had or were threatening to impose tighter restrictions on UK travellers, which undermined traveller confidence.<sup>3</sup> Many top competitors were open to fully vaccinated travellers, but required PCR tests on arrival (e.g. South Africa)<sup>4</sup> while others (e.g. Australia) were closed to visitors.<sup>5</sup> The UK government had a system to identify destinations with high levels of COVID-19. Travellers returning from a 'red' list country were required to take a test, but as of October 24, 2021, rapid tests rather than PCR were acceptable. Those testing positive were required to self-isolate for 10 days.<sup>6</sup>

Canada's borders re-opened to non-resident visitors who were fully vaccinated with a Health Canada approved vaccine on September 7, 2021. All visitors still required a pre-entry COVID-19 molecular test, but quarantine requirements were eliminated for vaccinated travellers.<sup>7</sup>

<sup>1</sup> CNN, October 2021.

<sup>2</sup> Guardian, October 2021.

<sup>3</sup> Airport Technology, October 2021.

<sup>4</sup> Business Insider South Africa, January 2022.

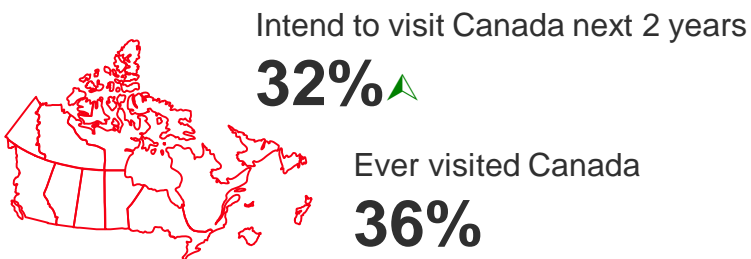
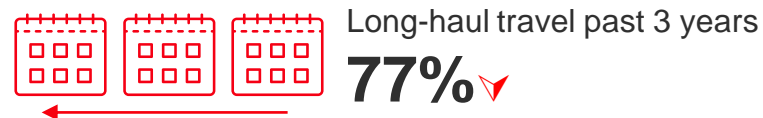
<sup>5</sup> NBC News, October 2021.

<sup>6</sup> GOV.UK, October 2021.

<sup>7</sup> Government of Canada, September 2021.

## Travel Indicators

The UK is a mature market with high levels of long-haul travel and future travel intention, including to Canada.



↗ / ↘ Significantly higher/lower than 2020 GTW wave.

# KEY HIGHLIGHTS

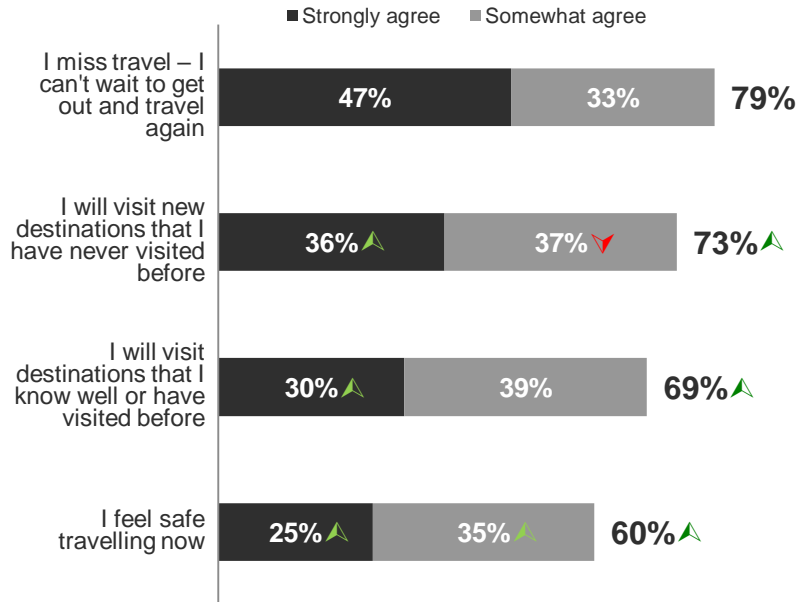
Insight	Implication
<p><b>UK travellers are feeling more optimistic about travel relative to 2020.</b> Significantly more UK travellers say they feel safe travelling now, and the likelihood to use most forms of transportation has increased.</p>	<p><i>There is an opportunity to capitalize on UK travellers' renewed interest in travel. Many destinations are competing for the UK market, so finding ways to differentiate Canada is important.</i></p>
<p><b>COVID-19 concerns related to medical care and travel insurance have dropped, but quarantine concerns (both at the destination and upon return to the UK) linger.</b> Vaccine passport requirements are not an important consideration for UK travellers.</p>	<p><i>To attract potential visitors and differentiate Canada from competitors, it is important to communicate Canada's entry requirements for fully vaccinated travellers as well as the lack of quarantine requirements.</i></p>
<p><b>Travel is the top spending priority for the next year. UK travellers are planning to spend slightly more on travel post-COVID-19 than they did pre-COVID-19.</b> While travel to short-haul destinations (within Europe, North Africa, and the Mediterranean) is projected to see the greatest percentage growth in spending, anticipated spending on long-haul travel is more than double the anticipated spending on short-haul travel.</p>	<p><i>The current prioritization of spending on travel, along with the high anticipated spend on long-haul travel post-COVID-19, presents a strong opportunity for Canada.</i></p>
<p><b>Interest in outdoor activities, particularly natural attractions and wildlife viewing, has dropped both generally and on a trip to Canada.</b> However, interest in seeing the Northern lights has increased and is now the top activity UK travellers would base a trip around. Further, interest in seeing the Northern lights on a trip to Canada has also increased.</p>	<p><i>While outdoor activities are still popular for a trip to Canada, interest in some activities is waning. Unique activities such as viewing the Northern lights on a trip to Canada may be a strong lure for UK travellers.</i></p>
<p><b>UK travellers consistently rank cost above all other barriers to visiting Canada.</b></p>	<p><i>UK travellers are cost conscious and Canada must find ways to convince prospective visitors that a Canadian vacation offers good value for money. Travel incentives and deals may also help to encourage visitation to Canada.</i></p>
<p><b>Late spring and early fall are almost as popular as the peak summer months for UK travellers considering a visit to Canada.</b> Additionally, some popular vacation activities are as popular in spring as in summer, while others hold three- or four-season appeal. However, historical visitation during the spring and fall is lower than summer months, which suggests there is potential to disperse UK visitation into the shoulder seasons.</p>	<p><i>There is an opportunity to disperse UK visitation into the shoulder seasons by promoting activities that are popular outside of the summer months.</i></p>
<p><b>Travel agents and tour operators play a substantial role in supporting travel from the UK to Canada.</b> The majority of potential UK visitors indicate that they are likely to use a travel agent to research or book a trip to Canada.</p>	<p><i>Building and maintaining relationships with the UK travel trade is important to boosting visitation to Canada.</i></p>

# COVID-19 Considerations

# Attitudes Toward Travel and Transportation Modes

- ▶ Significantly more UK travellers say they feel safe travelling now (60%, up from 24% in 2020). However, older travellers (55+ years) remain more cautious. As comfort levels increase, UK travellers are more enthused about travel generally, with a slight preference for visiting new destinations over familiar ones.
- ▶ As COVID-19 restrictions ease, UK travellers are also growing more comfortable with using most forms of transportation, including flying internationally (65%, up from 48% in 2020).

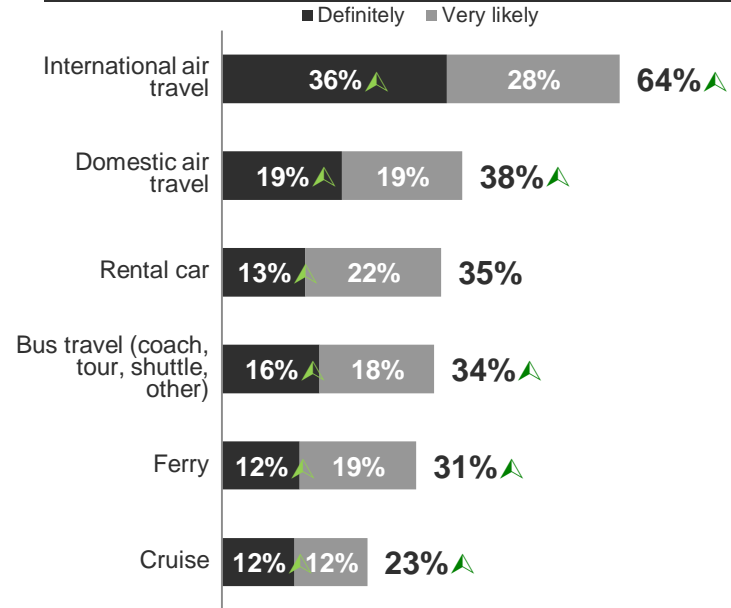
## Attitudes Toward Travel



▲ / ▼ Significantly higher/lower than 2020 GTW wave.

Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=1500) COV13. Thinking of your next holiday, as government restrictions allow, how much do you agree or disagree with the following statements?

## Transportation Modes

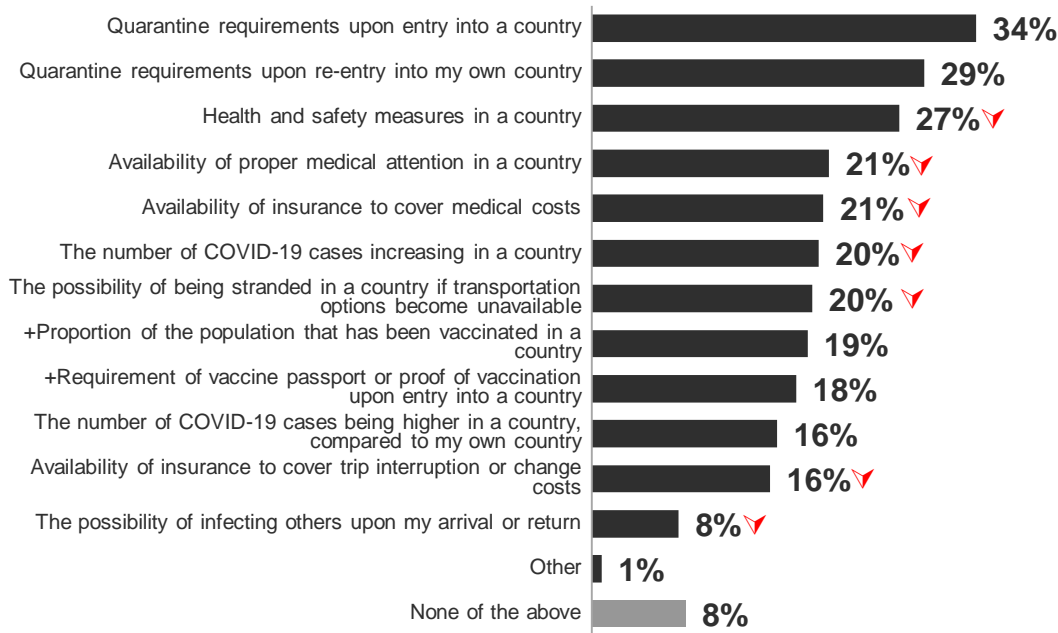


▲ / ▼ Significantly higher/lower than 2020 GTW wave.

Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=1500) COV16. As government restrictions allow, how likely are you to use the following modes of transportation?

# Most Important Considerations in Selecting Travel Destination

- ▶ When selecting a destination, concerns related to health and safety measures, medical care, travel insurance, COVID-19 caseloads, and other related COVID-19 concerns are generally subsiding. Proof of vaccination/vaccine passports are also not high on UK travellers' list of considerations when selecting a travel destination.
- ▶ Quarantine requirements at a destination and upon re-entry to the UK remain the top concerns. In October 2021, there were no quarantine requirements for vaccinated travellers to enter Canada or upon return to the UK.



▲ / ▼ Significantly higher/lower than 2020 GTW wave.

+ New statement in 2021 GTW – no trending.

Base: Long-haul pleasure travelers (past 3 years or next 2 years) (n=1500)

# Key Performance Indicators

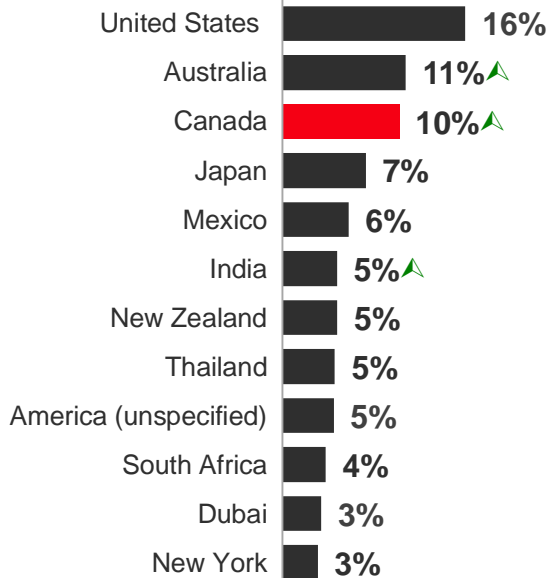


# Unaided Long-Haul Destination Consideration (Next 2 Years)

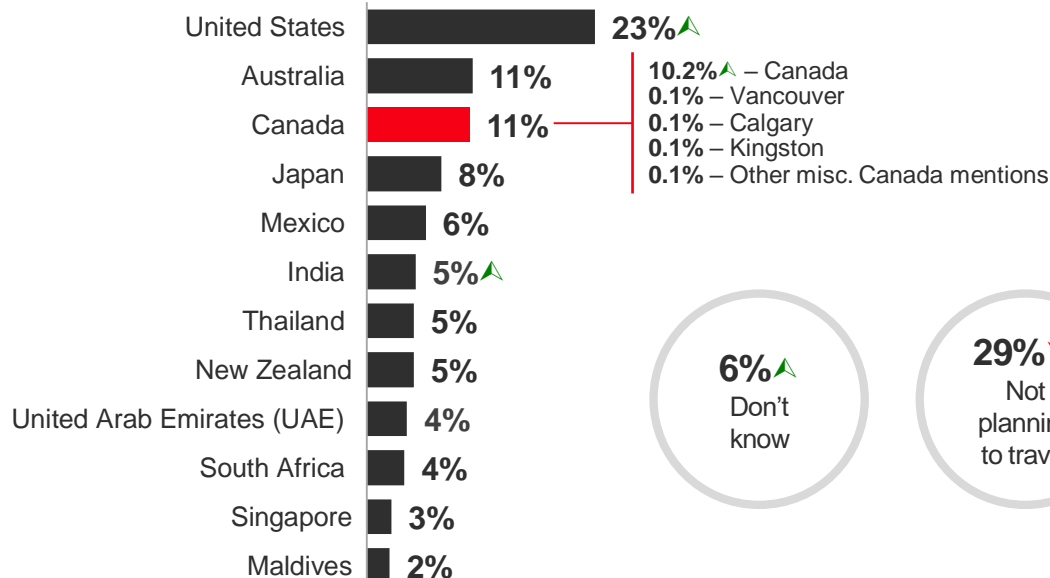
**Unaided consideration** represents the top-of-mind presence of destinations in the consumer mindset and requires travellers to think of destinations without being prompted.

- ▶ Canada is tied with Australia as the #2 top-of-mind country that UK travellers are considering visiting in the next 2 years. Meanwhile, mentions of the United States – the perennial top performer in this market – are up significantly compared to 2020.

## Top 12 Destination Brands<sup>1</sup>



## Top 12 Destination Countries<sup>2</sup>



6%▲  
Don't know

29%▼  
Not planning to travel

▲ / ▼ Significantly higher/lower than 2020 GTW wave.

<sup>1</sup> Responses as mentioned by respondents (e.g., percentage who said "Canada" specifically).

<sup>2</sup> Roll-up of brand mentions by country (e.g., percentage who said "Canada" or any destination in Canada).

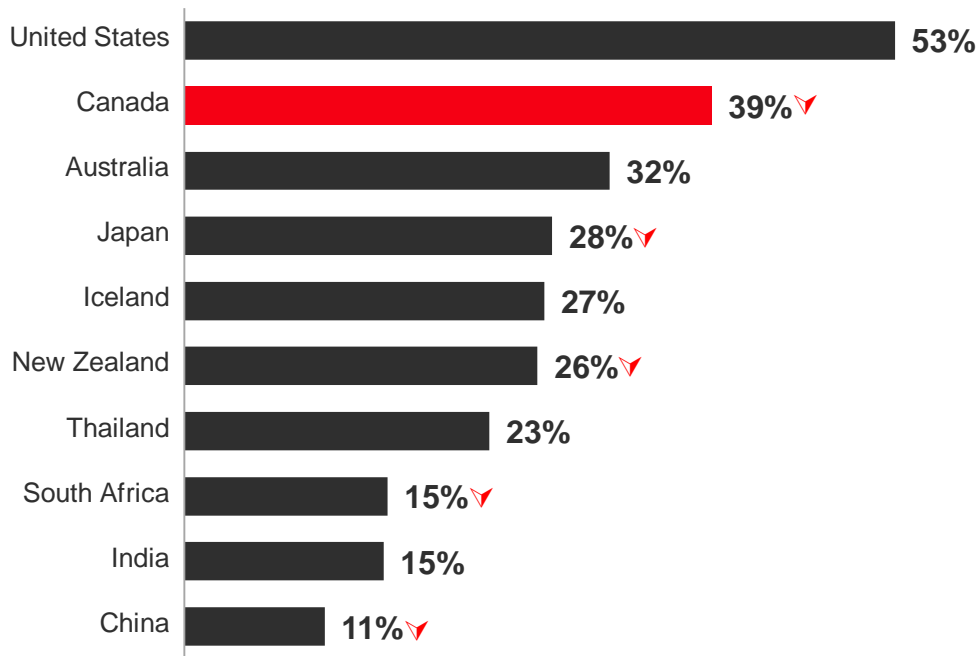
Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=1500)

S8. 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)

# Aided Destination Consideration (Next 2 Years)

**Aided consideration** represents the proportion of travellers who say they would seriously consider visiting a destination, when prompted with a list of potential destinations. For these travellers, Canada may not be top-of-mind as a destination, but they are considering a visit in the next 2 years.

► Despite a significant decline compared to 2020, Canada still ranks second on aided consideration – well behind the United States, and just ahead of Australia.



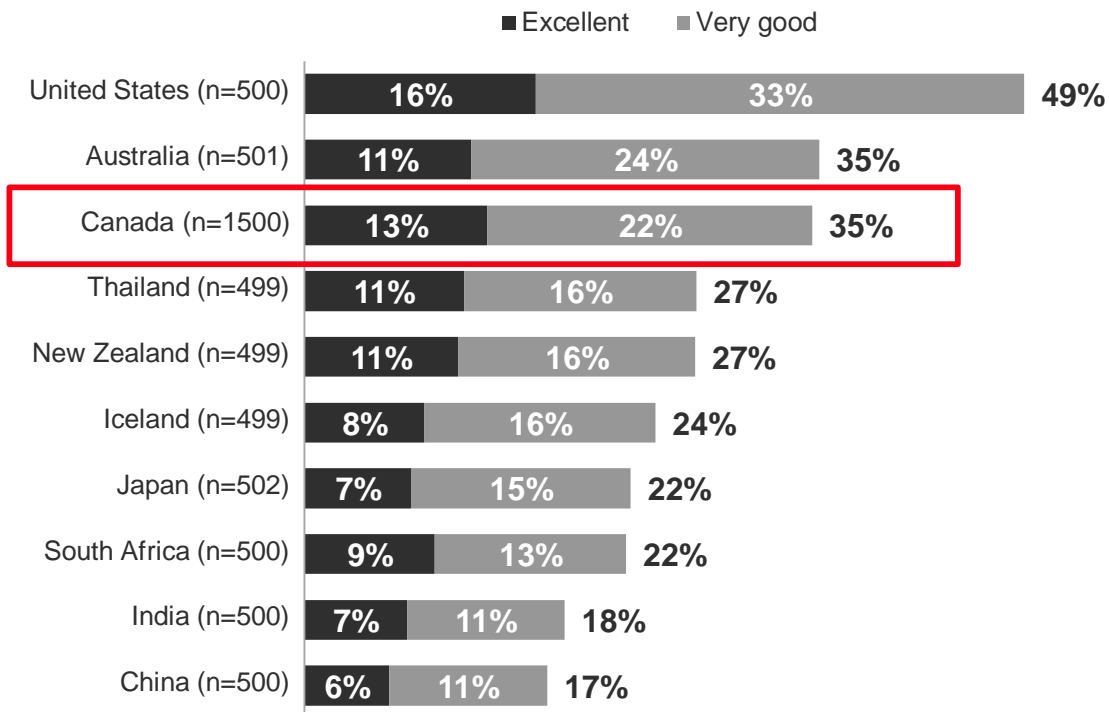
▲ / ▼ Significantly higher/lower than 2020 GTW wave.

Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=1500)

BVC1. You may have already mentioned this before, but which destinations would you seriously consider visiting in the next 2 years? (Select all that apply)

# Knowledge of Holiday Opportunities

▶ Canada ranks high on destination knowledge among long-haul competitors – tied with Australia at #2 but trailing the United States by a considerable margin.



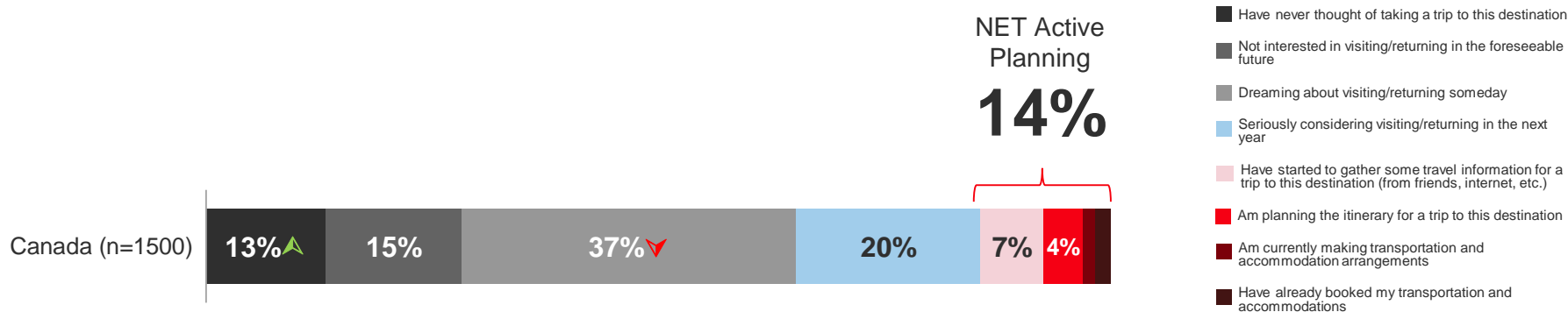
▲ / ▼ Significantly higher/lower than 2020 GTW wave.

Base: Long-haul pleasure travellers (past 3 years or next 2 years) evaluating each destination  
MP3. How would you rate your level of knowledge of holiday opportunities in each of the following destinations?

# Stage in the Purchase Cycle by Market

There is a purchasing or decision-making cycle associated with long-haul travel; consumers move through progressive stages from not knowing anything about a destination to booking a trip. **NET Active Planning** represents the final four stages, or lower funnel, of this path-to-purchase cycle.

- ▶ Between 9% and 19% of UK travellers are in the lower funnel stages of the purchase cycle for Canada's top competitor long-haul destinations. Canada is ranked 3<sup>rd</sup> overall, tied with three other destinations, with 14% of UK travellers in the NET active planning stages for a trip to Canada. This suggests that several destinations are under serious consideration by UK travellers and Canada may face a challenge converting interested travellers into visitors.
- ▶ Compared to 2020, fewer UK travellers say that they are dreaming about visiting Canada, while more say they have never thought of visiting, which suggests more can be done to promote Canada in the UK at the awareness and consideration stages.

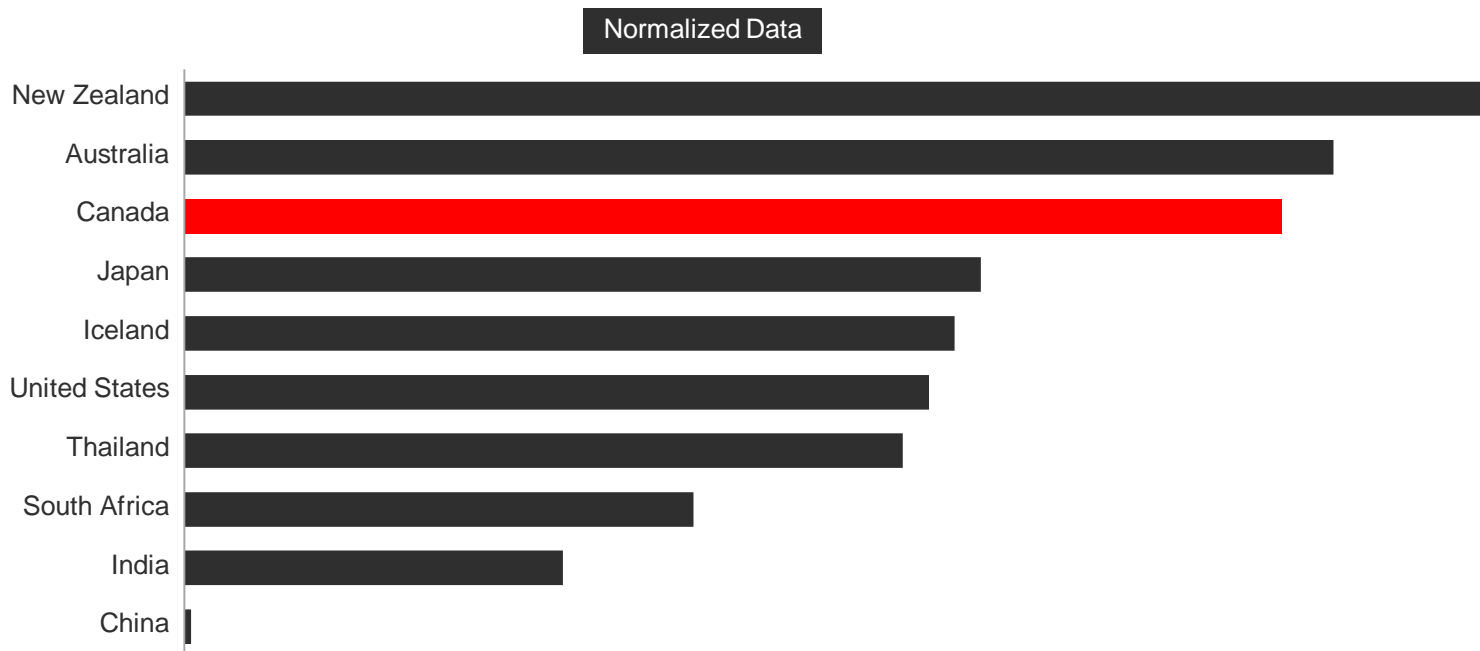


▲ / ▼ Significantly higher/lower than 2020 GTW wave.

# NET Promoter Score (NPS)

*The Net Promoter Score (NPS) measures the likelihood of travellers to recommend a destination. It is an important measure for advocacy, since a high NPS score suggests that those who have visited Canada are more likely to encourage others to visit. Results are gathered among travellers who have ever visited the destination and data has been normalized to indicate relative NPS scores across all competitors.*

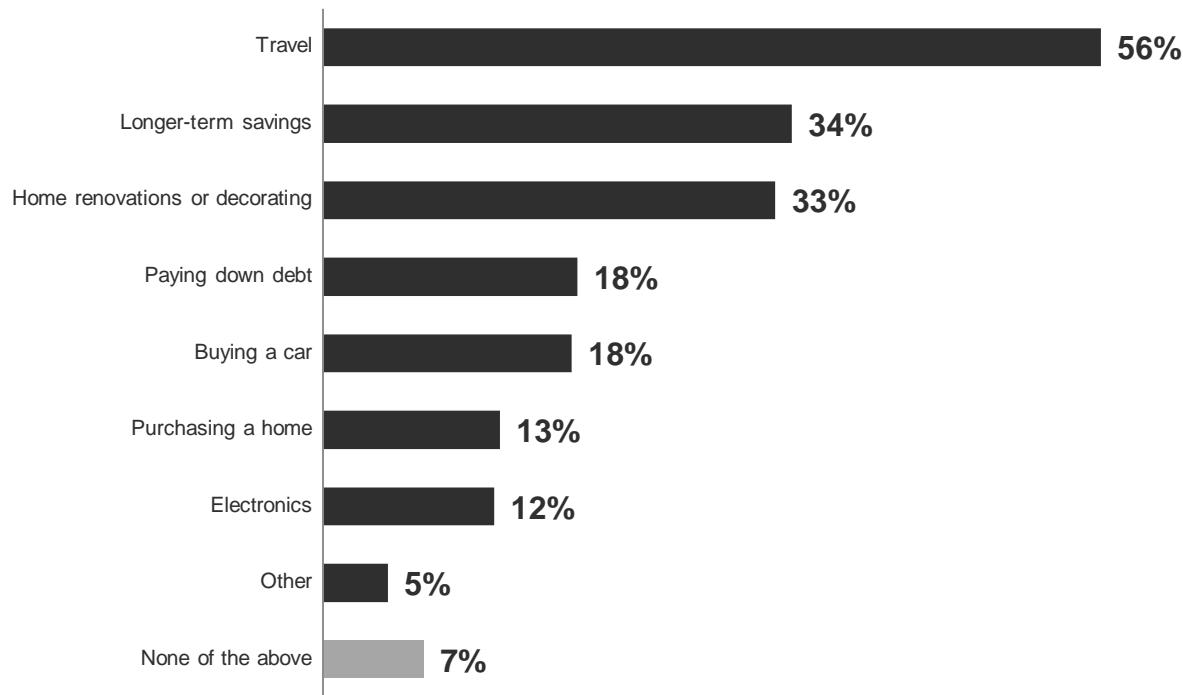
► Compared to competitive destinations, Canada is ranked 3<sup>rd</sup> overall, down from the 2<sup>nd</sup> spot in 2020 due to a significant drop in Canada's overall NPS score.



# Travel Spending and Canada Travel Intent

# Spending Priorities for the Next Year<sup>+</sup>

► Travel is the top immediate spending priority for UK travellers in 2021, far ahead of secondary priorities such as savings and home renovations.



<sup>+</sup> New question in 2021 GTW – no trending.

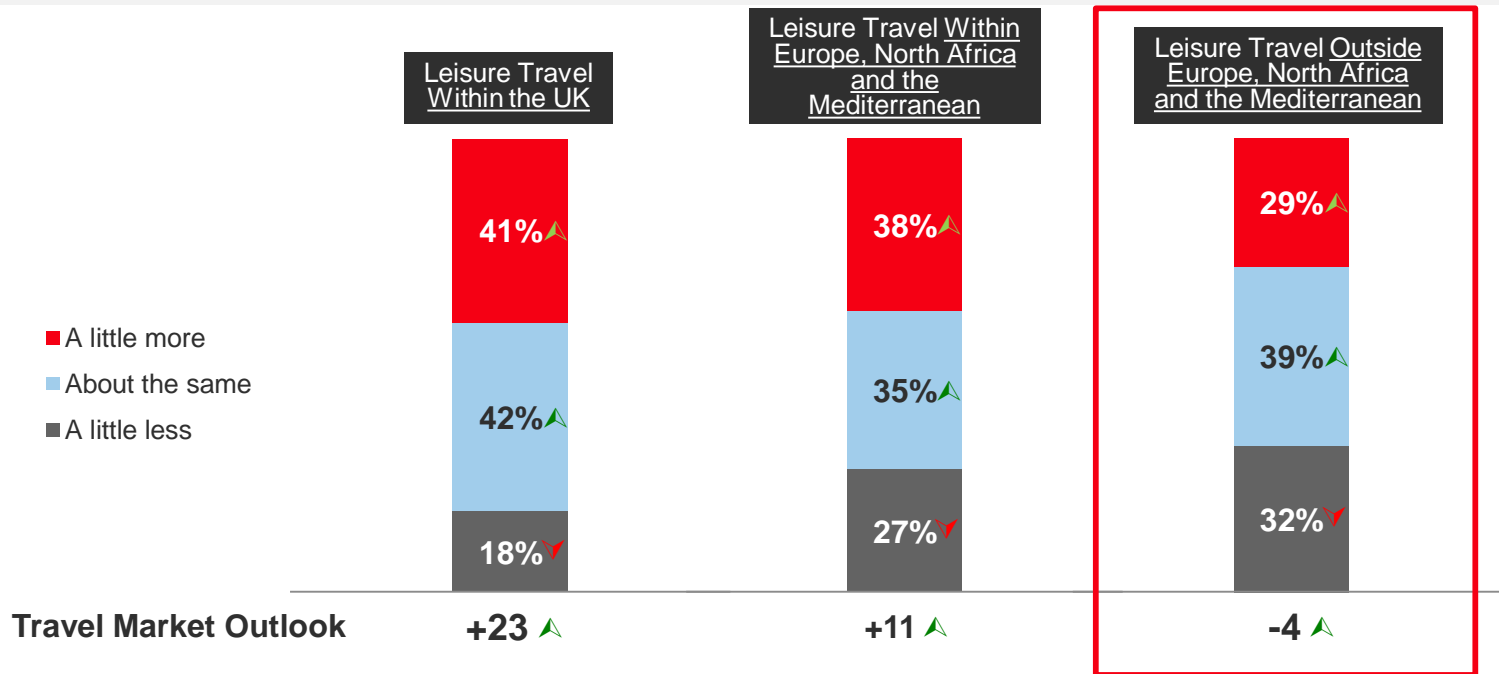
Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=1500)

AT. In the next 12 months, which of following will you prioritize spending money on? (Select up to 3 options)

# Travel Spending Intentions (in Next 12 Months)

**Travel Market Outlook** is the difference between the proportion who say they will spend more on travel in the next 12 months than they did in the last 12 months, minus the proportion who say will spend less on travel in the next 12 months than in the last 12 months.

- ▶ UK travellers foresee spending more on all types of travel in the next year than they did in the past year. The short-haul travel outlook is most improved (-35 in 2020 vs +11 in 2021).
- ▶ While the long-haul travel outlook is still negative, it is significantly improved from 2020 (-41) and is in line with 2019 (-2).



▲ / ▼ Significantly higher/lower than 2020 GTW wave.

Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=1500)  
 S2. How would you describe your spending intentions on the following items in the next 12 months compared to the last 12 months? Will you spend ...?



# Travel Spending+

- ▶ UK travellers anticipate spending slightly more on travel post-COVID-19 than they did pre-COVID-19, regardless of the destination.
- ▶ While travel to short-haul destinations (within Europe, North Africa, and the Mediterranean) is projected to see the greatest percentage growth in spending, anticipated spending on long-haul travel (\$7,510) is more than double the anticipated spending on short-haul travel (\$3,692).

## Mean Annual Household Spend on Vacation Trips

PRE-COVID	POST-COVID	NET CHANGE <i>POST-COVID</i> <i>MINUS</i> <i>PRE-COVID</i>	
<b>Travelling within the UK</b>			
\$1829	\$1875	+\$46	(+3%)
<b>Travelling within Europe, North Africa and the Mediterranean</b>			
\$3382	\$3692	+\$310	(+9%)
<b>Travelling outside Europe, North Africa and the Mediterranean</b>			
\$7102	\$7510	+\$408	(+6%)

\* New questions in 2021 GTW – no trending.

Base: Long-haul pleasure travellers who travelled in 2019 (n=629 Domestic / n=580 Short-haul / n=532 Long-haul)

TP2\_INT. Thinking about the holiday trips you took in 2019, approximately how much did your immediate household spend in total on trips to each destination? A rough estimate is fine but if you cannot remember please select don't know. (PRE-COVID)

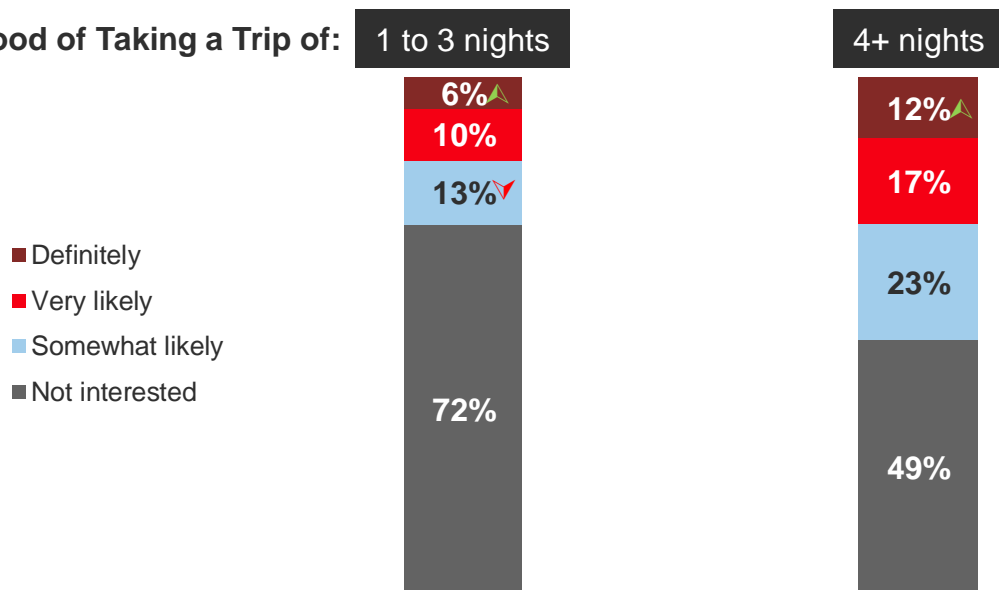
Base: Long-haul pleasure travellers who expect to travel post-COVID-19 (n=648 Domestic / n=628 Short-haul / n=586 Long-haul)

TP2B\_INT. Thinking about the vacation trips you plan to take when COVID-19 is no longer a consideration, approximately how much does your immediate household intend to spend in total on trips to each destination? A rough estimate is fine but if it's too hard to predict please select don't know. (POST-COVID)

# Likelihood of Visiting Canada in Next 2 Years

- ▶ Among all UK travellers, the likelihood of visiting Canada in the next two years is up significantly from 2020.
- ▶ Intent to visit Canada in the next two years is highest among those aged 18-34 and lowest among those aged 55+.
- ▶ UK travellers are much more likely to be considering a trip to Canada of 4+ nights than a shorter trip of 1-3 nights.

## Likelihood of Taking a Trip of:



**32%** ▲  
Likely  
(definitely/very likely) to visit  
Canada in next  
2 years

▲ / ▼ Significantly higher/lower than 2020 GTW wave.

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 pleasure travellers (past 3 years or next 2 years) (n=1500)

MP6. Realistically, how likely are you to take a holiday trip to Canada in the next 2 years?

# Potential Market Size For Canada

Study data is used to estimate the size of the potential market for Canada in two ways – the target market (proportion of all UK travellers in the dream to purchase stages of the purchase cycle for Canada) and the immediate potential market (intention among the target market to visit in the next two years).

- ▶ The proportion of UK travellers considering Canada contracted in 2021, but within that group the intention to visit in the next two years increased significantly, resulting in an immediate potential market size of 6.2 million.

## Size of the Potential Market to Canada (Next 2 Years)

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



Target Market for Canada

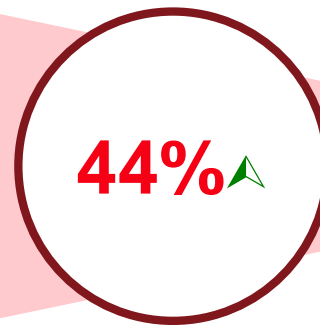


Those in the dream to purchase stages of the path to purchase for Canada

Size of the target market



Immediate Potential for Canada



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

Immediate potential



▲ / ▼ Significantly higher/lower than 2020 GTW wave.

<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=1500); Immediate potential for Canada = dream to purchase stages for P2P for Canada (n=1084)

MP1. Which of the following best describes your current situation when thinking about each of the following destinations for a holiday trip?

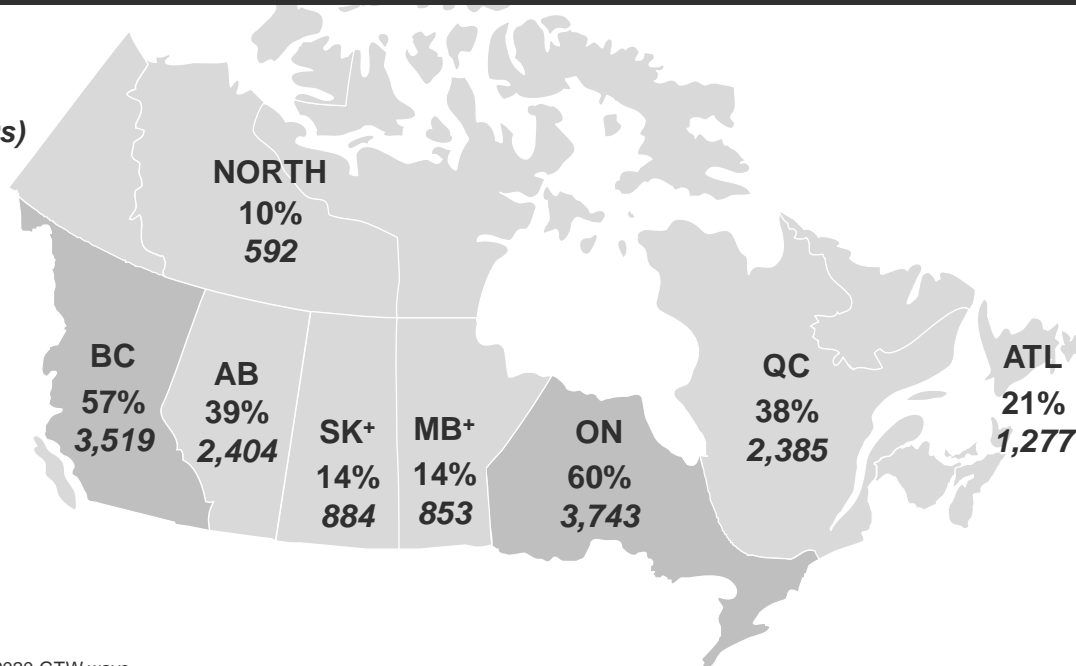
MP6. Realistically, how likely are you to take a holiday trip to Canada in the next 2 years?

# Potential Market Size for the Regions

- ▶ UK traveller interest in visiting Canadian regions has not shifted significantly since 2020. Ontario and BC continue to stand out as the provinces most likely to attract the largest share of UK travellers.

Immediate Potential for Canada: **6,228,000**

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



▲ / ▼ Significantly higher/lower than 2020 GTW wave.

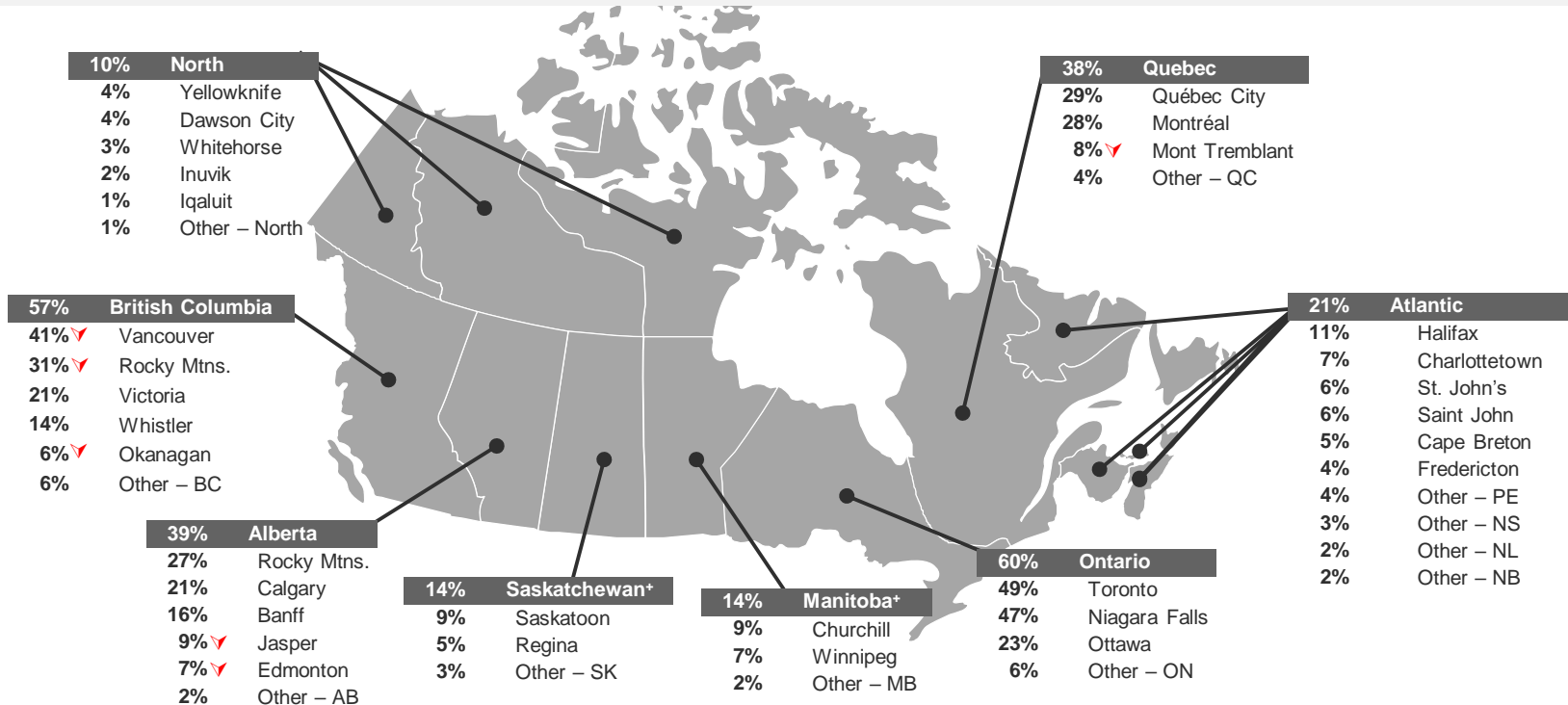
+ Saskatchewan and Manitoba were combined in 2020 GTW wave – no trending.

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=487)

MP7. If you were to take a holiday trip to Canada in the next 2 years, which of the following Canadian travel destinations are you likely to visit? (Select all that apply)

# Canadian Destinations Likely to Visit

- ▶ Although UK traveller interest in visiting different Canadian regions overall is similar to 2020, interest in some Western Canadian destinations, as well as Mont Tremblant in Quebec, has waned in 2021.



▲ / ▼ Significantly higher/lower than 2020 GTW wave.

\* Saskatchewan and Manitoba were combined in 2020 GTW wave – no trending.

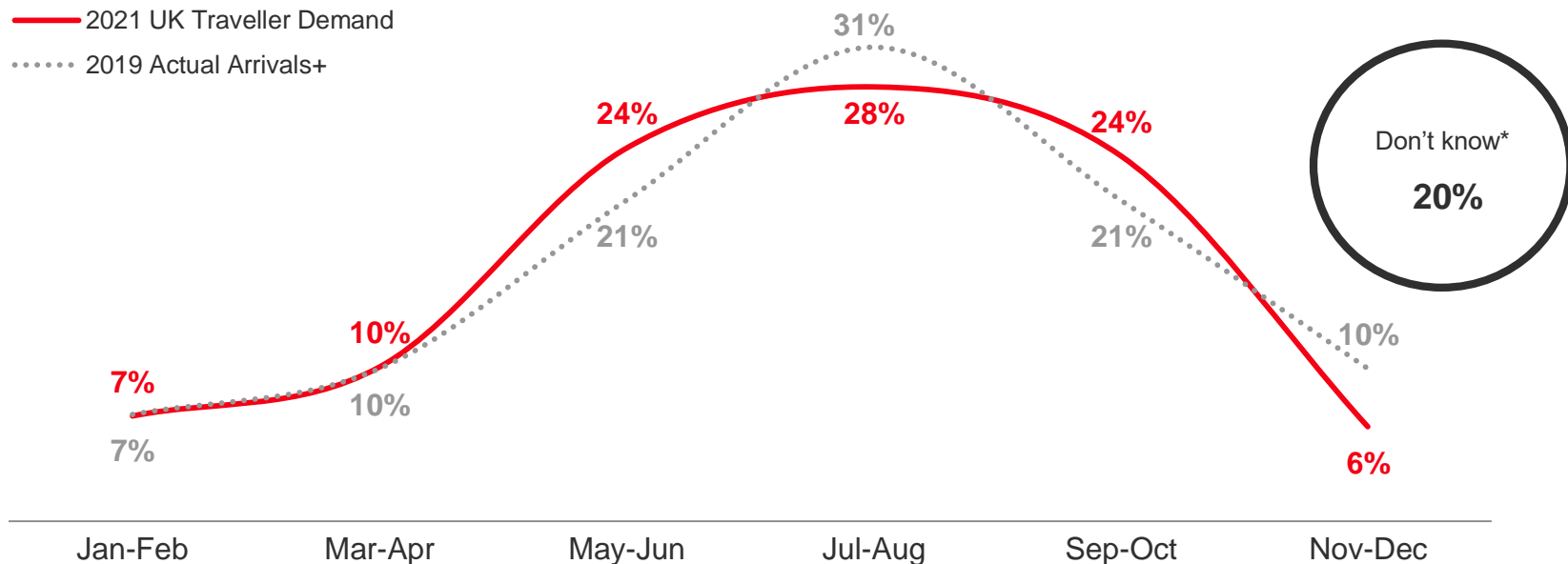
Base: Those in the dream to purchase stages of the path to purchase for Canada and definitely/very likely to take a trip to Canada (n=487)

MP7. If you were to take a vacation trip to Canada in the next 2 years, which of the following Canadian travel destinations are you likely to visit? (Select all that apply)

MP7a-i. Within [province/region], which travel destinations are you likely to visit? (Select all that apply)

# UK Seasonal Demand for Canada

- ▶ July and August are the most popular months for UK travellers considering a visit to Canada, and also historically the peak months for visitor arrivals from the UK.
- ▶ Late spring and early fall are almost as popular as the peak summer months for UK travel demand. There is potential to disperse UK visitation into the shoulder seasons given that demand outpaces historical visitation during these months.



+ Source: 2019 Statistics Canada Frontier Border Counts.

\* 'Don't know' responses excluded from seasonal demand chart.

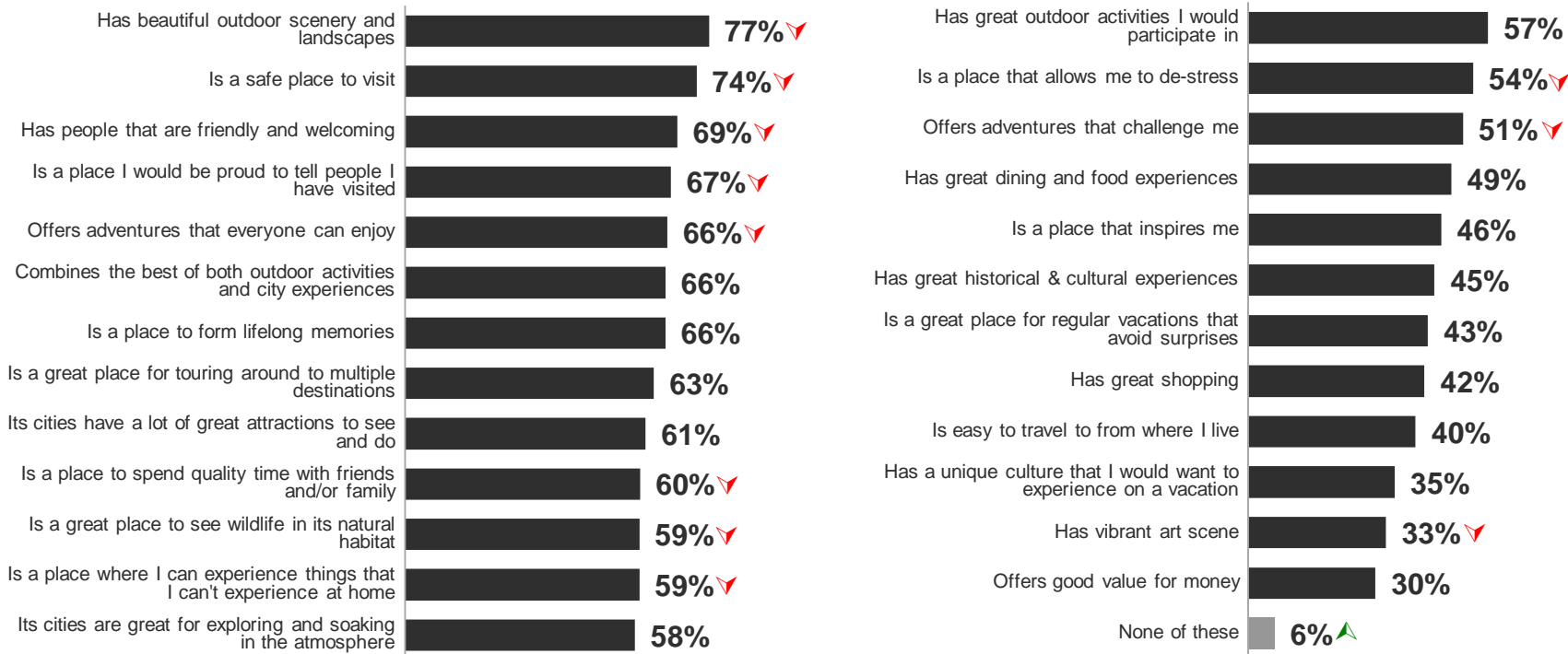
▲ / ▼ Significantly higher/lower than 2020 GTW wave.

Base: Those in the dream to purchase stages of the path to purchase for Canada, excluding 'Don't know' (n=868)  
PC3. What time of year would you consider taking a holiday trip to Canada in the next 2 years? (Select all that apply)

# Impressions of Canada

# Impressions of Canada as a Holiday Destination

▶ Canada is best known among UK travellers for beautiful scenery and landscapes, being a safe destination, and having friendly & welcoming people. However, the proportion of UK travellers associating Canada with these top attributes, as well as several other attributes, declined in 2021.



▲ / ▼ Significantly higher/lower than 2020 GTW wave.

Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=1500)

MP5\_NEW. We are interested in your general impressions about destinations, even if you have never been there. Please select all the destination you think apply to the statement. Select None of these if you think none of the destinations apply.



# Key Barriers for Visiting Canada

- Similar to 2020, cost concerns continue to stand out as the top deterrent for potential UK travellers to visit Canada in 2021. As COVID-19 vaccines became more globally available in 2021, health risks and safety concerns have declined in importance, while concerns about visa requirements increased, especially among those 18-34 years.



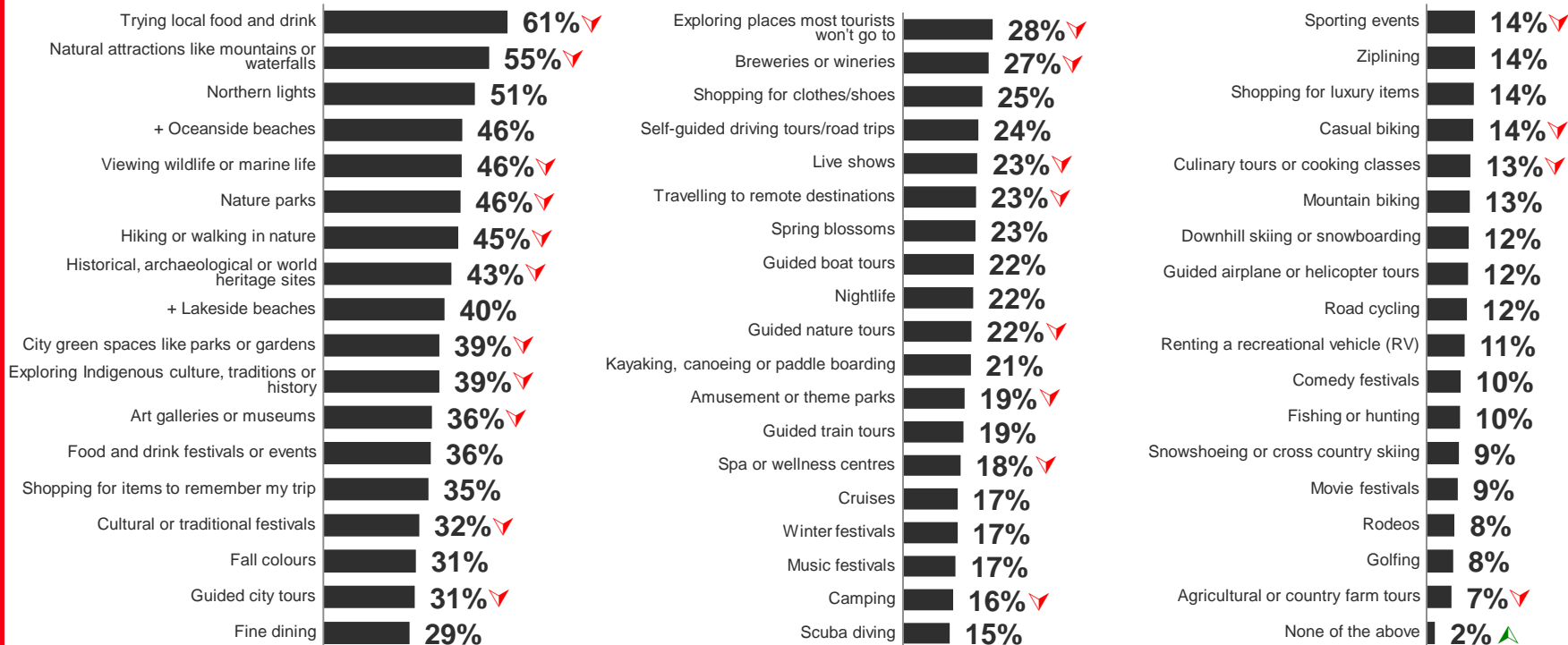
▲ / ▼ Significantly higher/lower than 2020 GTW wave.

Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=1500)  
MP9. Which of the following factors might discourage you from visiting Canada? (Select all that apply)

# Vacation Interests

# Activities Interested in While on Holiday

- ▶ Along with trying local food and drink, UK travellers have a strong preference for nature-based holiday activities.
- ▶ General interest in a wide variety of vacation activities, including both nature and city-based activities, has decreased compared to 2020.



+ New statement in 2021 GTW – no trending.

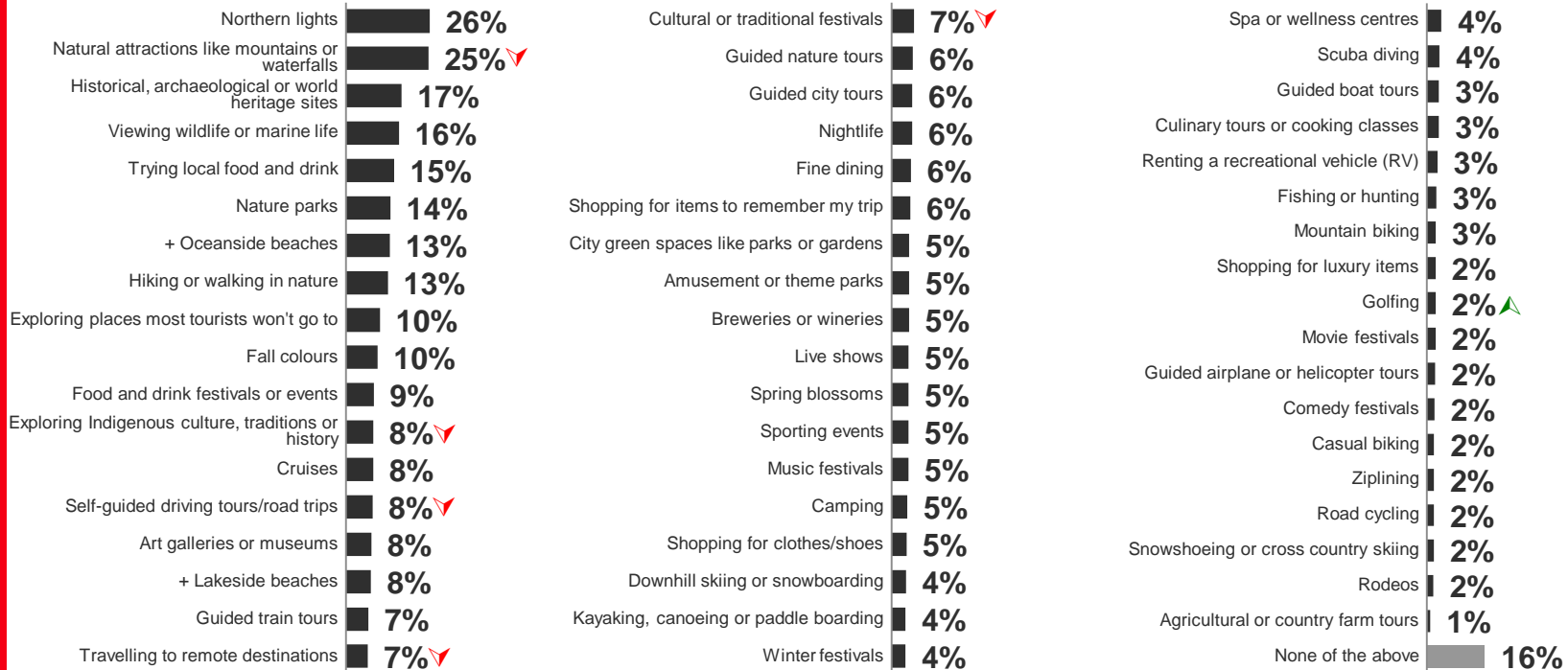
Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=1500)

MP10. In general, what activities or places are you interested in while on vacation? (Select all that apply)

▲ / ▼ Significantly higher/lower than 2020 GTW wave.

# Activities to Base an Entire Trip Around

- ▶ Seeing the Northern lights is the top activity UK travellers would base a trip around, which presents a key opportunity for Canada. Natural attractions like mountains and waterfalls are also a strong trip anchor, although interest is down compared to 2020.



▲ / ▼ Significantly higher/lower than 2020 GTW wave.

+ New statement in 2021 GTW – no trending.

Base: Long-haul pleasure travellers (past 3 years or next 2 years) answering (n=1465)

MP12. Among these activities, are there any that are important enough that you would base an entire trip around that activity? (Select all that apply)

# Time of Year Would Participate in Activities While on Holiday\*

- Summer is the preferred season to take part in almost all listed vacation activities, but some popular activities such as natural attractions, nature parks, and hiking/walking in nature are as popular in spring as in summer. Other activities such as experiencing Indigenous culture, cultural festivals, and breweries and wineries hold three season appeal. There are also several activities, especially city-oriented activities, which are popular year-round.


	Summer	Fall	Winter	Spring
Trying local food and drink	81%	59%	54%	72%
Natural attractions like mountains or waterfalls	65%	37%	20%	62%
Northern lights	15%	29%	74%	23%
Oceanside beaches	91%	14%	6%	34%
Viewing wildlife or marine life	71%	36%	22%	64%
Nature parks	65%	39%	18%	65%
Hiking or walking in nature	70%	49%	17%	72%
Historical, archaeological or world heritage sites	71%	46%	26%	64%
Lakeside beaches	85%	16%	9%	40%
City green spaces like parks or gardens	76%	47%	20%	70%
Exploring Indigenous culture, traditions or history	76%	57%	43%	74%
Art galleries or museums	68%	59%	53%	73%
Food and drink festivals or events	75%	42%	35%	60%
Shopping for items that help me remember my trip	72%	53%	46%	64%
Cultural or traditional festivals	70%	45%	36%	63%
Fall colours	n/a	100%	n/a	n/a
Guided city tours	69%	46%	36%	69%
Fine dining	75%	54%	52%	67%

	Summer	Fall	Winter	Spring
Exploring places most tourists won't go to	59%	36%	26%	57%
Breweries or wineries	71%	50%	37%	68%
Shopping for clothes and shoes	65%	45%	47%	58%
Self-guided driving tours or road trips	63%	38%	16%	59%
Live shows	76%	49%	46%	62%
Travelling to remote destinations	74%	39%	21%	62%
Spring blossoms	n/a	n/a	n/a	100%
Guided boat tours	77%	21%	11%	45%
Nightlife	78%	40%	39%	58%
Guided nature tours	60%	37%	20%	67%
Kayaking, canoeing or paddle boarding	82%	21%	12%	50%
Amusement or theme parks	83%	26%	17%	56%
Guided train tours	52%	48%	32%	63%
Spa or wellness centres	66%	49%	56%	64%
Cruises	74%	21%	20%	41%
Winter festivals	n/a	n/a	100%	n/a
Music festivals	82%	20%	18%	47%
Camping	74%	24%	12%	48%

	Summer	Fall	Winter	Spring
Scuba diving	83%	16%	10%	38%
Sporting events	69%	39%	34%	55%
Ziplining	76%	28%	14%	51%
Shopping for luxury items	65%	40%	47%	59%
Casual biking	70%	28%	10%	58%
Culinary tours or cooking classes	61%	46%	45%	79%
Mountain biking	73%	32%	14%	58%
Downhill skiing or snowboarding	-	-	100%	-
Guided airplane or helicopter tours	62%	28%	15%	49%
Road cycling	66%	26%	15%	53%
Renting a recreational vehicle (RV)	66%	36%	23%	61%
Comedy festivals	65%	37%	37%	57%
Fishing or hunting	57%	32%	23%	57%
Snowshoeing or cross country skiing	-	-	100%	-
Movie festivals	59%	32%	36%	63%
Rodeos	75%	22%	13%	43%
Golfing	62%	19%	17%	51%
Agricultural or country farm tours	51%	30%	13%	59%

\* New question in 2021 GTW – no trending.

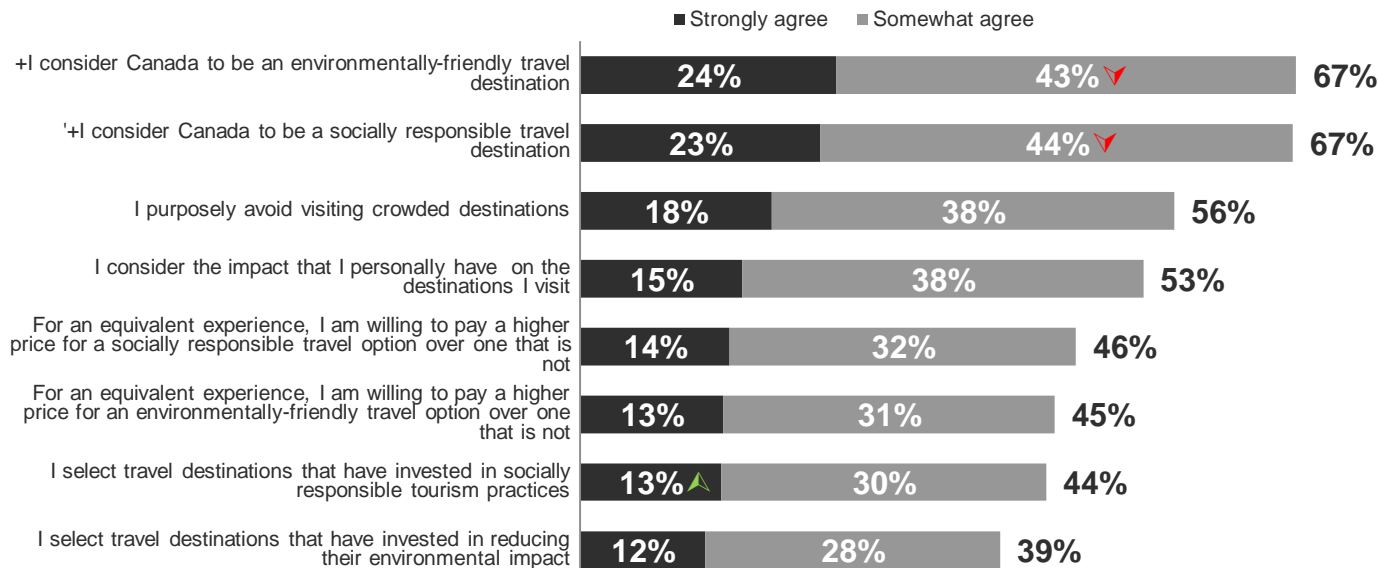
Base: Long-haul pleasure travellers (past 3 years or next 2 years) interested in activity MP10A. Thinking about activities or places you are interested in while on vacation, when would you typically take part in these activities? (Select all that apply) Note that the seasons refer to the destination's seasons.

 >50% of respondents who are interested in the activity would participate in this season

 40-49% of respondents who are interested in the activity would participate in this season

# Sustainable Travel

- ▶ Just over half of UK travellers say they are thinking about their personal impact travel destinations, with a similar number saying they would pay more for environmentally and socially responsible options.
- ▶ A majority of those interested in taking a trip to Canada consider it to be a socially responsible and environmentally-friendly travel destination.
- ▶ However, a much smaller number mention the availability of eco-friendly (10%) or socially responsible (8%) travel options as factors influencing their choice of Canada as a travel destination.<sup>1</sup>



▲ / ▼ Significantly higher/lower than 2020 GTW wave.

<sup>1</sup> Data can be found on page 32.

+ Base: Asked among those in the dream to purchase stages of the path to purchase for Canada (n=1084)

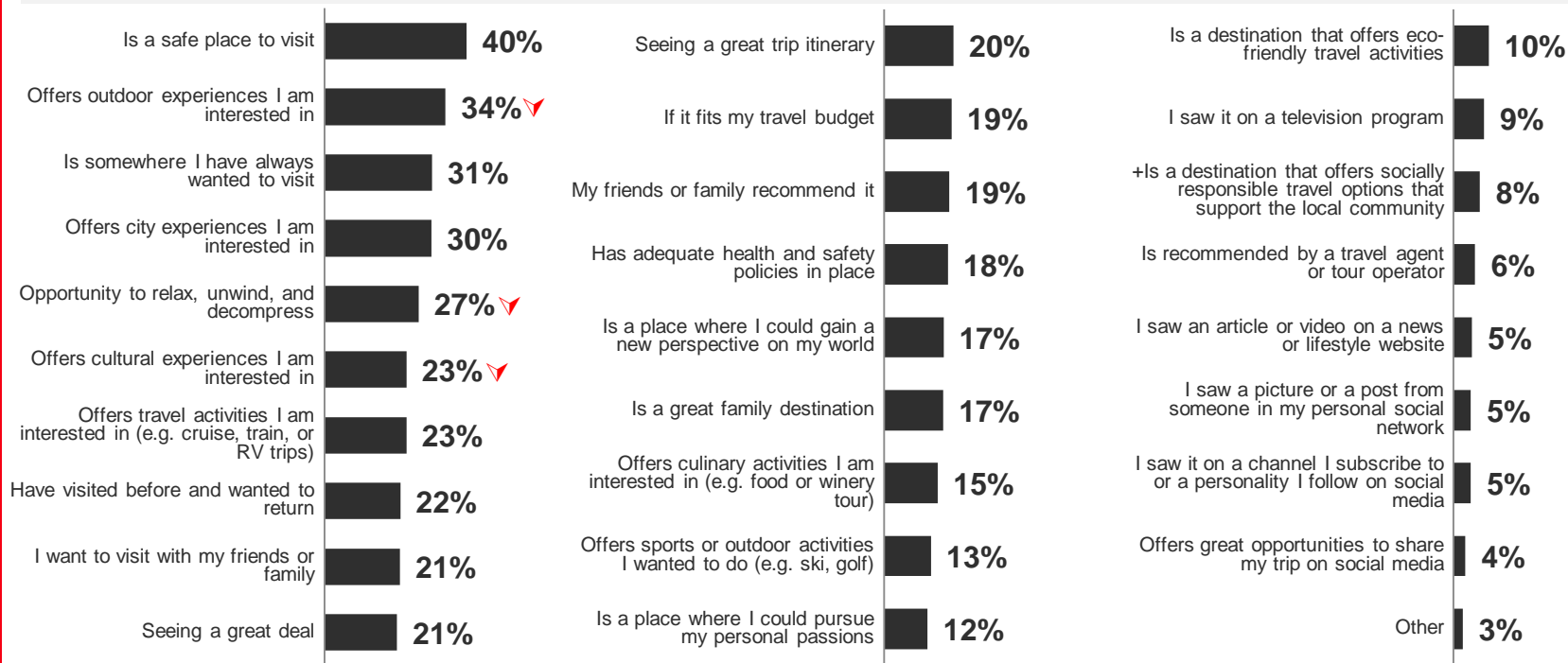
Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=1500)

PC31. Sustainable travel refers to "travel that minimises any negative impact 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". Please indicate your level of agreement with each of the following statements ...

# Key Characteristics of Future Trips to Canada

# Factors Influencing Destination Choice

- ▶ Destination safety, the availability of interesting outdoor experiences, and a longstanding desire to visit are the top factors influencing UK travellers to choose Canada as a holiday destination.
- ▶ Outdoor experiences, cultural experiences, and the opportunity to relax have all decreased in importance as reasons to choose Canada since 2020.



▲ / ▼ Significantly higher/lower than 2020 GTW wave.

+ New statement in 2021 GTW – no trending.

Base: Long-haul pleasure travellers (past 3 years or next 2 years) considering Canada (n=613)

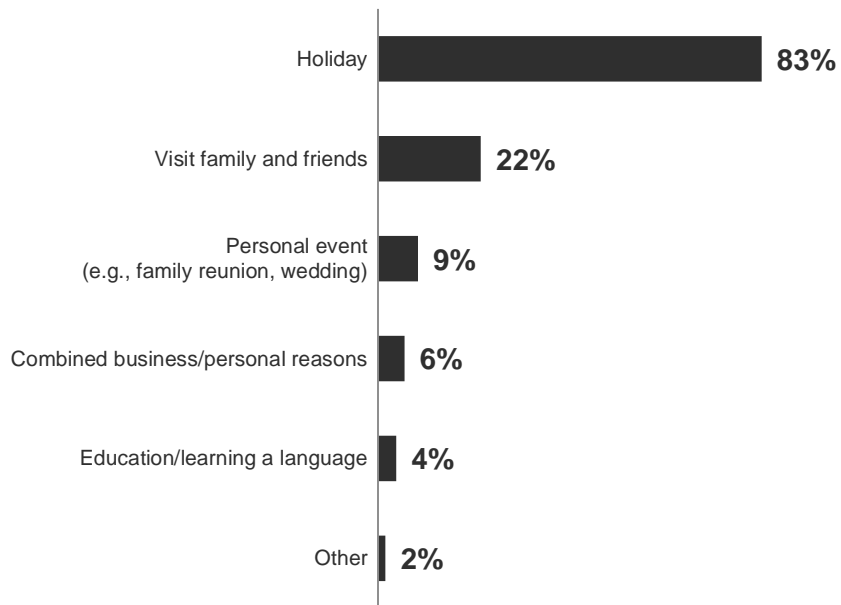
FT3. Which of the following would factor into your choice to travel to Canada? (Select all that apply)



# Main Purpose and Travel Party of Future Trip

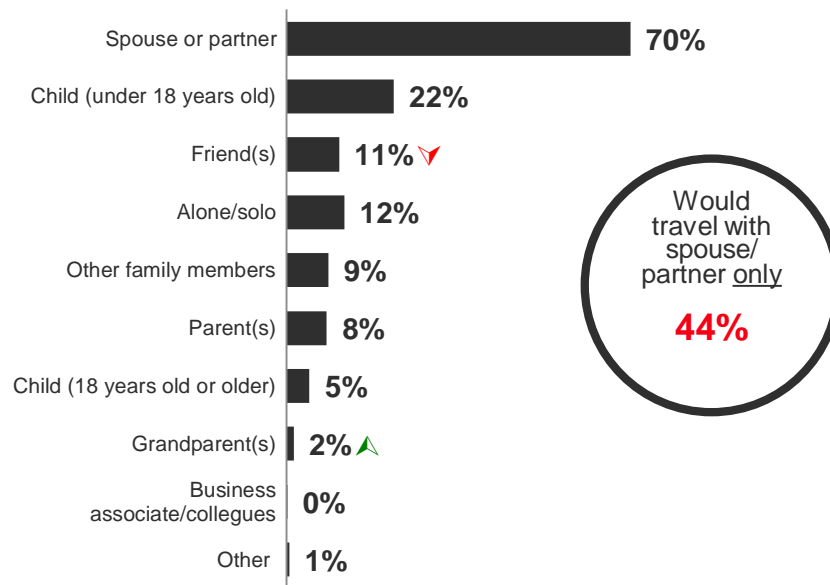
- ▶ Holiday trips will drive UK travel to Canada in the next 2 years, with VFR travel (trips to visit friends and relatives) also playing an important role.
- ▶ UK travel parties visiting Canada will be largely be made up of immediate family – primarily couples trips or family trips with children. Intent to travel with friends on a trip to Canada has declined since 2020.

## Purpose of Trip



▲ / ▼ Significantly higher/lower than 2020 GTW wave.

## Travel Party



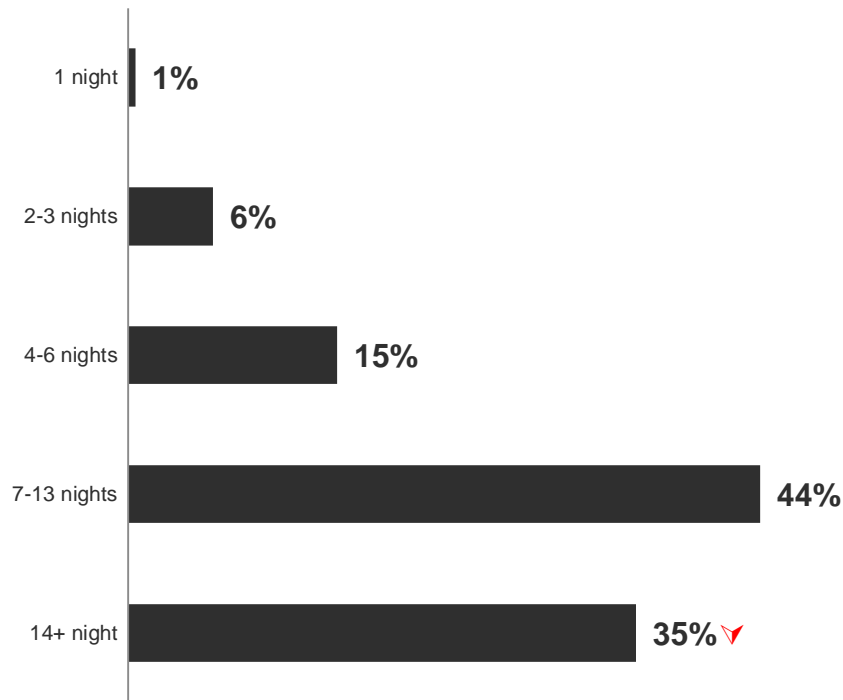
▲ / ▼ Significantly higher/lower than 2020 GTW wave.

Would travel with spouse/partner only

**44%**

# Length of Future Trip

- ▶ UK travellers typically would like to spend at least one week in Canada, with the highest preference for a trip of 1-2 weeks. While a considerable number of UK travellers are interested in spending more than two weeks on a trip to Canada, that number has dropped since 2020.



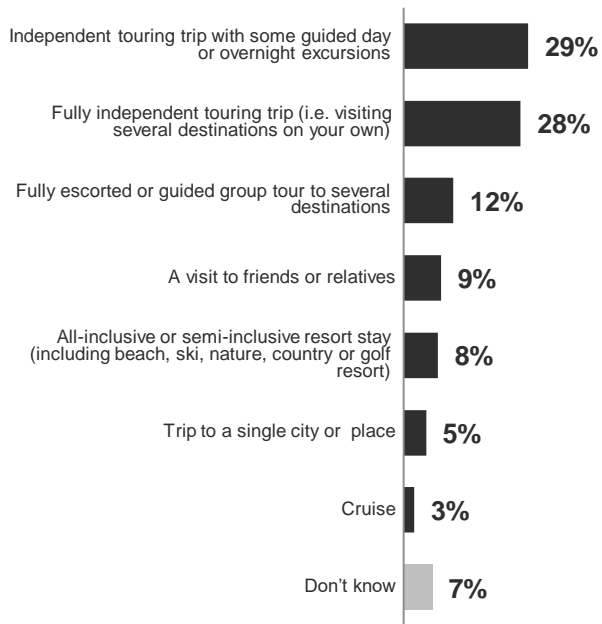
▲ / ▼ Significantly higher/lower than 2020 GTW wave.

Base: Long-haul pleasure travellers (past 3 years or next 2 years) considering Canada (n=613)  
FT4. How many nights do you think you would spend on a trip to Canada?

# Trip Type and Accommodation for Future Trip

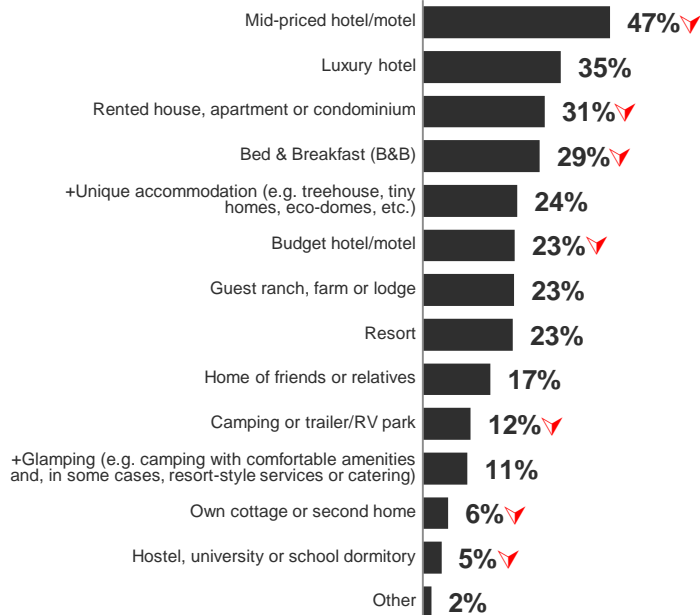
- ▶ Most UK travellers would prefer to travel independently on a trip to Canada, either with or without the addition of some guided excursions as part of the trip.
- ▶ Despite a decline compared to 2020, mid-priced hotels still stand out as the most preferred type of accommodation for a trip to Canada. Mentions of several other more budget-friendly types of accommodation have also declined in 2021.

## Trip Type



▲ / ▼ Significantly higher/lower than 2020 GTW wave.

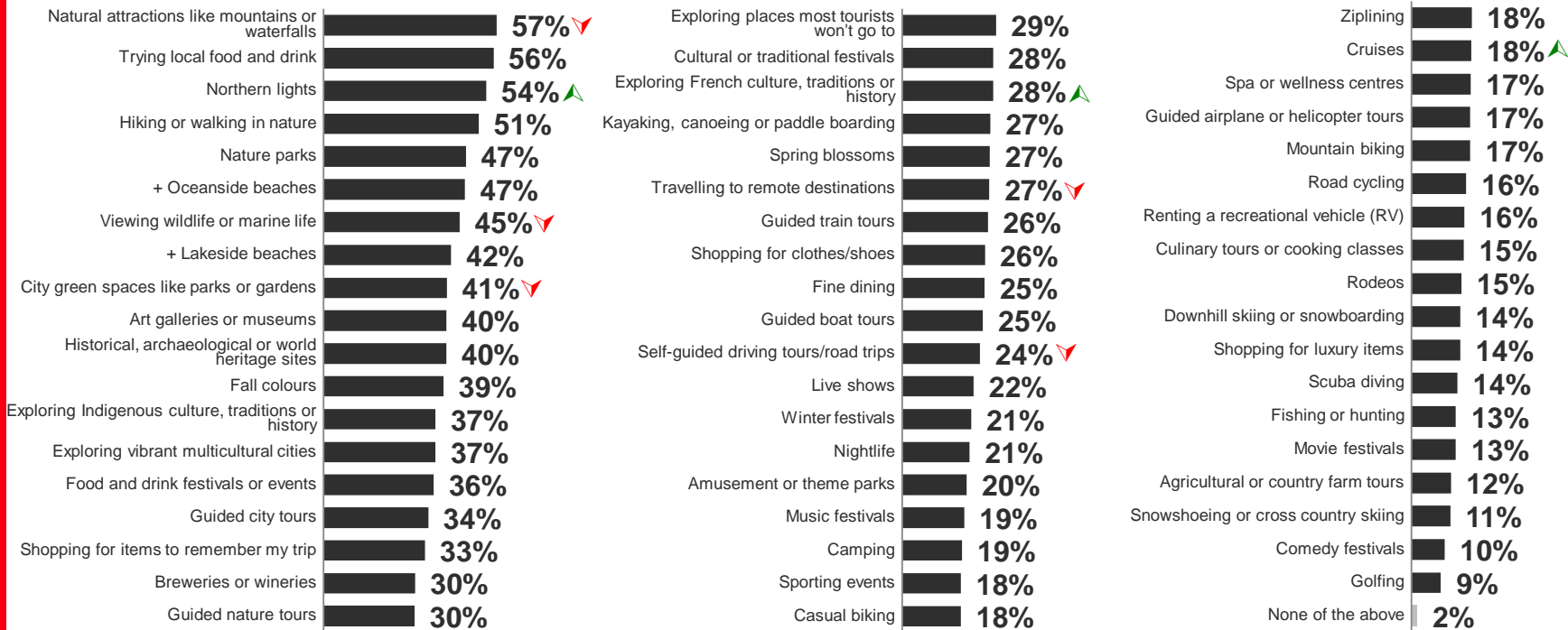
## Type of Accommodation



▲ / ▼ Significantly higher/lower than 2020 GTW wave.

# Activities Interested in on Future Trip to Canada

► While there is still a strong preference among UK travellers for nature-based activities on a trip to Canada, interest in some of those top activities has fallen relative to 2020. The exception is interest in the Northern Lights, which increased significantly in 2021 and is now the #3 activity of interest for a trip to Canada.



▲ / ▼ Significantly higher/lower than 2020 GTW wave.

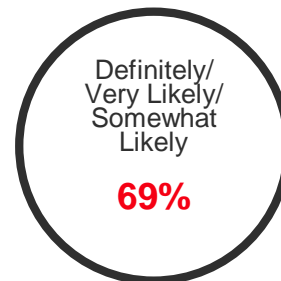
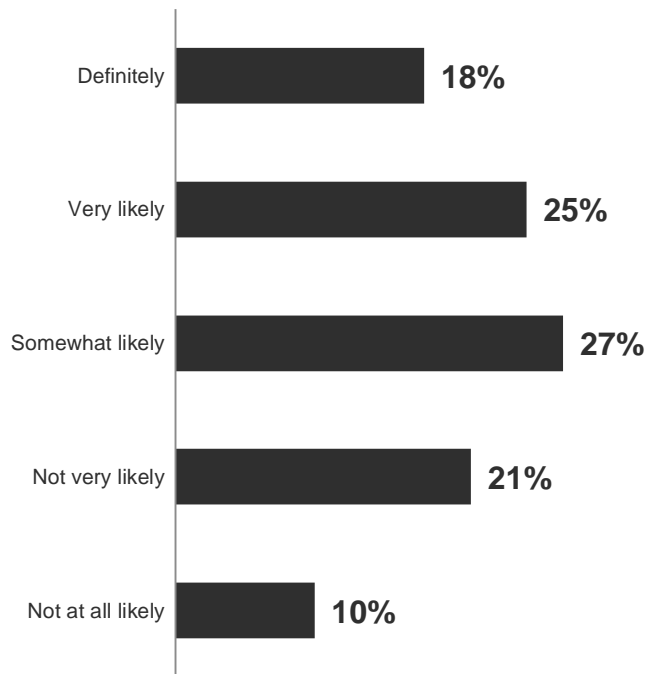
+ New statement in 2021 GTW – no trending.

Base: Long-haul pleasure travellers (past 3 years or next 2 years) considering Canada (n=613)

FT11. What activities would you be interested in participating in during a trip to Canada? (Select all that apply)

# Travel Agent Usage for Future

- ▶ Travel agents and tour operators play a substantial role in supporting travel from the UK to Canada, with a large majority of potential UK visitors indicating that they are likely to use a travel agent to research or book a trip to Canada.



▲ / ▼ Significantly higher/lower than 2020 GTW wave.

Base: Long-haul pleasure travellers (past 3 years or next 2 years) considering Canada (n=613)

FT6. 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. How likely are you to use a travel agent or tour operator to help you research or book a trip to Canada?