



Over 6 million UK long-haul leisure travellers intend to visit Canada in the next two years.

2018 Performance



2018 Arrivals<sup>1</sup>  
**791,550**  
(↓3.3%)



2018 Average Trip Spend<sup>2</sup>  
**\$1,477**

Key Insights

- Despite a slight decline in annual arrivals, the United Kingdom held the top spot as Destination Canada's largest long-haul market in 2018.<sup>1</sup>
- Over the first nine months of 2018, in spite of a 4% decline in total arrivals to Canada, United Kingdom holiday/leisure trips to Canada reached a five-year high of 292K visitors, up from 206K in 2013 and a previous peak of 274K in 2016.<sup>1</sup>
- Brexit concerns weighed on consumer confidence in the United Kingdom and acted as a drag on long-haul outbound travels for business trips and trips to visit friends and relatives.

2019 Forecast



Visitor Forecast<sup>2</sup>  
**795,510**  
(↑0.5%)



Spend Forecast (CAD)<sup>2</sup>  
**\$1.17 B**  
(↑2.1%)



Air Seat Capacity Growth<sup>3</sup>  
**↓2.3%**

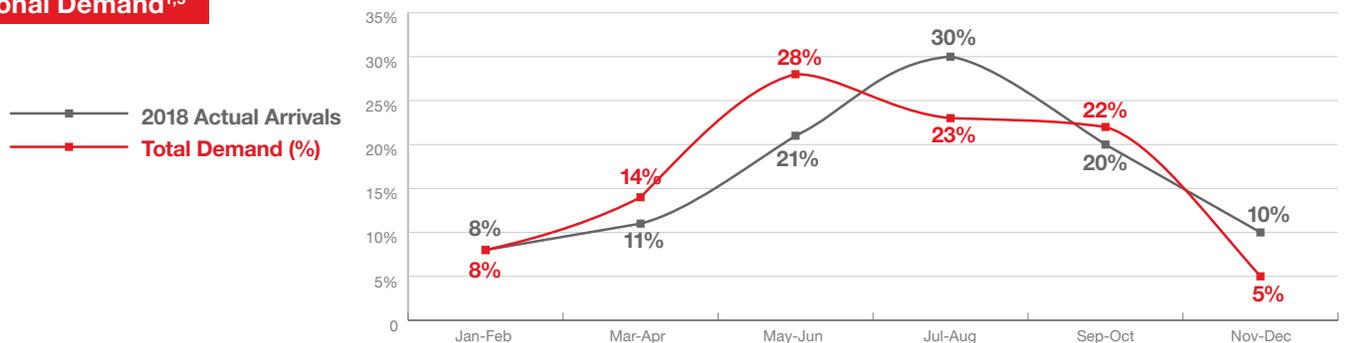


Local Currency vs. CAD<sup>4</sup>  
**↓4.4%**

Market Insights

- While UK arrivals to Canada in 2018 peaked in the summer months, demand for travel to Canada was the highest between May and June among leisure travellers.<sup>1,5</sup>
- Trying local food and drink, experiencing nature-based experiences, seeing historical or world heritage sites and exploring Indigenous culture are among the top activities UK leisure travellers want to experience while on holiday.<sup>5</sup>
- An increasing proportion of UK leisure travellers to Canada are booking organized group travel packages through a travel agent or tour operator (45%).<sup>5</sup>

Seasonal Demand<sup>1,5</sup>



<sup>1</sup> Statistics Canada, Frontier Counts, 2018.

<sup>2</sup> Destination Canada Research estimates, using Statistics Canada preliminary 2018 Q1-Q3 VTS, 2017 ITS Q4, Frontier Counts, National Tourism Indicators, Bank of Canada and visitor forecasts from Destination Canada 2019 Forecast.

<sup>3</sup> IATA SRS Analyzer Data, March 2018.

<sup>4</sup> Bank of Canada.

<sup>5</sup> Global Tourism Watch 2018.



Market Potential<sup>5</sup>



Canada's target market

14,851,000



42%

are definitely/very likely to visit Canada in the next 2 years



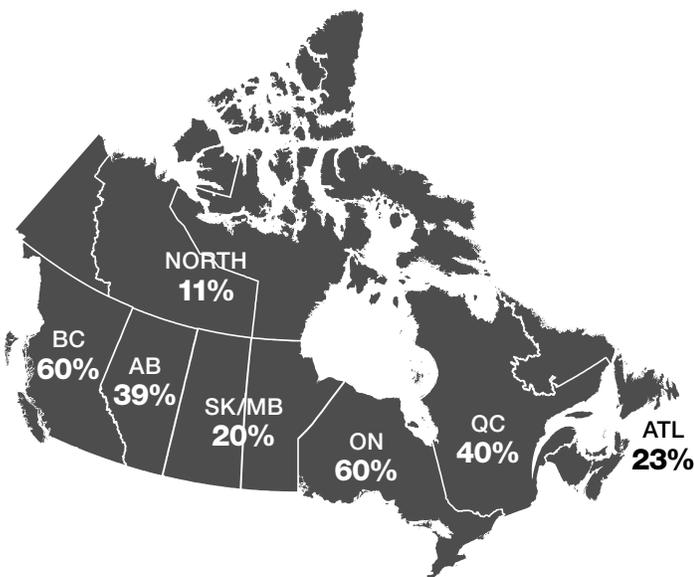
6,282,000

Canada's immediate potential

Top Drivers for UK Travellers to Any Destination<sup>5</sup>

- 1 Is a place I would be proud to tell people I have visited
- 2 Has great shopping
- 3 Is a place that allows me to de-stress
- 4 Offers adventures that everyone can enjoy
- 5 Has people that are friendly and welcoming
- 6 Has great dining and food experiences
- 7 Is a great place for touring around to multiple destinations
- 8 Its cities have a lot of great attractions to see and do
- 9 Is a safe place to visit
- 10 Is a place that provides intellectually stimulating travel experiences

Travel Consideration by Province, % Likely to Visit Region<sup>5</sup>



Travel Agent/Tour Operator Usage For Recent Trip to Canada<sup>5</sup>

Used for either research <u>or</u> booking	62%
Used for both research <u>and</u> booking	34%
Used for research <u>only</u>	14%
Used for booking <u>only</u>	14%

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<sup>5</sup> Global Tourism Watch 2018.