UK Market Highlights – Facts at a Glance

Almost 5 million UK long-haul pleasure travellers intend to visit Canada in the next two years.

### 2017 Performance

- **Arrivals\(^1\):** 801K (↓4%)
- **Average Trip Spend\(^2\):** $1,262

- While 2017’s arrivals fell short of 2016’s outstanding performance, the UK continued to be Canada’s 2\(^{nd}\) largest source of international tourists.

- This performance was underpinned by softening consumer confidence since May 2017, declines in purchasing parity, growing concerns over the future of the economy amidst Brexit negotiations, and tepid growth in air capacity.

### 2018 Forecast

- **Visitor Forecast\(^2\):** 825K (↑3%)
- **Spend Forecast\(^2\):** $1.11B (↑3%)

- **Airline Seat Capacity\(^3\):** ↑3%
- **Local Currency vs CAD\(^4\):** ↑0.2%

### Market Insights

- In 2017, Canada was ranked 3\(^{rd}\) on UK travellers’ list of long-haul countries to visit.\(^5\)

- In 2017, around 38\% of UK tourists visited for the purpose of pleasure and recreation, while 42\% visited to see family and friends.\(^2\)

- Ontario and British Columbia, followed by Alberta, represent the Canadian provinces that UK travellers say they will visit in the next two years.\(^6\)

### Travel Seasons\(^1\)

% of arrivals to Canada by month

- **United Kingdom**
- **Destination Canada Market Average**

### Channel Investment Mix

- **18\%** Travel Trade
- **82\%** Consumer Direct & Earned Media
**Market Potential**

14,221,000
Canada's target market

34%
are definitely/very likely to visit
Canada in the next 2 years

4,821,000
Canada’s immediate potential

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**Top Drivers**

The main features that British travellers desire in a destination are...

1. People are friendly and welcoming
2. Proud to tell people I have visited
3. Cities are great for exploring and soaking in the atmosphere
4. Great shopping
5. Touring around to multiple destinations
6. Spend quality time with friends and/or family
7. Good value for money
8. Allows me to de-stress
9. Beautiful outdoor scenery and landscapes
10. Cities have a lot of great attractions

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**Target Audiences**

**Free Spirits 25-34**

They are defined by the places they have travelled to and their experiences there. They want to visit cool places that will elevate their status.

**Key Themes**

Inspire with iconic and niche experiences that will make their experience in Canada unique and share-worthy.

- Uncovering hidden gems
- Discovering epic Canada
- Experiencing vibrant cities

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**Learners 55+**

They want to expand their world view by experiencing the world's natural beauty, and immerse themselves in new cultures and environments.

**Key Themes**

Showcase itineraries that connect UK travellers to lesser known experiences and destinations that let them live like locals.

- Connecting with the locals
- Experiencing Canada’s natural beauty
- Exploring regions, not singular destinations

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