



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

2018 Performance



2018 Arrivals¹
791,550
(↓3.3%)



2018 Average Trip Spend²
\$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 2018.¹
- 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 2016.¹
- 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 Forecast²
795,510
(↑0.5%)



Spend Forecast (CAD)²
\$1.17 B
(↑2.1%)



Air Seat Capacity Growth³
↓2.3%

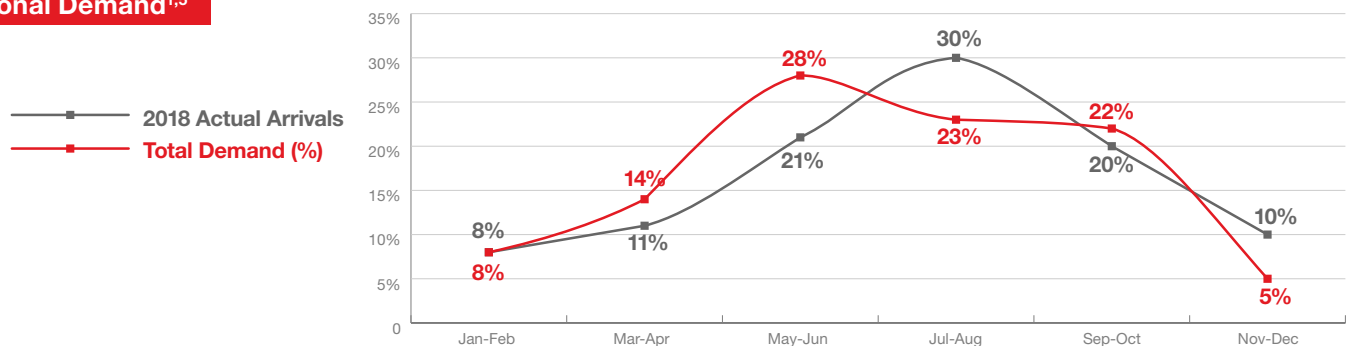


Local Currency vs. CAD⁴
↓4.4%

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.^{1,5}
- 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.⁵
- An increasing proportion of UK leisure travellers to Canada are booking organized group travel packages through a travel agent or tour operator (45%).⁵

Seasonal Demand^{1,5}



¹ Statistics Canada, Frontier Counts, 2018.

² 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.

³ IATA SRS Analyzer Data, March 2018.

⁴ Bank of Canada.

⁵ Global Tourism Watch 2018.



Market Potential⁵



Canada's target market

14,851,000



42%

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



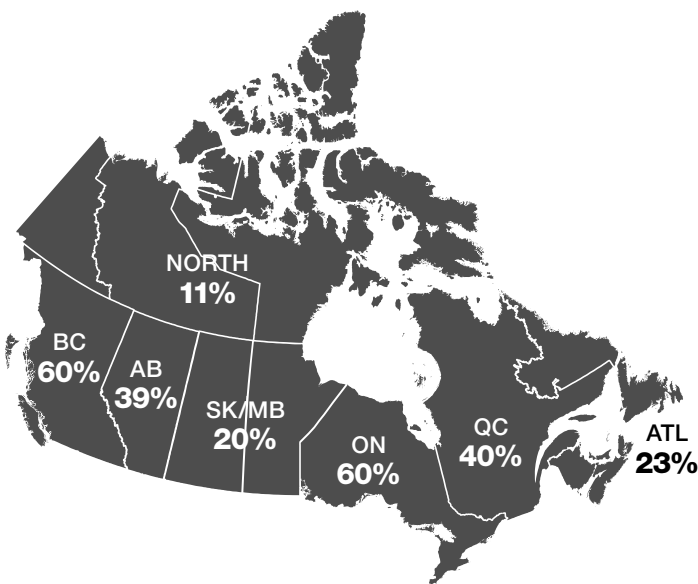
6,282,000

Canada's immediate potential

Top Drivers for UK Travellers to Any Destination⁵

- 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 Region⁵



Travel Agent/Tour Operator Usage For Recent Trip to Canada⁵

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%

For further information, please contact:

Rupert Peters
 Regional Managing Director, Europe and India
 T +44-207-389-9982
peters.rupert@destinationcanada.com

⁵ Global Tourism Watch 2018.