DESTINATION CANADA

Global Tourism Watch

2018 UK Public Summary Report

Canada

Enviro Foto

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Introduction

Destination Canada began conducting the annual Global Tourism Watch (GTW) program in 2007. The primary purpose of this research program is to provide consumer-based intelligence in 11 core markets around the world: Australia, China, France, Germany, India, Japan, Mexico, South Korea, the United Kingdom, the United States, and the domestic Canadian market.

The overall objectives of the GTW study are to:

- Monitor awareness, travel intentions, and other key market indicators for Canada and the regions;
- Assess perceptions of Canada and track brand performance against competitors over time;
- Identify the general experiences sought by travellers, and identify growth opportunities;
- Identify motivators and barriers for travel to Canada; and,
- Determine the influence of various information sources on destination selection.

The GTW permits direct comparison of Canada to competing destinations in each market. Destination Canada has designated the following destinations as competitors in the UK market: the US, India, Thailand, Australia, China, South Africa, Japan, Iceland, and New Zealand. The countries included represent 95% of the outbound travel volume to long-haul destinations which are considered direct competitors to Canada (e.g., non-beach destinations).

Questionnaire Changes

In 2018, questions were added in the following areas:

- Cost-related barriers to visiting Canada;
- Time of year of a potential visit to Canada; and,
- Sources of inspiration in destination selection.

Methodology

Data was collected via an online survey and has been weighted to represent the UK long-haul travel population. The target population in the UK was residents aged 18 years and older, who have taken a long-haul pleasure trip outside of Europe, North Africa and the Mediterranean 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.

Data was gathered from 1,503 respondents in the UK, including 301 recent visitors to Canada, in August 2018. Results are compared against previous GTW waves (data gathered in December 2016 and July 2017). In addition, select comparisons are made to the 2017 Pulse Check study conducted in November 2017. The Pulse Check is a shorter version of the GTW study, conducted to monitor movement of key metrics on a more frequent basis.

Throughout the report, statistically significant differences (95% confidence interval) from one wave to the next are denoted by arrows in the charts: green arrows pointing up if the metric has increased and red arrows pointing down if the metric has decreased. Results were also analyzed among different segments and demographic cohorts; throughout the report, references are made where there are statistically significant differences compared to the general traveller.

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

AUG

2018

Geographical Definition for Qualified Trips

Outside of: Europe, North Africa and the Mediterranean

GTW Sample Distribution

Sample distribution:	**National**
Recent visitors to Canada:	**301**
Other travellers:	**1,202**
Total sample size:	**1,503**

Background

The UK economy is currently ranked 5th among global economies, having overtaken France once again, and remains marginally ahead of India (*International Monetary Fund, October 2018).* The UK is set to exit the European Union in March 2019, however an agreement about the UK's future relationship with the European Union is in flux and negotiations were still underway at the time of data collection. While an exit from the European Union without an agreement is the most significant risk to the economy (*International Monetary Fund, November 2018),* economic growth is projected to increase slightly in 2019 on the assumption that there is a smooth exit from the European Union. However, some Brexit-related uncertainties will remain until there is clarity about future trading arrangements *(OECD, November 2018)*.

The timing of data collection for the 2018 Global Tourism watch was preceded by good weather, a Royal wedding, and a strong showing at the World Cup, which boosted consumer spending over the summer months. The UK economy expanded 1.2% year-over-year in Q2 2018 *(Trading Economics, August 2018)*.

At the time of data collection, fears over a no-Brexit deal sent the British pound to the lowest level of 2018 against both the US dollar and the Euro. The Pound to Euro exchange rate had fallen by 2.0%, while the Pound to Dollar exchange rate had fallen 4.5% *(Knight Frank, August 2018)*.

For the first time since the end of 2017, inflation rates picked up in July 2018, rising to 2.5% *(Trading Economics, August 2018)*. Inflation is projected to reach 2% by the end of 2020 *(OECD, November 2018).*

In August 2018, the UK unemployment rate held at 4.0% for the 3rd month in a row, 0.2 percent points lower than in the first quarter of the year, and at the lowest level since the 1970s *(Trading Economics, August 2018)*. A slight deterioration of labour market conditions is expected to increase the unemployment rate to 4.6% by the end of 2019 *(OECD, July 2018)*.

Consumer confidence stood at 50.4 in August 2018, up marginally from the 49.5 level observed both six months and one year ago *(Thomson Reuters / Ipsos Primary Consumer Sentiment Index, August 2018).*

UK residents took over 72 million trips abroad in 2017 and spending increased 3% to $71.4 billion US (*UNWTO, April 2018*).

Market Potential

HIGHLIGHTS

- ✓ *The immediate potential market rose to 6.28 million UK travellers in 2018, compared to 4.82 million in 2017, an increase of 1.46 million potential travellers.*
- ✓ *This increase in immediate potential is due to a significant increase in UK travellers definitely or very likely to visit Canada in the next 2 years (42%, up significantly from 34% in 2017).*
- ✓ *The long-haul travel outlook also recovered in 2018, rising significantly to +4 (up from -3 in 2017).*
- ✓ *UK travellers intending to visit Canada voice significantly more interest in visiting the Prairie provinces in 2018 (20%, up from 11% in 2017).*

GTW data is used to estimate the size of the potential market for Canada. The table below provides an estimate of the size of the potential UK market for Canada in two ways – the macro target market and the immediate potential market.

Size of Potential Market to Canada (Next 2 Years)

Measure	2016 GTW (Dec)	2017 GTW (Jul)	2018 GTW (Aug)
Long-haul pleasure travel market	19.70 million		
Target market for Canada (dream to purchase stage)	**70%**	**72%**	**75%**
Size of the target market	**13.75 million**	**14.22 million**	**14.85 million**
Immediate potential for Canada (definitely/very likely to visit in next 2 years[1])	**35%**	**34%**	**42%** ▲
Size of the immediate potential	**4.87 million**	**4.82 million**	**6.28 million**
Actual visitation	**833,329**	**818,198**	**791,550**

▲ / ▼ Significantly higher/lower than 2017 GTW wave.

[1] 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); Immediate potential for Canada = dream to purchase stages for P2P for Canada

QMP1. Which of the following best describes your current situation when thinking about each of the following destinations for a holiday trip?
QMP6. Realistically, how likely are you to take a holiday trip to Canada in the next 2 years?

The long-haul travel market size is derived from a 2016 omnibus study of the UK adult population. Long-haul travel incidence is comprised of travellers who indicate that they have travelled for a long-haul pleasure trip in the past three years or intend to do so in the next two years.

The proportion of GTW respondents who are in the dream to purchase stages for Canada is stable year-over-year (75% vs. 72% in 2017); however, it is up significantly from 2016 (70%). Based on the 2018 result, the size estimate for long-haul UK travellers is 14.85 million, up from 14.22 million in 2017 and 13.75 million in 2016. This result shows that Canada is expanding its overall base of interested travellers in the UK market.

The immediate potential is a more conservative estimate based on GTW respondents who say they are definitely or very likely to visit Canada in the next two years. The 42% result in 2018 is a significant increase from 34% in 2017 and 35% in 2016 – this suggests that there is an increase in urgency to visit Canada in 2018. There are 6.28 million travellers with immediate potential for conversion in 2018, an increase of 1.46 million potential UK travellers (compared to 4.82 million potential travellers in 2017).

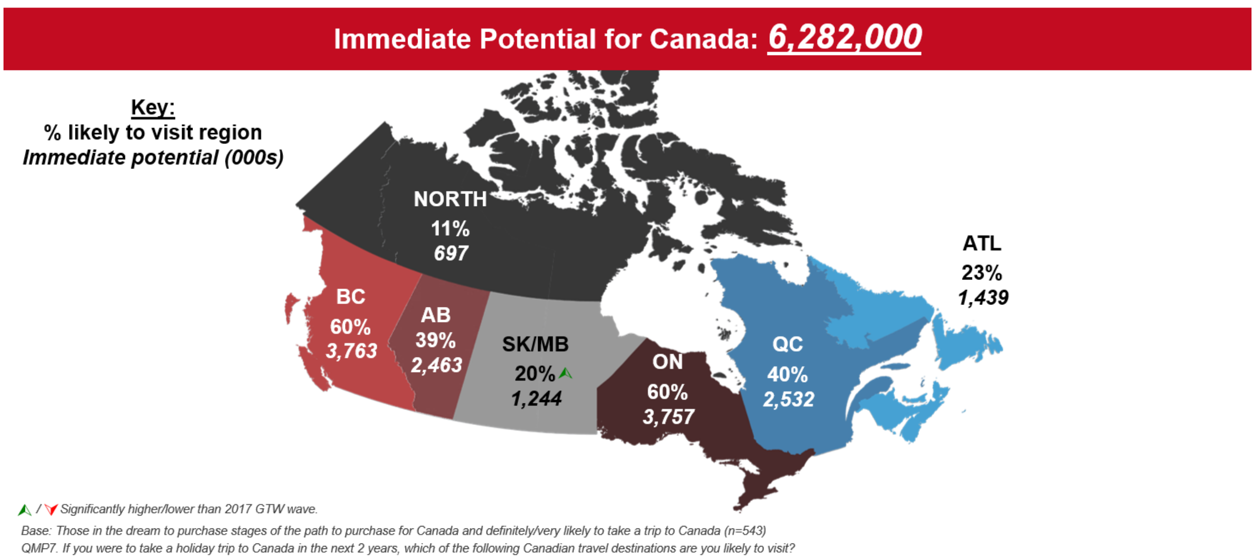
Among Destination Canada's ten international markets, the UK was ranked 4th in immediate potential market size (behind the US, China, and South Korea). However, actual visitation from the UK was ranked 2nd among Destination Canada's international markets in 2018. This means that Canada is continuing to do well at converting potential travellers to actual visitors in the UK market.

For context, Canada attracted 792,000 visitors from the UK in 2018, down 3% from the 818,000 UK visitors in 2017[1]. The 792,000 arrivals represent 13% of the immediate potential market.

Also of interest is the demonstrated interest in Canada's regions among the immediate potential market (6.28 million). Ontario and BC both have interest from 60% of the immediate potential market (3.76 million visitors each). Quebec (40%) has surpassed Alberta (39%) as the next most likely province to visit.

There are signs of growing interest in visiting the Prairies (Saskatchewan/Manitoba) among UK travellers, with interest up significantly in 2018 (20%, up from 11% in 2017). This translates into a potential market of 1.2 million in 2018 compared to 500,000 in 2017. Interest in the Prairies is strongest among younger travellers aged 25-34 years and is significantly higher than older travellers aged 55+ (28% versus 14%).

Potential Market Size for the Regions



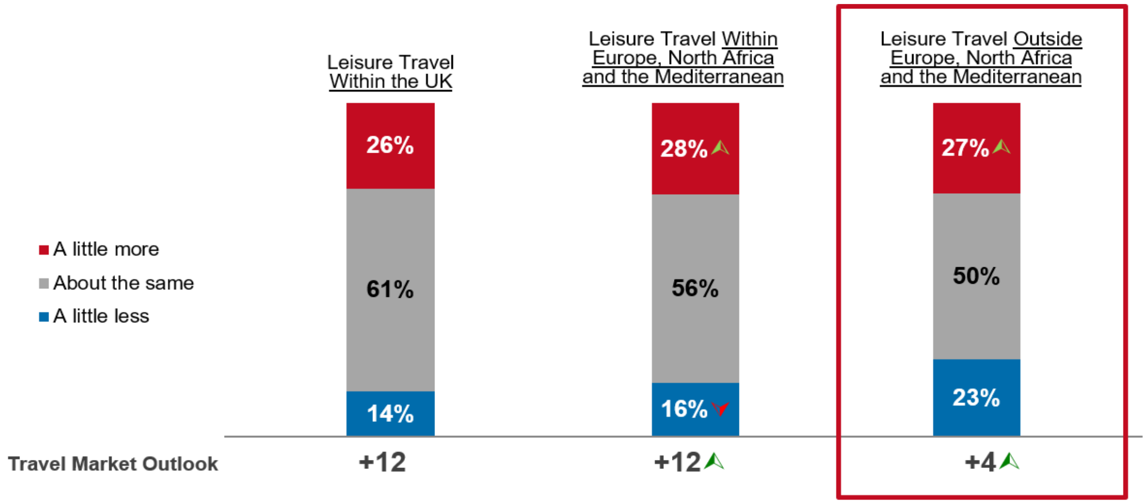
Despite the ongoing uncertainty surrounding Brexit, long-haul travel intentions rebounded in 2018. There is a significantly higher proportion of UK travellers reporting that they intend to spend more on long-haul travel in 2018 compared to 2017, resulting in a long-haul outlook of +4, up significantly from -3 in 2017.

The short-haul travel outlook is also on the upswing, increasing significantly from +2 in 2017 to +12 in 2018. Younger travellers aged 18-34 are the most bullish on short-haul travel, with a market outlook of +17, significantly higher than older travellers aged 55+ (+7).

The market outlook for domestic travel (+12) is unchanged compared to 2017.

[1] *Destination Canada, Tourism Snapshot, December 2018.*

Spending Intentions (in the Next 12 Months)



/ Significantly higher/lower than 2017 GTW wave.
Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=1503)
QS2. 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 …?

Competitive Environment – Key Performance Indicators Summary

HIGHLIGHTS

- ✓ *Unaided consideration of the US continues to slide (28%, dropping from 31% in 2017 and significantly from 39% in 2016).*
- ✓ *Japan is posing a stronger threat to Canada in 2018, recording significant increases in unaided and aided consideration. In addition, Japan's Net Promoter Score (NPS) result improved significantly and has moved ahead of Canada.*
- ✓ *China and India are also strengthening their positions in the UK market, with significant increases in destination knowledge and NPS.*
- ✓ *Growing knowledge of other competitive destinations has relegated Canada to 8th spot on aided destination knowledge (down from 6th in 2017).*

The GTW tracks the following Key Performance Indicators (KPIs) for Canada: unaided and aided destination consideration, aided destination knowledge, and Net Promoter Score (NPS). Canada's performance is tracked against key competitors for the long-haul travel market. For the UK, these are the US, India, Thailand, Australia, China, South Africa, Japan, Iceland, and New Zealand.

The outlook for Canada in the UK remains favourable. Out of the 10 competitive destinations that respondents were asked to evaluate, Canada is tied with Australia for 2nd on unaided consideration (behind the US) and also 2nd to the US on aided consideration. However, Canada's position on destination knowledge has fallen to 8th (down from 6th in 2017), trailing the US, Australia, Thailand, India, China, South Africa, and Japan.

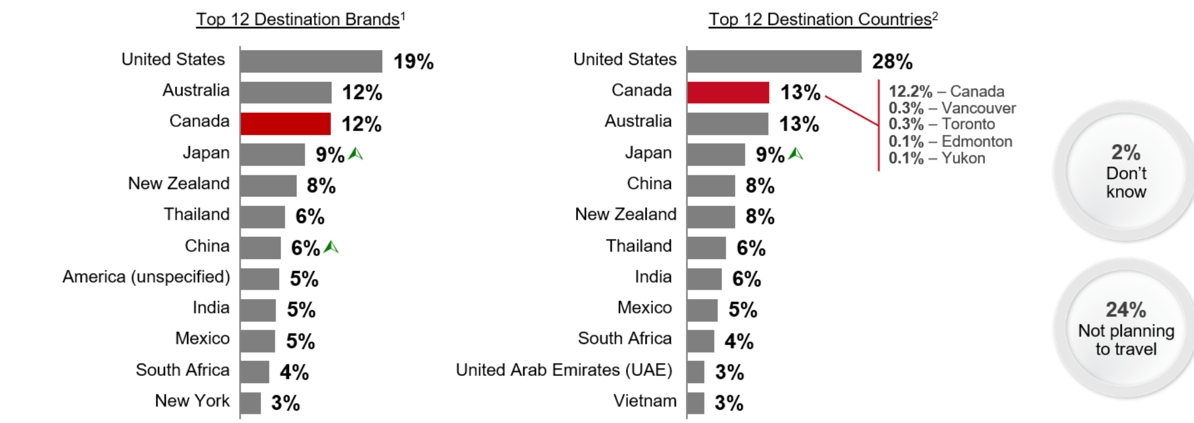
Consideration

Unaided consideration represents top-of-mind presence of destinations in the consumer mindset and requires travellers to think of destinations without being prompted. Unaided consideration indicates that a strong impression has rooted in the mind of a traveller for a destination. From a marketing perspective, travellers who have Canada on their unaided consideration list may be easier to attract since they are actively thinking of Canada as a travel destination.

On an unaided basis, 13% of UK travellers mentioned Canada as a destination under serious consideration in the next 2 years, up marginally from 2017 and 2016 (12%). Canada is tied with Australia on this metric but continues to trail the US by a large margin. Of note, unaided mentions of the US continue to slide (28%, dropping from 31% in 2017 and significantly from 39% in 2016). Given that unaided consideration for Canada is stable, Canada has not benefitted from the decrease in unaided consideration from the US; Japan had a significant increase in mentions in 2018 (9%, up from 6% in 2017 and 2016), but no other destinations have capitalized on the US decline.

Those who have visited Canada recently remain more likely to mention Canada on an unaided basis (36%). UK long-haul travellers continue to mention very few specific places in Canada, suggesting knowledge of specific Canadian destinations remains low.

Unaided Long-Haul Destination Consideration (Next 2 Years)



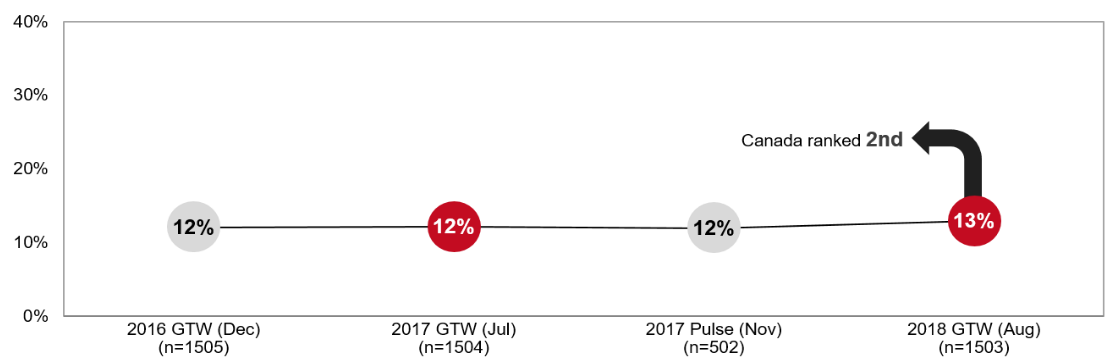
/ Significantly higher/lower than 2017 GTW wave.

[1] Responses as mentioned by respondents (e.g., percentage who said "Canada" specifically).
[2] 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=1503)

QS8. 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.)

Unaided Long-Haul Destination Consideration (Next 2 Years) – Canada Trended



/ Significantly higher/lower than 2017 GTW wave. / Significantly higher/lower than 2017 Pulse wave.

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

QS8. 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 consideration represents the proportion of travellers who say they would seriously consider visiting a destination, but only after they are prompted with a list of competitive destinations. Travellers who have aided consideration for Canada may not be thinking of Canada top-of-mind, but they are considering a visit. Continued prompts and cues through marketing efforts could help move these considerers down the Path-to-Purchase.

On an aided basis, 44% say they are seriously considering Canada for a leisure trip in the next 2 years, consistent with 2017 and 2016. Canada remains in 2nd place behind the US (59%) and substantially ahead of 3rd place Australia (33%). Japan saw significantly improved aided consideration results in 2018 (27%, up from 21% in 2017 and 23% in 2016), again signaling increasing interest in the destination among UK travellers.

Both recent visitors to Canada and those considering a visit rank Canada first overall in aided consideration among all destinations in the competitive set. Knowing that past visitors are more interested in returning, it is important to attract new visitors, with younger travellers continuing to represent a greater long-term opportunity.

Knowledge

Thirty percent of all UK travellers rate their knowledge of travel opportunities in Canada as either excellent or very good, trending up from 26% in 2016 and 2017. Among those considering Canada, destination knowledge stands at 39%, also increasing marginally from 2017 (37%) and 2016 (36%). Knowledge of Canada travel opportunities is highest among younger travellers aged 25-34 (46%).

Among those considering each competitive destination, knowledge of several destinations rose significantly, notably India (42%, up significantly from 33% in 2017) and China (40%, up from 30% previously). Canada has slipped to 8th spot, behind the US (57%), Australia (47%), Thailand (42%), India (42%), China (40%), South Africa (40%), and Japan (40%).

Knowledge of travel opportunities in Canada steadily rises as travellers move down the Path-to-Purchase: 22% of those in the dreaming stage are knowledgeable about Canadian travel opportunities, moving up to 38% in the considering stage, and further to 56% among those actively planning a visit. Efforts to boost knowledge of Canadian travel opportunities could pay off by helping to move potential visitors along the path-to-purchase.

Key Performance Indicators

Key Performance Indicators (KPIs) for Canada – Summary

Indicator	Definition	All Long-Haul Travellers (n=1503)	Recent Visitors to Canada[1] (n=301)	Considering Canada[2] (n=619)
Intentions:				
Unaided destination consideration	% who mentioned Canada or a destination in Canada on their consideration list[3]	**13%**	**36%**	**29%**
Competitive positioning on destination consideration	Rank on the consideration list among 10 destinations	**2**	**1**	**1**
Destination knowledge:				
Aided awareness of travel opportunities in Canada	% with excellent/very good knowledge of travel opportunities in Canada	**30%**	**64%▲**	**46%**

▲ / ▼ Significantly higher/lower than 2017 GTW wave.

[1] Visited Canada in the past 3 years (pleasure trip of 4 or more nights, with at least 1 night in paid accommodations).

[2] Those in the consider to purchase stages of the path to purchase for Canada.

[3] For trips in the next 2 years.

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

QS8. 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.)
QBVC1. You may have already mentioned this before, but which destinations would you seriously consider visiting in the next 2 years?
QMP3. How would you rate your level of knowledge of holiday opportunities in each of the following destinations? (asked among all respondents)

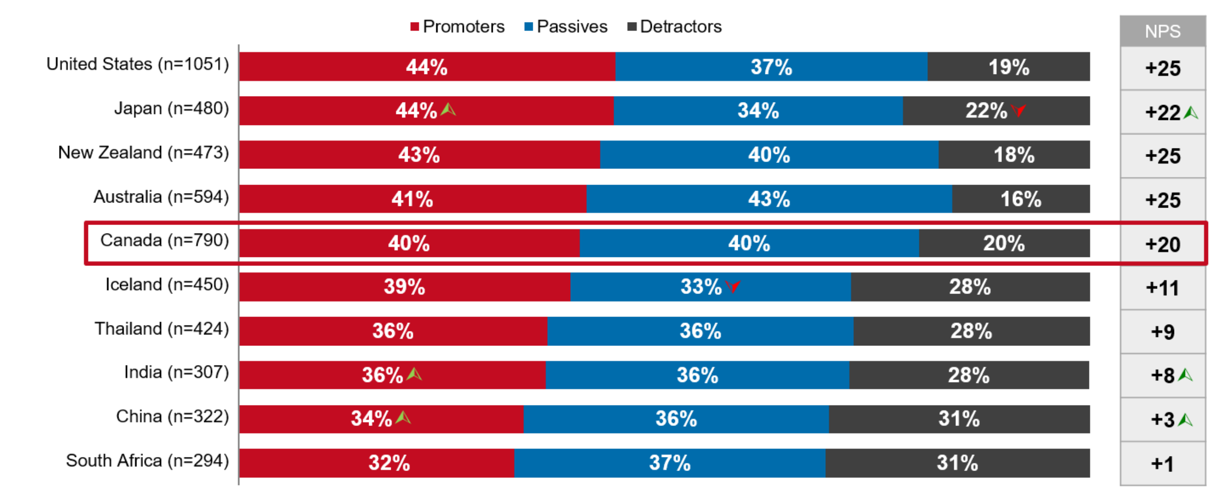
Net Promoter Score (NPS)

The Net Promoter Score (NPS) measures the likelihood of travellers to recommend a destination. Results are gathered among travellers with each destination in their consideration set (have visited previously and/or considering a visit). The measure has an 11pt scale (0-10). The score is calculated by subtracting Detractors (0-6 rating) from Promoters (9-10 rating). Passives are those who provided a rating of 7-8.

The US, Australia, and New Zealand achieved the highest NPS result (+25) among UK travellers in 2018. The US and New Zealand have slightly more Promoters than Australia, but also have more Detractors. Japan has seen a positive shift in its NPS results, with significantly more Promoters (44%, up from 34% in 2017) and fewer Detractors (22% down significantly from 29% in 2017). These shifts have resulted in a NPS result of +22 for Japan, up significantly from +5 in 2017. Canada's performance is relatively constant at +20 (compared to +17 in 2017). India and China both recorded significantly more Promoters in 2018, resulting in significantly improved NPS results: India stands at +8, up from -11 while China is at +3, up from -14 in 2017. All destinations in the competitive set now have positive NPS results, with South Africa being the lowest at +1.

When the results for Canada are examined among past three year visitors, the NPS result rises to +49, up significantly from 2017 (+39); among those who have not visited Canada in the past 3 years, the NPS result is -15. This strongly underscores the opportunity to capitalize on advocacy from recent visitors as well as encouraging them to return. Among those who have ever visited Canada, the NPS result is +19, which is significantly lower than that of past three year visitors – this indicates the need to develop strategies that encourage visitors to advocate either during or immediately after a trip to Canada.

Net Promoter Score



/ Significantly higher/lower than 2017 GTW wave.

Base: Long-haul pleasure travellers (past 3 years or next 2 years) considering visiting each country

QMP11. Whether you have visited or not, how likely are you to recommend each of the following holiday destinations to a friend, family member or colleague?

Path-to-Purchase

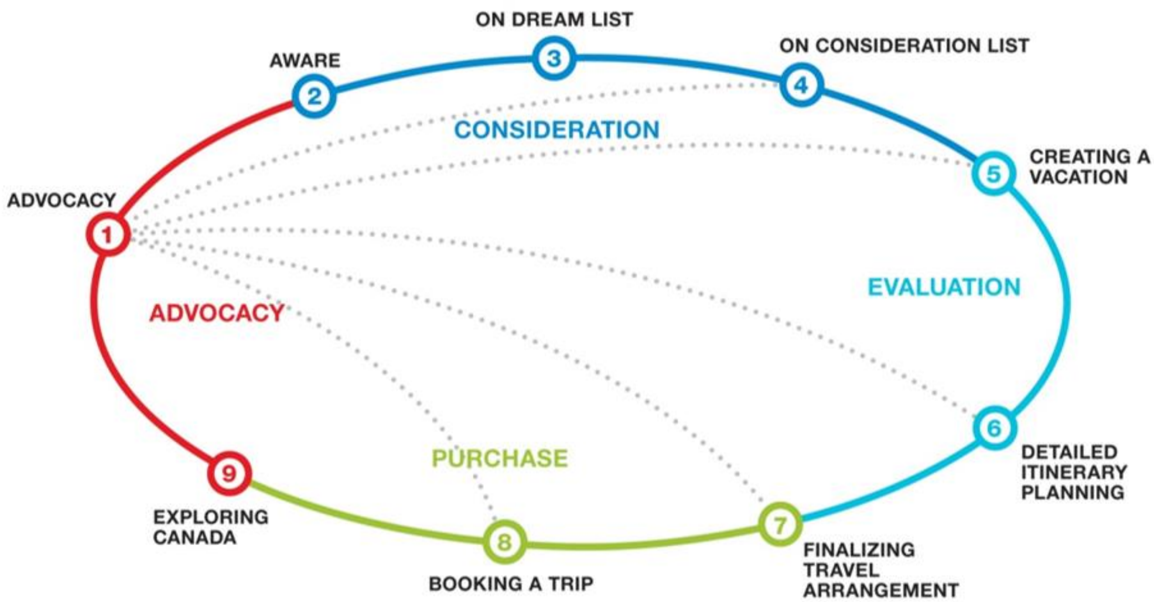
HIGHLIGHTS

- ✓ *UK travellers are more likely to be in the active planning stage for Canada, recording a significant increase in 2018 compared to previous years.*
- ✓ *Iceland, China, India, and Thailand also saw significant increases in active planning in 2018.*
- ✓ *Strong improvements in conversion rates in 2018 indicate that Canada has been more successful in retaining UK travellers into the lower parts of the Path-to-Purchase.*

Like any other expensive and discretionary consumer product, 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. Advocacy happens during and after the actual visit. As evidenced from the NPS results, recent Canada visitors are most likely to be Promoters, making it important to encourage recent visitors to share experiences.

Destination Canada wants to understand where the organization can have the greatest influence in converting those with interest in Canada to actual visitors.

Destination Canada's Path-to-Purchase Model



In addition to looking at individual stages of the P2P, Destination Canada has identified phases travellers move through in the purchase cycle. Key phases are defined below and are referenced throughout this report.

Destination Canada's Path-to-Purchase Model

Unaware	Have never thought of taking a trip to this destination
Aware	Not interested in visiting/returning in the foreseeable future
On Dream List	Dreaming about visiting/returning someday
On Consideration List	Seriously considering visiting/ returning in the next 2 years
Creating a Vacation Movie	Have started to gather some travel information for a trip to this country
Detailed Itinerary Planning	Am planning the itinerary for a trip to this country
Finalizing Travel Arrangements	Am currently making transportation and accommodation arrangements
Booking a Trip	Have already booked my transportation and accommodations

Dream to Purchase

Consider to Purchase

Active Planning

UK residents took a record 46.5 million overseas holidays in 2017, one million more than the previous high of 45.5 million a decade ago[2]. As a consequence of this renewed interest in travel, several competitive destinations recorded improved Path-to-Purchase results in 2018.

The US continues to lead in this area, with 28% of UK long-haul travellers actively engaged in planning a visit and a further 30% seriously considering a trip in the next 2 years. In 2018, the US recorded a significant increase in travellers at the booking stage (7%, up from 3% in 2017), suggesting that UK travellers may be returning to the US.

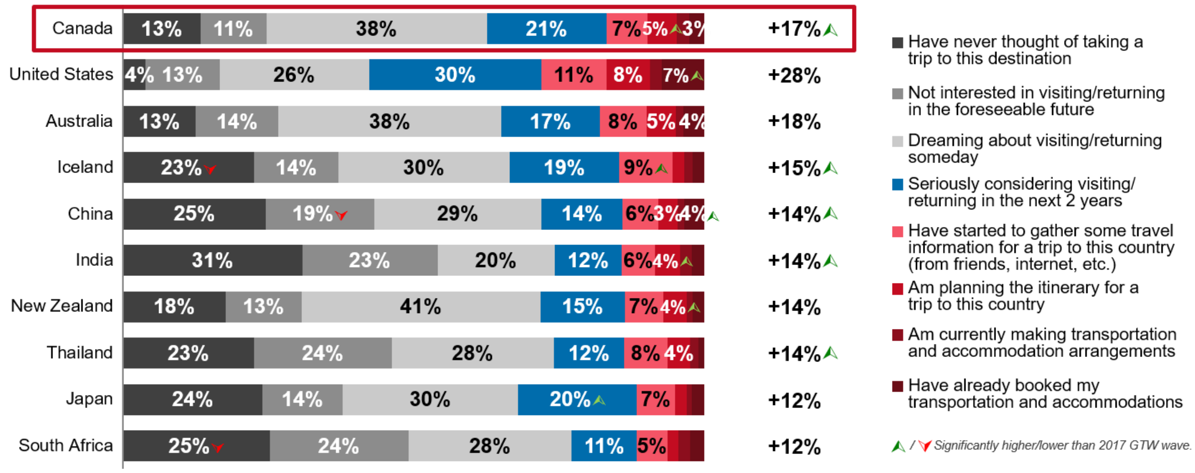
For Canada, 17% of UK travellers are actively planning a trip, up significantly from 12% in 2016 and 2017. Notably, 26% of younger travellers aged 25-34 are likely to be actively planning a trip to Canada, significantly higher than any other age group.

Canada and Australia have very similar Path-to Purchase results among UK travellers. While Canada continues to trail Australia in the active planning phase, it remains ahead of Australia at the seriously considering phase. It is possible that the Path-to-Purchase for Canada and Australia are similar because, as Commonwealth countries with similar cultures and exchange rates, UK travellers view these two destinations as alternative options. In 2018, Australia logged 733,000 arrivals from the UK and Canada recorded 792,000 UK travellers.

There are some trends to note with other destinations in the competitive set. Iceland saw a significant increase in active planning in 2018 (15%, up from 5% in 2017) while fewer have never thought of visiting (23%, down from 32%). China saw in a significant drop in the uninterested category (19%, down from 27% in 2017) and a corresponding increase in active planning (14%, up from 6%). Similarly, India (14%, up from 7% in 2017) and Thailand (14%, up from 9% in 2017) also have more UK travellers in the active planning phase. Additionally, Japan has significantly more travellers seriously considering a visit relative to 2017 (20%, up from to 11%). These results suggest that UK travellers are actively considering a range of destinations for upcoming holiday trips, with Asian destinations posing an increasing threat.

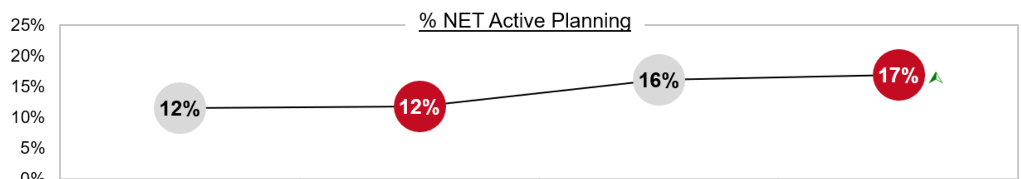
[2] *Travel Weekly, March 29, 2018.*

Stage in the Purchase Cycle by Country



Base: Long-haul pleasure travellers (past 3 years or next 2 years) – note all respondents evaluated Canada plus 2 randomly selected countries from the competitive set (n=varies)
QMP1. Which of the following best describes your current situation when thinking about each of the following countries for a holiday trip?

Stage in the Purchase Cycle – Canada Trended



	2016 GTW (Dec) (n=1505)	2017 GTW (Jul) (n=1504)	2017 Pulse (Nov) (n=502)	2018 GTW (Aug) (n=1503)
Have never thought of taking a trip to this destination	17%	15%	15%	13%
Not interested in visiting/returning in the foreseeable future	13%	13%	13%	11%
Dreaming about visiting/returning someday	36%	39%	34%	38%
Seriously considering visiting/returning in the next two years	22%	21%	23%	21%
Have started to gather some travel information for a trip to this country	6%	7%	8%	7%
Am planning the itinerary for a trip to this country	4%	3%	5%	5%
Am currently making transportation and accommodation arrangements	1%	0%	1%	2%
Have already booked my transportation and accommodations	1%	2%	2%	3%

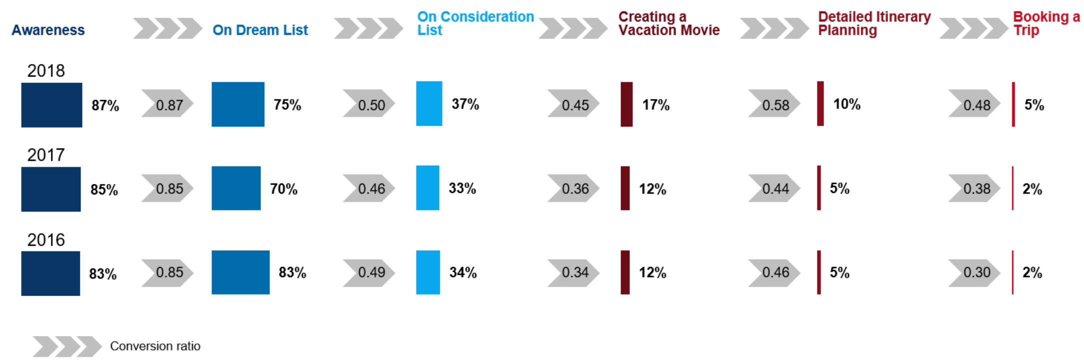
/ Significantly higher/lower than 2017 GTW wave. / Significantly higher/lower than 2017 Pulse wave.
Base: Long-haul pleasure travellers (past 3 years or next 2 years)
QMP1. Which of the following best describes your current situation when thinking about each of the following countries for a holiday trip?

Getting travellers to move through the purchase cycle to booking a trip is critical. The charts below show Canada's progress converting travellers at crucial steps in the purchase cycle relative to top competitors. For reference, also shown is the average across the entire competitive set. 'Strong' and 'weak' conversion ratios were derived through statistical analysis; specifically, if a conversion ratio is greater than one standard deviation from the average, then it is considered 'strong' and if a conversion ratio is lower than one standard deviation from the average, then it is marked as 'weak'.

At the dreaming stage, Canada's performance remains above average in 2018. The proportion (87%) is up marginally year-over-year and Canada's performance at this stage continues to be 'strong' compared to the competitive average in 2018. Canada's performance remains weakest at converting travellers from the consideration phase to creating a vacation movie – this continues to be a potential area of focus for Canada. Travellers at this stage are seeking to put some type of framework around a trip concept and are looking for guidance on what the best itinerary might be. Travellers need to have an idea of the core concept of their trip before they can move ahead.

It is notable that 2018 conversion rates are generally higher than previous years across all stages of Canada's Path-to-Purchase. The largest increases in conversion over 2017 are between the lower stages of the Path-to-Purchase: consideration to creating a vacation movie (+9%), creating a vacation movie to detailed itinerary planning (+14%), and detailed itinerary planning to booking (+10%). This indicates that Canada has been more successful than previous years at retaining UK travellers into the lower parts of the purchase cycle and suggests that there is prospect for increased UK arrivals in subsequent years; if Canada is able to continue engaging with travellers in the lower stages, more potential UK travellers could convert into actual travellers.

Path-to-Purchase Conversion – Canada



Looking at conversion results among competitors, the US continues to excel at getting on travellers' consideration list. Previously average, the US also has above average performance in 2018 at converting UK travellers into the dreaming stage. At the final stage, booking a trip, the US remains ahead of all other destinations, converting 9% of prospective visitors to actual visitors, up from 5% in 2017. Thailand is above average at converting UK travellers from the consideration phase to creating a vacation movie but has below average conversion between the later stages. Japan, which is an emerging competitor for Canada, saw below average results between consideration to creating a vacation movie and creating a vacation movie to detailed itinerary planning. This suggests that UK travellers may be finding it difficult to build an idea of what a trip to Japan could look like.

For context, the US recorded 4.5 million arrivals from the UK in 2017 (down 2% from 2016), while Thailand saw 994,000 in 2017, Canada welcomed 792,000 in 2018 (down 3% from 2017), Australia logged 733,000 in 2018 (unchanged from 2017), Japan attracted 334,000 in 2018 (up 8% from 2017), and New Zealand saw 251,000 arrivals in 2017 (up 13%).[3]

[3] Destination Canada, US National Travel & Tourism Office, Department of Tourism Thailand, Tourism Australia, Japan National Tourism Association and Tourism New Zealand.

Path-to-Purchase Conversion – Top Competitors

	Awareness		On Dream List		On Consideration List		Creating a Vacation Movie		Detailed Itinerary Planning		Booking a Trip
Canada	87%	0.87	75%	0.50	37%	0.45	17%	0.58	10%	0.48	5%
United States	96%	0.87	83%	0.69	58%	0.49	28%	0.60	17%	0.55	9%
Australia	87%	0.84	73%	0.48	35%	0.52	18%	0.55	10%	0.49	5%
New Zealand	82%	0.84	69%	0.41	28%	0.49	14%	0.52	7%	0.42	3%
Thailand	78%	0.69	54%	0.48	26%	0.53	14%	0.46	6%	0.38	2%
Japan	76%	0.82	62%	0.51	32%	0.36	12%	0.44	5%	0.61	3%
Average among competitive set	*80%*	*0.79*	*63%*	*0.51*	*33%*	*0.48*	*16%*	*0.53*	*8%*	*0.53*	*4%*

Conversion ratio Weak Strong
Identified through statistical analysis

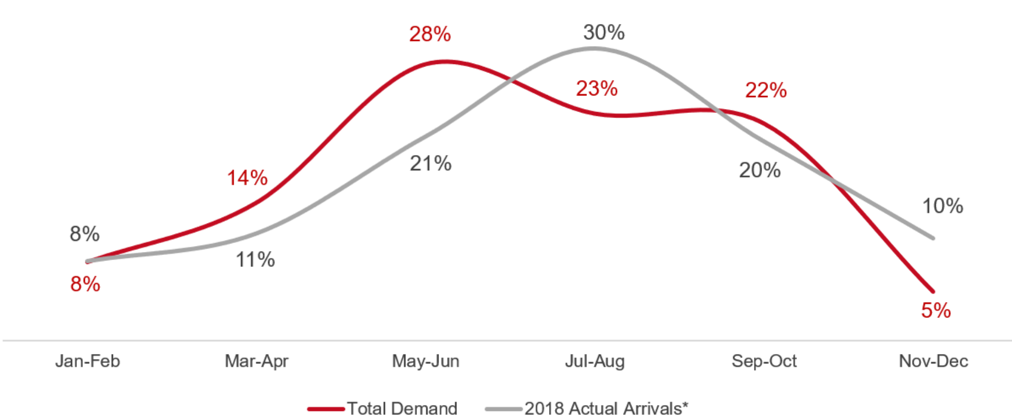
Time of Year Interest

HIGHLIGHTS

✓ *An opportunity exists to fill the May to June demand gap.*

A new question added to the Global Tourism Watch in 2018 asked prospective UK visitors which time of year they would consider visiting Canada. May to June (28%) is the most popular time of year, followed by July to August (23%) and September to October (22%). Compared to the distribution of actual UK arrivals in 2018, the largest gap in demand is for the months of May to June, where those interested (28%) are higher than those actually visiting (21%). Given compression issues in the peak July to August months, an opportunity exists to fill the May to June demand gap to relieve pressures.

Time of Year Interested in Visiting Canada (Next 2 Years) versus Actual Arrivals



** Source: 2018 StatsCan Frontier Border Counts.*
Base: Those in the dream to purchase stages of the path to purchase for Canada (n=1161); data re-based to create distribution of demand
QPC3. What time of year would you consider taking a vacation trip to Canada in the next 2 years?

Canadian Destination Interest

HIGHLIGHTS

- ✓ *There is growing interest in visiting the Prairie provinces, with Winnipeg, Saskatoon, and Regina seeing significant increases.*
- ✓ *Quebec City, Ottawa, Mont Tremblant, St. John's, and the Okanagan also saw significant increases in interest year-over-year.*
- ✓ *All significant increases in 2018 are among lesser known Canadian destinations, suggesting that these are emerging locales for UK travellers.*

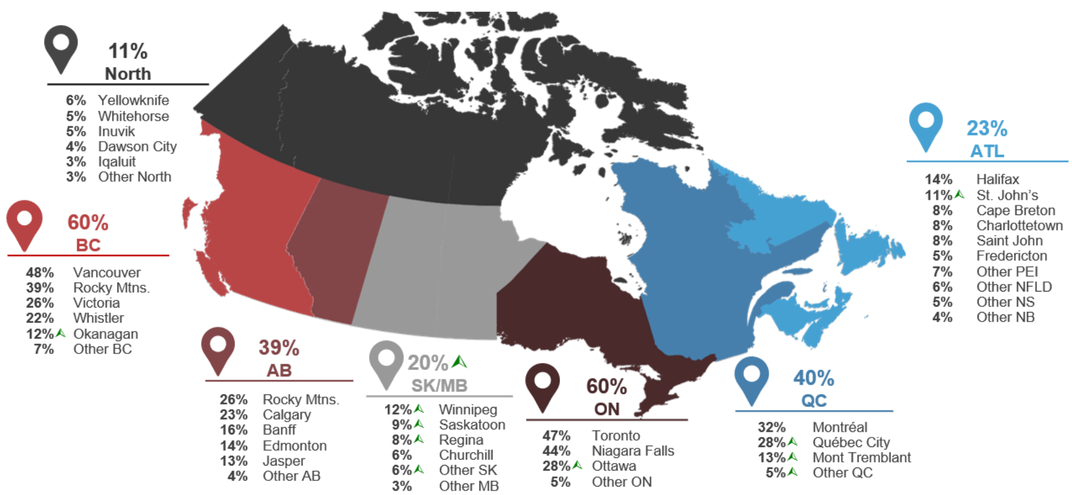
UK travellers in the dream-to-purchase stages and indicating they are definitely/very likely to visit Canada in the next 2 years were asked which parts of the country they would likely visit. Results are similar to 2017, with BC joining Ontario as the most popular province (60%). Interest in Saskatchewan/Manitoba is up significantly in 2018 (20%, up from 11% in 2017).

Although not a significant increase since 2017, Vancouver (48%) is now the most mentioned destination among UK travellers, marginally ahead of Toronto (47%) and Niagara Falls (44%). Montreal (32%), Quebec City and Ottawa (both up significantly to 28%) round out the most popular city destinations for UK travellers. Outside of urban destinations, the Rocky Mountains remain a top draw with 39% of probable visitors heading to BC for this experience and 26% saying they would go to Alberta.

There are several other significant shifts in likelihood to visit in 2018, with Winnipeg, Saskatoon, Regina, St. John's, Mont Tremblant, and the Okanagan seeing significant increases year-over-year. In the case of Winnipeg and Saskatoon, while increased interest in 2018 is significant over 2017, 2018 results are similar to 2016 and suggest a rebound from lower interest during 2017.

Of note, all significant increases are among lesser known Canadian destinations, suggesting that these are emerging locales for UK travellers. These destinations may be growing in popularity as UK travellers are dissuaded from visiting major destinations due to higher costs and compression issues in the peak July and August period, when nearly a third of UK arrivals take place.

Canadian Destinations Likely to Visit (Among those definitely/very likely to visit)

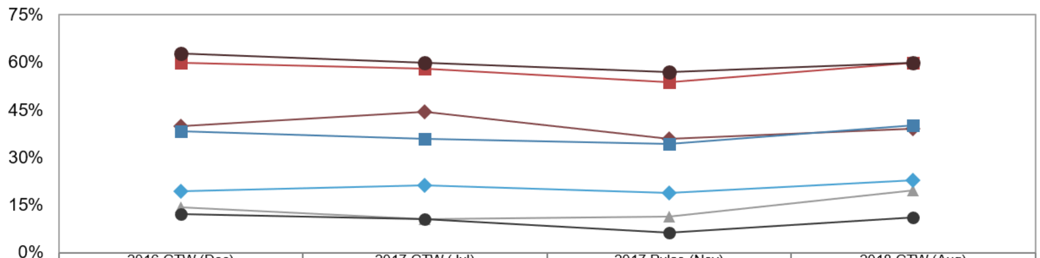


Base: Those in the dream to purchase stages of the path to purchase for Canada and definitely/very likely to take a trip to Canada (n=543)
QMP7. If you were to take a vacation trip to Canada in the next 2 years, which of the following Canadian travel destinations are you likely to visit?
QMP7a-g. Within [province/region], which travel destinations are you likely to visit?

▲ / ▼ Significantly higher/lower than 2017 GTW wave.

The trended results show that interest in individual provinces and regions has remained relatively consistent since 2016. The only change to note is the significant increase in visiting the Prairie provinces in 2018.

Canadian Destinations Likely to Visit – Provinces/Regions Trended



	2016 GTW (Dec) (n=425)	2017 GTW (Jul) (n=406)	2017 Pulse (Nov) (n=141)	2018 GTW (Aug) (n=543)
BC	60%	58%	54%	60%
AB	40%	45%	36%	39%
SK/MB	14%	11%	11%	20%
ON	63%	60%	57%	60%
QC	38%	36%	34%	40%
ATL	19%	21%	19%	23%
North	12%	11%	6%	11%

/ Significantly higher/lower than 2017 GTW wave. / Significantly higher/lower than 2017 Pulse wave.

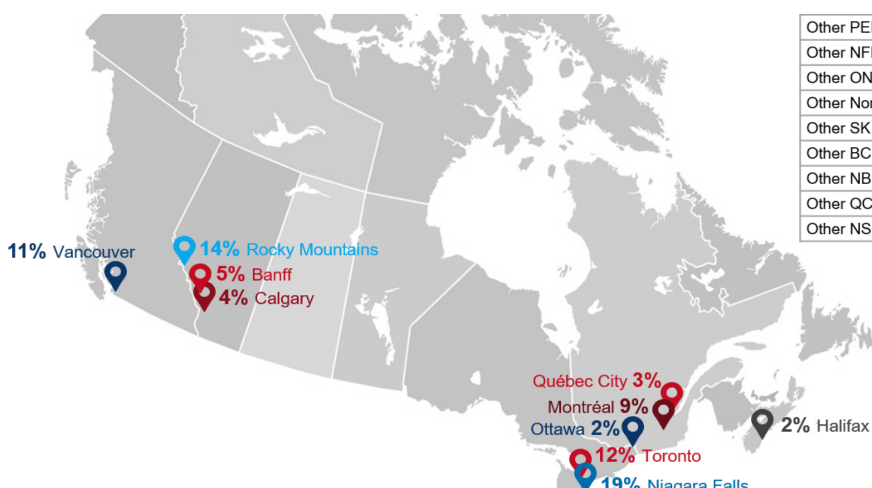
Base: Those in the dream to purchase stages of the path to purchase for Canada and definitely/very likely to take a trip to Canada

QMP7. 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?

An additional question asked potential visitors to identify the one Canadian destination holding the greatest appeal. Overall, Niagara Falls, selected by 19% of prospective visitors, has moved ahead of the Rocky Mountains (14%). While not significant, interest in the Rockies has dropped from 19% in 2017 to 14% in 2018. Toronto remains the most attractive city destination (12%), followed by Vancouver (11%) and Montreal (9%). Despite declining interest in the Rockies in 2018, results continue to suggest Canada's landscape-based icons (Niagara Falls and the Rocky Mountains) still hold greater appeal for UK travellers than city destinations. There continues to be an opportunity to use well known natural landscapes as anchors and highlight their proximity to cities and lesser known/desirable destinations to attract UK travellers. This is particularly true as interest in lesser known destinations such as the Prairies grows; sample itineraries could feature the Rockies and highlight the relative proximity of Prairie destinations.

Mont Tremblant (1%, up from 0% in 2017) and other BC regions (1% down from 2% in 2017) were the only destinations to see a significant change in appeal.

Most Appealing Canadian Destination – Top 10 Mentions



Other PEI	1.4%
Other NFLD	1.0%
Other ON	0.8%
Other North	0.7%
Other SK	0.6%
Other BC	0.5%
Other NB	0.3%
Other QC	0.3%
Other NS	0.2%

Whistler	1.6%
Edmonton	1.5%
Victoria	1.5%
Mont Tremblant	1.4%
Cape Breton	0.9%
Jasper	0.7%
Saint John	0.7%
Saskatoon	0.7%
Churchill	0.6%
Regina	0.6%
Okanagan	0.4%
St. John's	0.4%
Iqaluit	0.3%
Fredericton	0.2%
Inuvik	0.2%
Winnipeg	0.1%
Yellowknife	0.1%

/ Significantly higher/lower than 2017 GTW wave.

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=543)

QMP8. And, which place in Canada most appeals to you?

Vacation Activities

HIGHLIGHTS

- ✓ *Older UK travellers aged 55+ are more interested than younger travellers in participating in the following activities: trying local food and drink, seeing natural attractions like mountains and waterfalls, viewing wildlife, visiting historical sites, exploring Indigenous culture, guided city tours, seeing fall colours, cruises, and guided train tours.*
- ✓ *Travellers aged 25-34 are more likely than their older counterparts to be interested in shopping for luxury items and participating in a range of outdoor based activities including: camping, ziplining, scuba diving, skiing/snowboarding, cross country skiing/ snowshoeing, mountain biking, and golfing.*
- ✓ *Natural attractions, Northern lights, historical sites, wildlife viewing, and nature parks are the top trip anchor activities for UK travellers.*

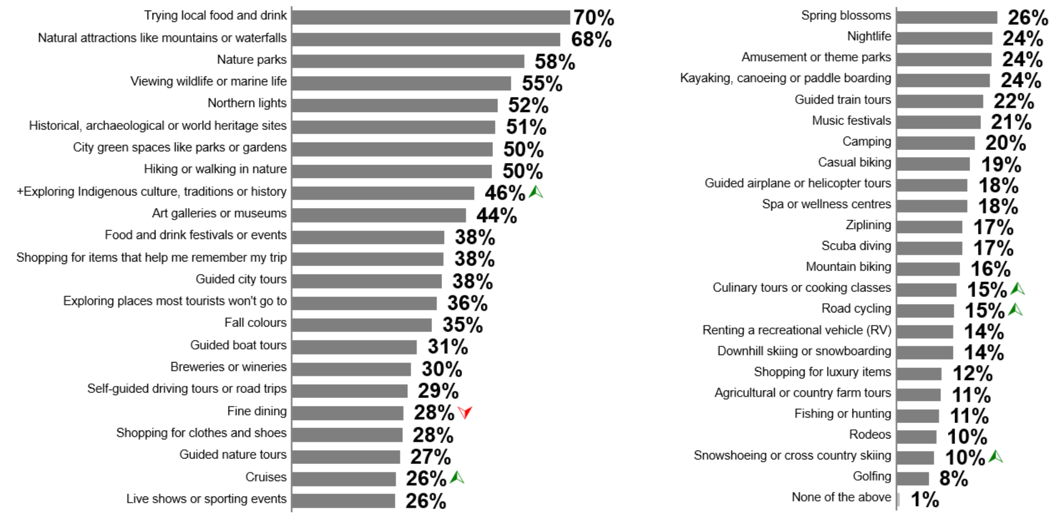
UK travellers were asked about which activities and experiences they seek while on holidays in general, regardless of the destination. The chance to sample local food and drink remains the most sought-after holiday experience. This is followed by several nature-based activities, including: seeing natural attractions like mountains and waterfalls, visiting nature parks, viewing wildlife, viewing Northern lights, visiting city green spaces, and hiking or walking in nature. Rounding out the top ten are more intellectual offerings including: visiting historical sites, exploring Indigenous culture/traditions, and visiting art galleries/museums. The results are similar to 2017 with the exception of exploring Indigenous culture, which moved into the top ten and is now ranked 9th (previously this activity was called Aboriginal culture and it is not possible to know whether increased interest reflects greater interest in Indigenous culture or is due to the wording change).

Outside of the top ten activities, there were several significant shifts from 2017 to 2018. Several activities had significant upward shifts, including cruises (26%, up from 23%), culinary tours/cooking classes (15%, up from 12%), road cycling (15%, up from 12%), and snowshoeing/cross country skiing (10%, up from 7%). Fine dining is the only activity to have a significant downward shift (28%, down from 33%).

Older UK travellers aged 55+ are more interested than younger travellers in participating in the following activities: trying local food and drink, seeing natural attractions like mountains and waterfalls, viewing wildlife, visiting historical sites, exploring Indigenous culture, guided city tours, seeing fall colours, cruises, and guided train tours. The top ten activities among UK travellers aged 55+ are all the same compared to general UK travellers except that guided city tours takes the place of hiking/walking in nature .

Travellers aged 25-34 are more likely than their older counterparts to be interested in shopping for luxury items and participating in a range of outdoor based activities including: camping, ziplining, scuba diving, mountain biking, skiing/snowboarding, cross country skiing/snowshoeing, and golfing. The top ten activities among UK travellers aged 25-34 are all similar to that of the general UK traveller except that attending food/drink festivals takes the place of visiting art galleries/museums.

General Activities/Places Interested In – All Activities



+ Aboriginal was changed to Indigenous in 2018 – review trending with caution.
Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=1503)
QMP10. In general, what activities or places are you interested in while on holiday?

▲ / ▼ Significantly higher/lower than 2017 GTW wave.

Trip Anchor Activities

A question added in 2017 asked UK travellers which vacation activities are important enough that they would base an entire trip around them.

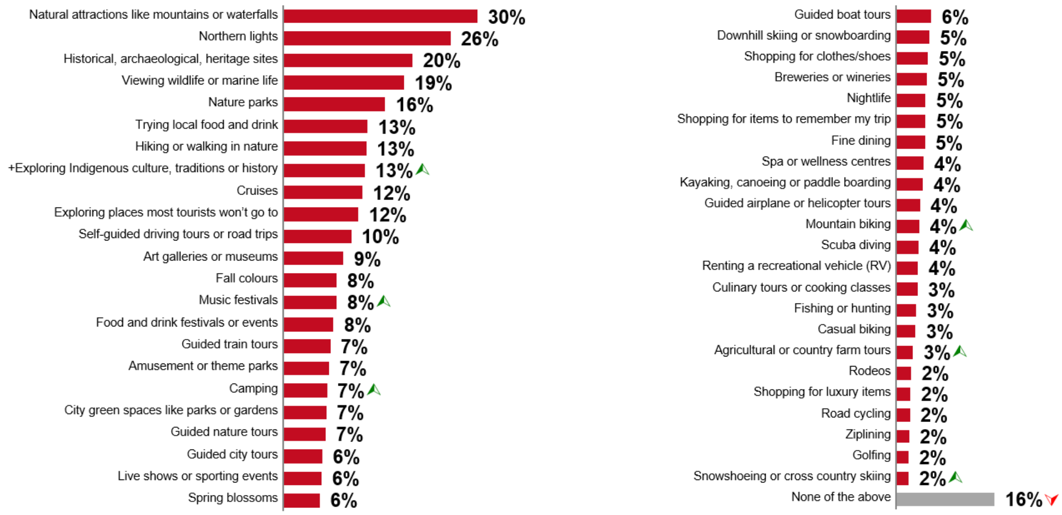
Consistent with 2017, natural attractions (30%), Northern lights (26%), historical sites (20%), and wildlife viewing (19%) are the top trip anchor activities. All of these are also among the top activities of interest for UK travellers. Given that UK travellers are willing to anchor a trip around these activities, messaging about their availability in Canada is recommended. These anchors are particularly important to highlight at the creating a vacation movie stage of the Path-to-Purchase since travellers are looking to create a framework around what their trip could look like.

While not top trip anchor activities, exploring Indigenous culture (13%, up from 8% in 2017), music festivals (8%, up from 5%), camping (7%, up from 4%), mountain biking (4%, up from. 2%), and agricultural/farm tours (3%, up from 1%) are up significantly in 2018. Once again, the increased interest in Indigenous culture may be a reflection of the wording change from Aboriginal.

UK travellers aged 55+ are more likely than younger travellers to cite cruises and guided train tours as trip anchor activities. The top ten trip anchor activities among UK travellers aged 55+ are all similar to that of the general UK traveller except that guided train tours (13%) and self-guided driving tours/road trips (13%) are slightly more popular than hiking/walking in nature (11%) and exploring places most tourists won't go (11%).

Those aged 25-34 indicate higher likelihood compared to older travellers to anchor a trip around camping and, although niche, agricultural/farm tours and golfing. The top ten trip anchor activities among UK travellers aged 25-34 are all similar to that of the general UK traveller except that camping (14%) and self-guided driving tours/road trips (11%) are slightly more popular than exploring Indigenous culture (10%), and much more popular than cruises (6%).

Trip Anchor Activities



+ Aboriginal was changed to Indigenous in 2018 – review trending with caution.
Base: Long-haul pleasure travellers (past 3 years or next 2 years) answering (n=1492)
MP12. Among these activities, are there any that are important enough that you would base an entire trip around that activity?

▲ / ▼ Significantly higher/lower than 2017 GTW wave.

Barriers

HIGHLIGHTS

- ✓ *Cost remains the primary deterrent to visiting Canada, cited twice as often as the next closest impediments – the desire to visit other places and the length of the flight. The cost of flights to Canada is the greatest concern among those citing cost as a barrier.*
- ✓ *The primary barriers of poor value for money and lack of vacation time increased significantly in 2018. These barriers are more acute among travellers aged 25-34.*
- ✓ *Older travellers aged 55+ have fewer barriers to visiting and are most likely to say nothing will prevent them from travelling to Canada.*

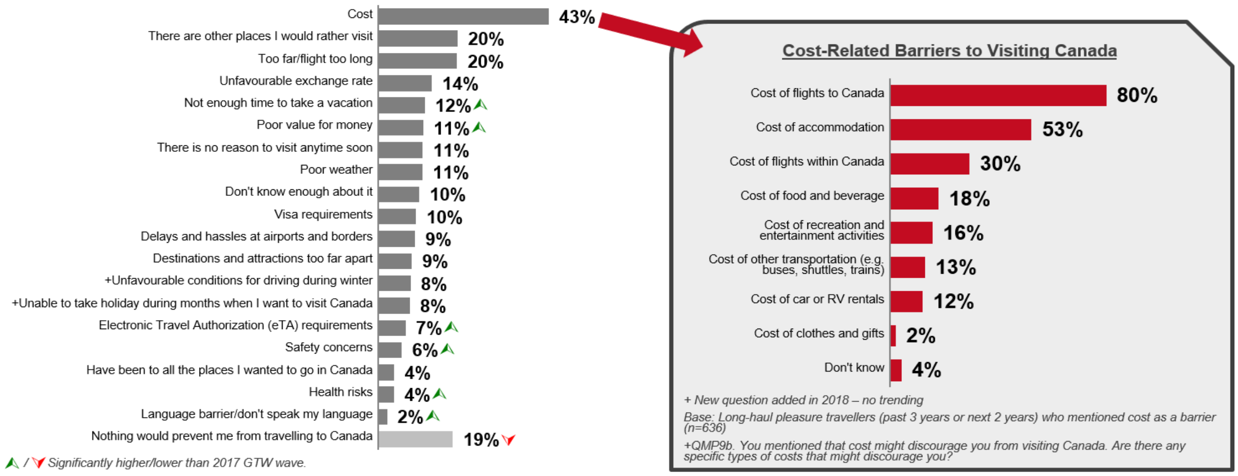
All UK long-haul travellers were asked what could prevent them from visiting Canada. Cost remains the primary deterrent, cited twice as often as the next closest impediments – the desire to visit other places and the length of the flight. Travellers aged 25-34 are more likely than those aged 55+ to mention cost, poor value for money, lack of knowledge, and say they don't have enough time to take a vacation. Older travellers aged 55+ are most likely to say nothing will prevent them from visiting Canada.

There are some significant increases to note in 2018. Lack of vacation time is up significantly from 2017 (12%, up from 8% but is in line with 2016). Poor value for money was mentioned by 11% in 2018, up from 9% in 2017. Concerns about Electronic Travel Authorization requirements are up in 2018 (7%, up from to 4% in 2017). While not major impediments, concerns about safety (6%, up from 4% in 2017), health risks (4%, up from 2%), and language barriers (2%, up from to 1%) are all up year-over-year. Travellers aged 25-34 are more likely than those aged 55+ to mention all of these barriers with significant increases in 2018.

A new question added in 2018 asked those concerned about cost to elaborate on specific types of costs. The cost of flights to Canada (80%) is greatest cost-related concern, followed by accommodation costs (53%), and cost of flights within Canada (30%).

While cost remains the top barrier among those who visited Canada in the past (30%), they are much less likely to cite it as a barrier compared to those who have never been (40%). Past visitors are more likely to mention delays and hassles at borders as a barrier (15%) versus those who have not visited Canada (9%). Past visitors are also more likely to mention they are unable to take a vacation during the months they wish to visit Canada (13% vs. 7%), safety concerns (10% vs. 5%), indicate they have been to all the places they want to visit (9% vs. 4%), and a possible language barrier (7% vs. 2%). They are also more inclined to say nothing will prevent them from visiting (26% compared to 18%).

Key Barriers for Visiting Canada



+ New statement added in 2018 – no trending
Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=1503)
QMP9. Which of the following factors might discourage you from visiting Canada?

Recent Trip Profile

HIGHLIGHTS

- ✓ *Younger travellers aged 25-34 are more likely to use travel agents/tour operators for research only compared to those aged 55+. Conversely, travellers aged 55+ are more likely to use travel agents/tour operators for booking only compared to those aged 25-34.*
- ✓ *Recent visitors to Canada are opting for more budget friendly types of accommodation, as there were significant increases in use of Airbnb/rental apartments, motels, and hostels/university dorms. This could be related to compression issues in major centres and/or be value-related.*
- ✓ *While the proportion of UK travellers visiting the US is steady, there is a significant decline in overnight stays and a corresponding rise in day visits.*

The following section provides details on the most recent long-haul trip taken by UK travellers to competitive set destinations in the past 3 years (71% took such a trip). If the most recent trip encompassed more than one destination, the data reflects where the most time was spent.

Trip Purpose

The primary reason for travelling among all UK long-haul travellers to any destination continues to be for holiday purposes; however, this reason is mentioned significantly less in 2018 (58%, down from 65% in 2017 and 2016). Compared to general UK travellers, those aged 55+ are more likely to say that their most recent trip was to visit friends and family (34% vs. 25%).

Consistent with 2017, going on a holiday (49%) and visiting friends and relatives (29%) are the primary purposes for taking a trip specifically to Canada. This result continues to underscore the importance of VFR (Visiting Friends and Relatives) as a reason for UK travellers to visit Canada. Mentions for combining business and personal reasons as the primary purpose for travelling to Canada are also significantly up (12%, up from 6% in 2017).

Motivators

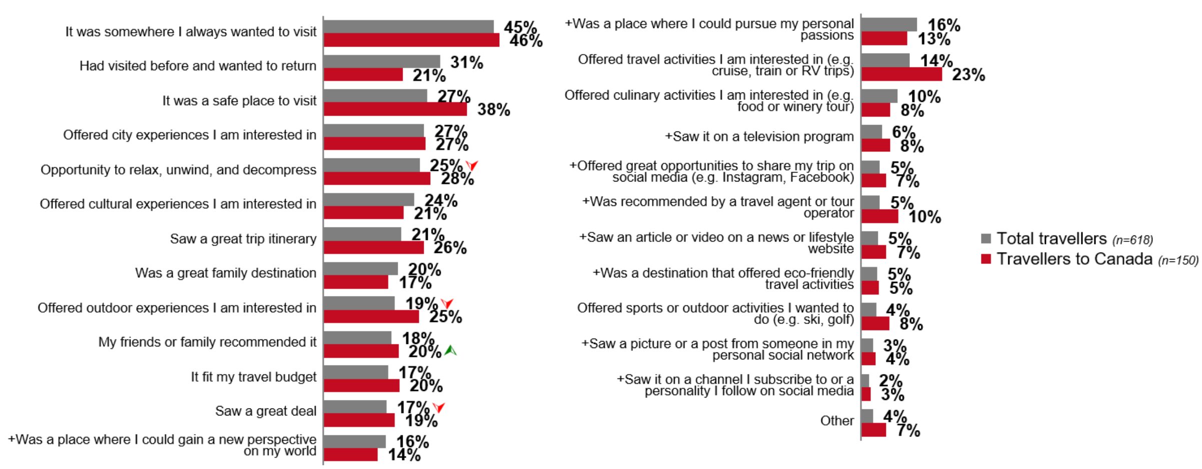
Those travelling for holiday purposes were asked about factors which influenced their choice of destination.

The longstanding desire to visit remains the primary reason for selecting the holiday destination, both among travellers generally (45%) and visitors to Canada (46%). Past visitation to the destination ranks as the second most influential factor for the destination being chosen among UK travellers (31%); however, this is a relatively less important reason for choosing to visit Canada (21%). Instead, safety continues to be the second most important motivator for UK travellers visiting Canada (38%).

Among all UK travellers, the opportunity to relax and to unwind was mentioned significantly less as a motivator in 2018 (25%, down from 36% in 2017), as are mentions for outdoor experiences (19%, down from 26% in 2017), and seeing a great deal (17%, down from 26% previously). Visitors to Canada were more influenced by word-of-mouth in 2018, as recommendations from family and friends was mentioned significantly more often as a motivator to travel to Canada (20%, up from 11% in 2017).

Older travellers aged 55+ are more likely to have been motivated to choose their recent trip destination because they saw a great trip itinerary (31%) and because the destination offered travel activities they are interested in (21%). Those aged 25-34 were more likely to mention that they were motivated by opportunities to share their trip on social media (13%).

Factors Influencing Destination Selection



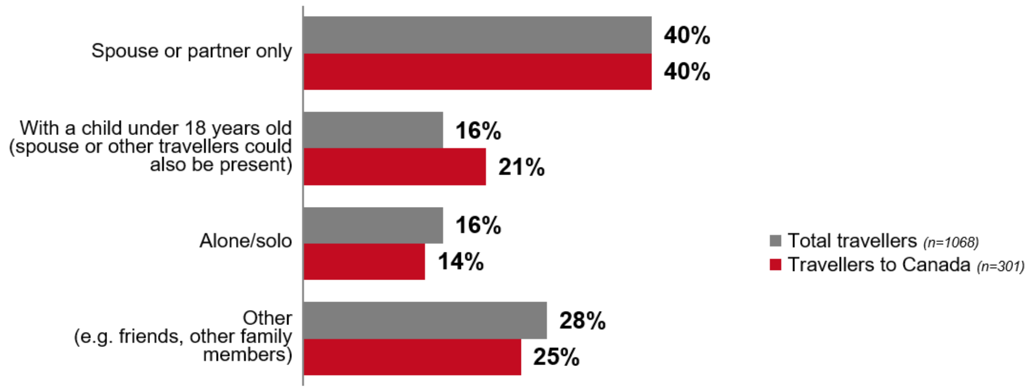
/ Significantly higher/lower than 2017 GTW wave.
+ New statement added in 2018 – no trending
Base: Long-haul pleasure travellers (past 3 years) travelling for holiday
QRT3. Which of the following factored into your choice of destination for this trip?

Travel Party

UK travellers to any long-haul destination travelled solely with their spouse or partner (on a couple's trip) for 40% of total trips. Those travelling with children under the age of 18 accounted for 16% of total trips, while solo travel made up an additional 16% of trips. The remaining 28% of trips were a combination of other travel parties, such as travelling with other family members, friends, or business colleagues.

Among those who travelled to Canada, 40% travelled solely with their spouse or partner. There is a significant increase in the proportion travelling with children under 18 (21%, up from 10% in 2017 and 17% in 2016). The UK represents one of the larger family travel markets for Canada (tied with Germany and behind only India, the US and Mexico). Solo travel to Canada has significantly decreased in 2018 among UK travellers (14%, down from 21% in 2017, but is consistent with 13% in 2016). The remainder of trips (25%) consisted of other travel parties.

Travel Party



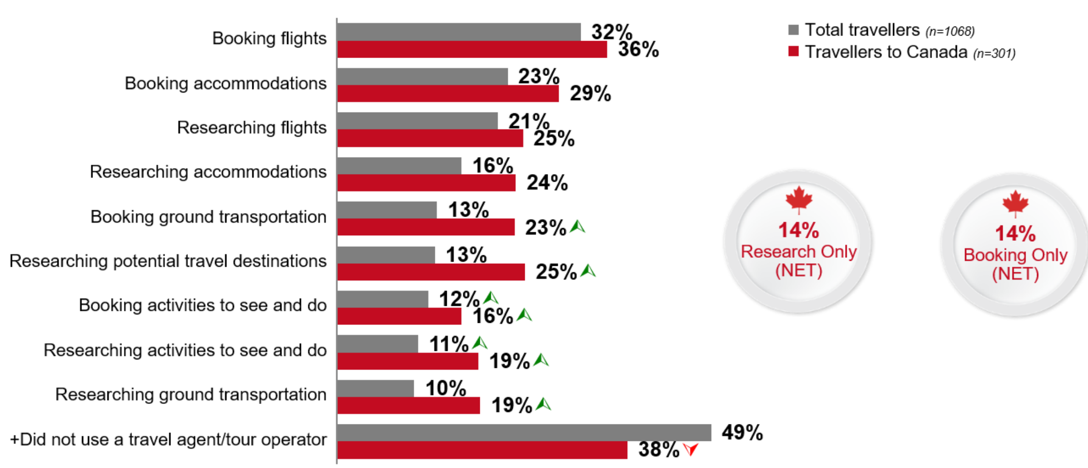
Base: Long-haul pleasure travellers (past 3 years)
QRT4. With whom did you travel on this trip?

Booking

Fifty-one percent of all UK travellers report consulting a travel agent/tour operator on their most recent long-haul trip for either planning or booking purposes. Travel agent/tour operator use is higher among visitors to Canada and is up significantly in 2018 (62%, up from 42% in 2017). Travel agents/tour operators are most likely to be used for bookings rather than earlier in the planning cycle.

Younger travellers aged 25-34 are more likely to use travel agents/tour operators for research only (23%) compared to those aged 55+ (3%). Conversely, travellers aged 55+ are more likely to use travel agents/tour operators for booking only (25%) compared to those aged 25-34 (13%).

Travel Agent/Tour Operator Usage



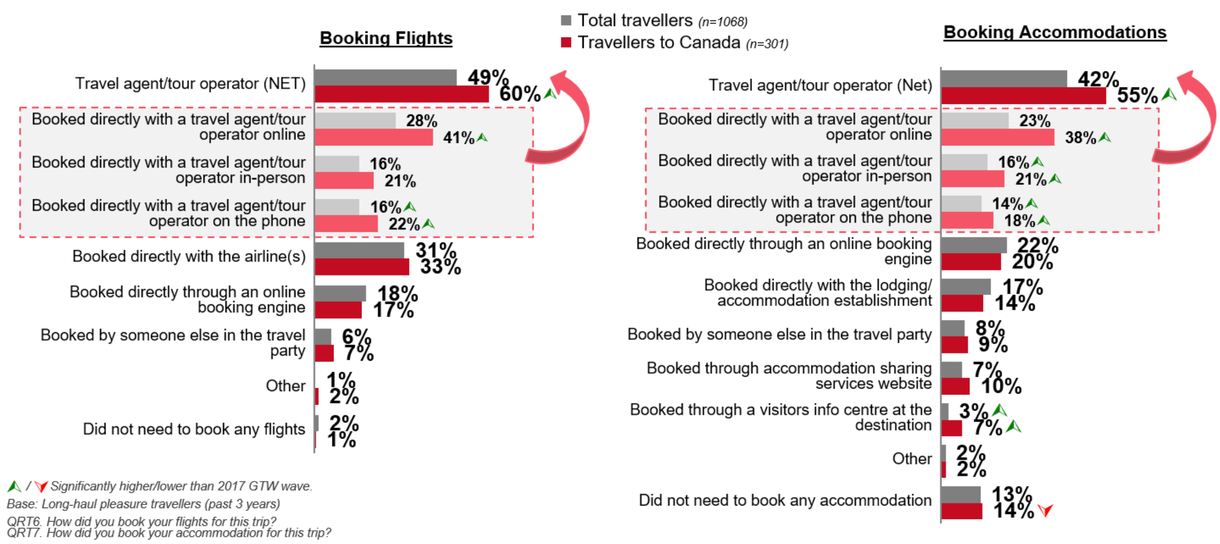
Significantly higher/lower than 2017 GTW wave.
+ 'Tour operator' was added to the question in 2018 – review trending with caution.
Base: Long-haul pleasure travellers (past 3 years)
QRT15. Did you use a travel agent or tour operator to help you with any of the following for this trip?

In terms of flights, the most popular way to book is a trip to any destination is through a travel agent/tour operator (49%), with booking directly with a travel agent/tour operator online being the most prevalent (28%). This is followed by booking directly with the airline (31%), and online booking engines (18%).

The pattern for trips to Canada is slightly different, with travel agent/tour operator use on the rise (60%, up from 45% in 2017). This increase in travel agent usage for trips to Canada is attributable to increases in booking directly with a travel agent online (41%, up from 22%) and booking directly with a travel agent on the phone (22%, up from 12% previously).

For accommodation, booking with a travel agent/tour operator is most popular (42%), with booking directly with a travel agent/tour operator online being the most common method (23%). This is followed by booking via an online booking engine (22%), and directly with the provider (17%). Among those who visited Canada, travel agent/tour operator use also rose significantly in 2018 (55%, up from 37% in 2017), with increases across all types of direct travel agent tour operator channels.

Booking of Flights and Accommodations



Thirty-three percent of UK travellers indicated that at least a portion of their trip was part of an organized group tour, up significantly from 28% in 2017. The proportion taking organized group tours among recent travellers to Canada is even higher, with 45% indicating that they participated in an organized group tour (up significantly from 34% in 2017). Younger travellers aged 25-34 (49%) are much more likely to than those aged 55+ (26%) to say that they took an organized group tour on their recent trip. Almost all group tours to Canada are booked with a travel agent (92%), with booking through a travel agent/tour operator online being most common (68%, up significantly from 49% in 2017).

Type of Accommodation

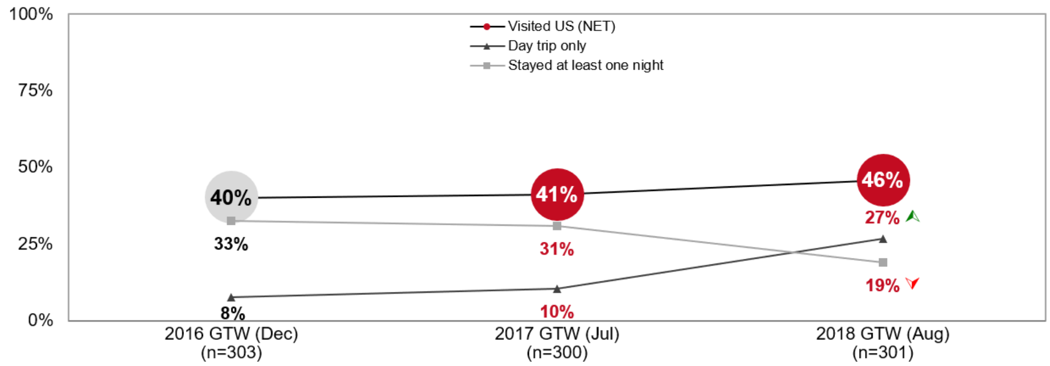
Overall, UK travellers continue to opt for mid-priced hotels (45%) and luxury hotels (27%) for accommodation. While representing only a small proportion of accommodation options when travelling, there are significant increases for camping (5%, up from 2% previously) and staying at a cottage/second home (5%, up from 1% in 2017). Compared to travellers aged 25-34, those aged 55+ are more likely to choose mid priced hotels (55% versus 36%). Travellers aged 25-34 are more likely than older travellers aged 55+ to prefer alternative accommodation types such as rented houses, B&Bs, hostels, camping and personal cottages or second homes.

Recent UK visitors to Canada also stay at mid-priced hotels most often (38%), however, this has decreased significantly compared to the previous year (down from 57% in 2017). This decline can be attributed to significant increases for many budget friendly lodging options including Airbnb/rental apartments (21%, up from 13% in 2017), motels (20%, up from 12% in 2017), and hostels/university dorms (13%, up from to 6% in 2017) – all of which are more popular among younger travellers.

US Visitation

Consistent with 2017, combining a trip to Canada with a visit to the US is common among UK travellers (46%). While the proportion of UK travellers visiting the US is steady, there is a significant decline in overnight stays and a corresponding rise in day visits. Significantly more UK travellers reported going on a day trip to the US in 2018 (27%, up from 10% in 2017), while overnight visits saw a significant decrease (19%, down from 31% in 2017).

Canada & US Visitation – Trended



/ Significantly higher/lower than 2017 GTW wave.

Base: Travellers to Canada
QRT13. Did you also visit the U.S. during this trip, either for a day or overnight stay?

Information Sources

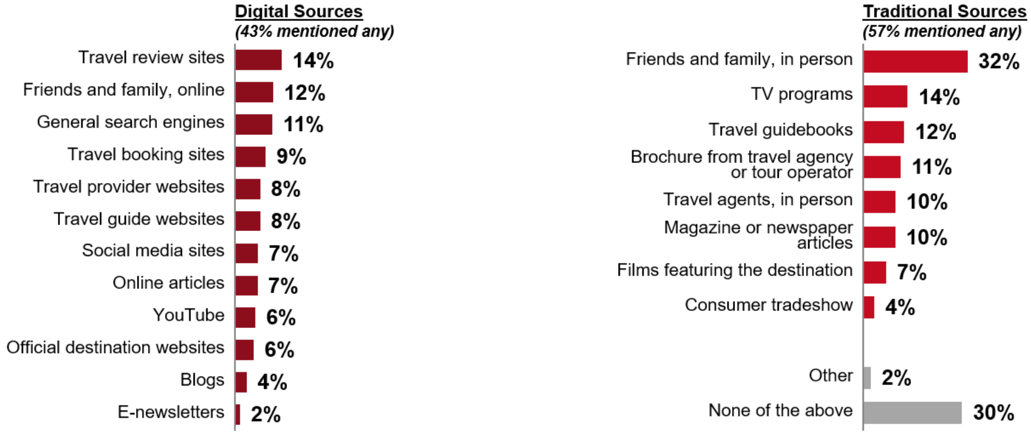
HIGHLIGHTS

- ✓ *Travellers aged 18-34 are more likely than older cohorts to cite friends and family in person as a source of influence, this indicates that they are more welcoming of advocates.*
- ✓ *Older travellers aged 55+ are most likely to indicate none of the listed sources were influential (41%), indicating that they are more likely to see themselves as the ultimate influence of where they travel.*

A new question added in 2018 asked UK travellers whether they had booked a trip in the past three years based on a recommendation from any sources. The top source by a wide margin is personal recommendations from friends and family (32%), followed by TV programs and travel review sites (each selected by 14%). Friends and family online and travel guidebooks (each chosen by 12%) were the next most influential. Younger travellers aged 18-34 are more likely than travellers aged 35+ to cite almost all traditional and digital sources. Of note, travellers aged 18-34 are more likely than older cohorts to cite friends and family in person as a source of influence, this indicates that they are more welcoming of advocates. Older travellers aged 55+ are more likely to indicate none of the listed sources were influential (41%), indicating that they are more likely to see themselves as the ultimate decision maker of where they travel.

Among recent visitors to Canada, several mediums including TV programs (26%), guidebooks (20%), travel agents in-person (19%), print articles (17%), films (13%), social media sites (13%), online articles (13%), and consumer shows (9%) were significantly more likely to be cited.

Influence of Sources in Destination Selection



+ New question added in 2018 – no trending,
Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=1503)
+MT5. In the past 3 years, have you booked a trip based on a recommendation from any of the following sources?