Market and Trade Profile: Canada

Canada – January 2020

Overview

- **Chapter 1: Inbound market statistics** provides insights on key statistics about Canadian travellers and who they are. It takes a look at Britain and its competitive set as well as activities of Canadian visitors in the UK.
- **Chapter 2: Experiences and perceptions** features details about what visitors from Canada are likely to do in the UK, how they felt during their visit to the UK, and whether they would recommend a stay there to their acquaintances. Perceptions of Britain held by Canadians in general are also highlighted.
- **Chapter 3: Understanding the market** takes a close look at Canadian consumer trends, booking, planning and further travel behaviour of this source market. Perceptions of Britain held by Canadians are also highlighted.
- **Chapter 4: Access and travel trade** shows how Canadians travel to the UK, how to best cater for their needs and wants during their stay and gives insights into the Canadian travel trade. Further ways of working with VisitBritain and other useful research resources are pointed out.

Contents (1)

Executive summary (page 6)

Chapter 1: Market statistics

1.1 Key statistics (page 11)

Tourism context, UK inbound overview, key figures on journey purpose, seasonality, duration of stay and accommodation trends, repeat visits, and visit types

1.2 Getting around Britain (page 18)

Where visitors stayed in the UK, places they visited, and internal modes of transport

1.3 Visitor demographics (page 23)

Demographic profile of Canadian visitors (age, gender)

1.4 The UK and its competitors (page 26)

How visits to the UK compare to main competitor destinations, and long-term trend and forecasts

Chapter 2: Experiences and perceptions

2.1 Inbound activities (page 31)

What activities Canadian visitors undertook in the UK

2.2 Welcome and recommending Britain (page 37)

How welcome departing visitors felt in Britain, and how likely they were to recommend a visit

2.3 Perceptions of Britain (page 38)

How people in this source market see Britain, and how it compares to other destinations

Contents (2)

Chapter 3: Understanding the Market

3.1 Structural drivers (page 46)
Key demographic, social, economic indicators and exchange rates influencing the outbound travel market

3.2 Consumer trends (page 50)
General and travel-related trends in this source market

3.3 Booking and planning (page 52)
How Canadian travellers plan and book their trips to the UK, and their holidays in general

3.4 Reaching the consumer (page 55)
An overview of the media landscape in this source market, and main sources of influences for people planning a holiday

Chapter 4: Access and Travel Trade

4.1 Access (page 62)
How visits to the UK were made, and an overview of the air connections between this source market and the UK

4.2 Travel trade (page 66)
What the travel trade in market looks like and useful tips to work with travel agents and other main players

4.3 Caring for the consumer (page 72)
Tips to understand Canadian travellers and best cater to their needs

Appendix:

Working with VisitBritain (page 75)
Useful resources (page 78)
Definitions, sources and information on this report (page 80)

Executive summary

1: Inbound market statistics

Chapter summary

Canada's outbound travel market is forecast to increase in the years to come. According to Oxford Economics, the market is forecast to hit 40.3 million trips abroad trips abroad with at least one overnight stay by 2020.

Ireland (43%), France (42%), and Germany (30%) are the holiday destinations that Canadian holidaymakers to Britain were most likely to consider as alternative destinations.

Canadians rank globally in 8th place for international tourism expenditure with over US$33bn spend in 2018.

Canada was the 12th largest inbound source market for the UK for volume and the 9th most valuable source market for visitor spending in the UK in 2018.

88% of departing Canadian holidaymakers would be 'extremely likely' to recommend Britain for a holiday or short break.

The UK was the 3rd most visited European destination by Canadians in 2018.

Source: International Passenger Survey by ONS, VisitBritain/IPSOS 2016, Oxford Economics, UNWTO,

2. Experiences and perceptions

Chapter summary

Top activities featuring in visits from Canada to the UK include dining in restaurants, shopping and going to a pub.

Culture and history are strong pulls to the UK. Canadians have a higher than average propensity to visit museums and art galleries, and over 4 in 10 visit historic houses and castles.

Canadians are positive about Great Britain: the nation is ranked 2nd among 50 nations for its overall image based on six dimensions (Tourism, Culture, People, Exports, Governance, Immigration & Investment).

Canadians have a strong feeling of welcome when they visit the UK. 97% of departing Canadian holidaymakers are either ‘very’ or ‘extremely’ likely to recommend a visit to the UK to friends and family.

Source: International Passenger Survey by ONS, Anholt Nation Brands Index, powered by Ipsos 2018

3.Understanding the market

Chapter summary

Canada's population reached 37.5 million in 2019.

Almost 6 in 10 overnight outbound trips from Canada were made for leisure purposes in 2018 and with over 20% of the population being foreign-born, demand for travel to visit friends and family is also high.

Canada's outbound travel market is forecasted to grow by 12% in the next five years.

Almost 6 in 10 Canadian holiday visitors tend to start thinking about their trip to Britain early, more than half a year in advance.

37% of Canadian travellers booked their trip to Britain three to six months before arrival. Almost one fifth of travellers booked last-minute (within one month before arrival).

More than half of Canadian travellers to Britain book travel and accommodation together, with 71% doing so online.

Mobile is a growing segment making up one third of media time in Canada with almost half saying they have purchased a product or service online using their mobile device in 2018.

Canada's outbound travel market is forecasted to grow by 12% in 2018-2023.

Source: Oxford Economcis, VisitBritain/IPSOS 2016, Insights West

4. Access and travel trade

Chapter summary

Annual seat capacity from Canada to the UK has grown 14% in the past 5 years and reached 2.1 million seats in 2019.

9 airports in Canada were connected to the UK via direct non-stopping flights in 2019 with an average weekly capacity around 40,000 seats. Airline capacity is very important as 93% of Canadian visits to the UK were made by plane in 2018.

London Heathrow and London Gatwick welcomed 90% of Canada's direct flights to the UK in 2019. Manchester's capacity has increased 24% over the past 3 years and surpassed 100,000 seats in 2019.

The trade structure in Canada is closer to that in Britain than in the USA.

Travel e-commerce has grown rapidly. It is increasingly evident that both airlines and travel agents are placing more emphasis on 'direct sell' as well as vertically integrated players moving into the OTA space.

Seat capacity

from Canada to the UK has increased by 14% from 2014-2019

Source: Apex 2019, non-stop flights only, VisitBritain/IPSOS 2016, base: visitors

Chapter 1:

Inbound market statistics

Chapter 1.1: Key statistics

Key insights

850,000 Canadians visited the UK in 2018 (up 2% on 2017) which makes Canada the UK's 12th largest source market.

VFR and holiday visits continue to lead in terms of volume of visits from the Canadian market, representing 81% of all visits. Holiday visits reached 339,000 in 2018, setting a new record.

In 2018, Canadians visiting the UK spent a record setting £676 million - up 12% on 2017 and including a record for VFR spend. Spend per visit also increased to £795, a new record.

Canadian visitors spent an average of 9 nights per visit in the UK in 2018, longer than the global average of 7 nights.

Canadians are more likely to stay outside of London than the average visitor; 66% of Canadian nights were spent outside London in 2018 compared to 58% of the global total.

Around half of all nights spent in the UK by Canadian visitors are spent for free in the house of relatives or friends, followed by 31% which are spent in a hotel or guest house.

Holidays from Canada to the UK increased to a record 339,000 in 2018.

Source: International Passenger Survey by ONS

1.1 Key statistics: global context and 10 year trend

Global context

Measure	2018
International tourism expenditure (US$bn)	33.5
Global rank for international tourism expenditure	8
Number of outbound overnight visits (m)	39.2
Most visited destination	USA
Most visited European destination	France

Inbound travel to the UK overview

Measure	Visits (000s)	Nights (000s)	Spend (£m)
10 year trend	-1%	-4%	+29%
2008	857	8,115	522
2009	687	6,802	408
2010	686	7,413	513
2011	740	7,061	512
2012	704	7,036	559
2013	731	7,207	524
2014	649	6,132	473
2015	708	6,838	506
2016	828	8,219	634
2017	835	8,248	604
2018	850	7,759	676
Share of UK total in 2018	2.2%	2.9%	3.0%

Source: International Passenger Survey by ONS, UNWTO, Oxford Economics

1.1 Key statistics – volume and value

Inbound volume and value

Measure	2018	Change vs. 2017	Rank out of UK top markets
Visits (000s)	850	2%	12
Nights (000s)	7,759	-6%	12
Spend (£m)	676	12%	9

The UK welcomed 406,000 visits from Canada in Jan-Jun 2019 (up 11% on Jan-Jun 2018).*

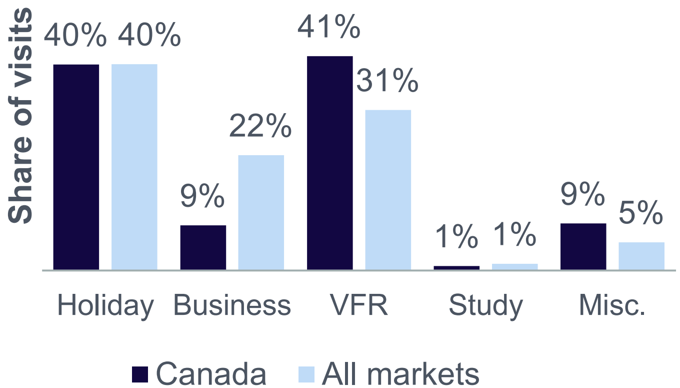
Nights per visit, spend

Averages by journey purpose in 2018	Nights per visit	Spend per night	Spend per visit
Holiday	8	£113	£863
Business	5	£214	£1,011
Visiting friends/ Relatives	12	£56	£688
All visits	9	£87	£795

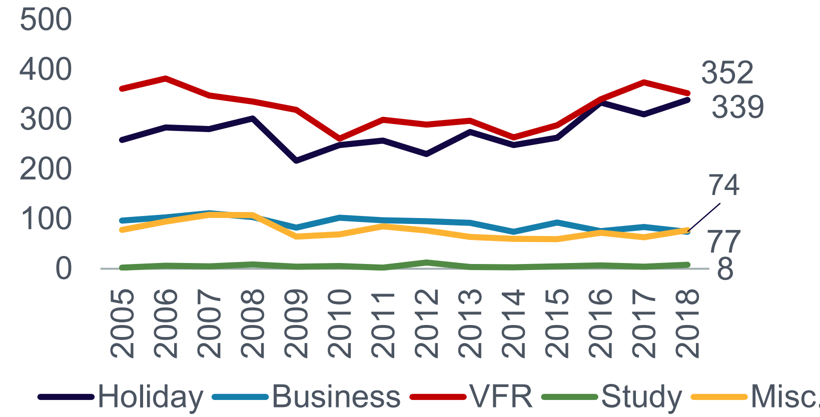
*Source: International Passenger Survey by ONS, *2019 IPS data is provisional*

1.1 Key statistics: journey purpose

Journey purpose 2018



Journey purpose trend (visits 000s)



41% of all visits to the UK from Canada were visits to friends and/or relatives, and 40% were made for holiday purposes, in 2018.

60% of holiday visits from Canada to the UK (excl. UK nationals) in 2015 were made by repeat visitors.

On average a Canadian holidaymaker came 2.8 times to the UK in the past 10 years.*

VFR and holiday visits continue to lead in terms of volume of visits from the Canadian market.

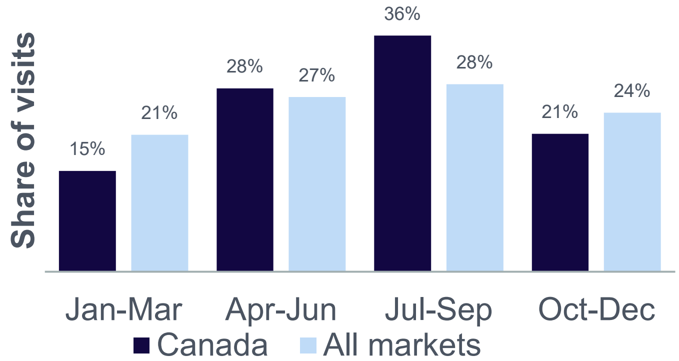
In 2018 the number of holiday visits from Canada to the UK was up 9% compared to the previous year, to a record 339,000 holidays.

The number of visits to friends and relatives in 2018 was 29,000 visits short of the peak last seen in 2006, prior to the global financial crisis.

*Source: International Passenger Survey by ONS, *IPS 2015*

1.1 Key statistics: seasonality

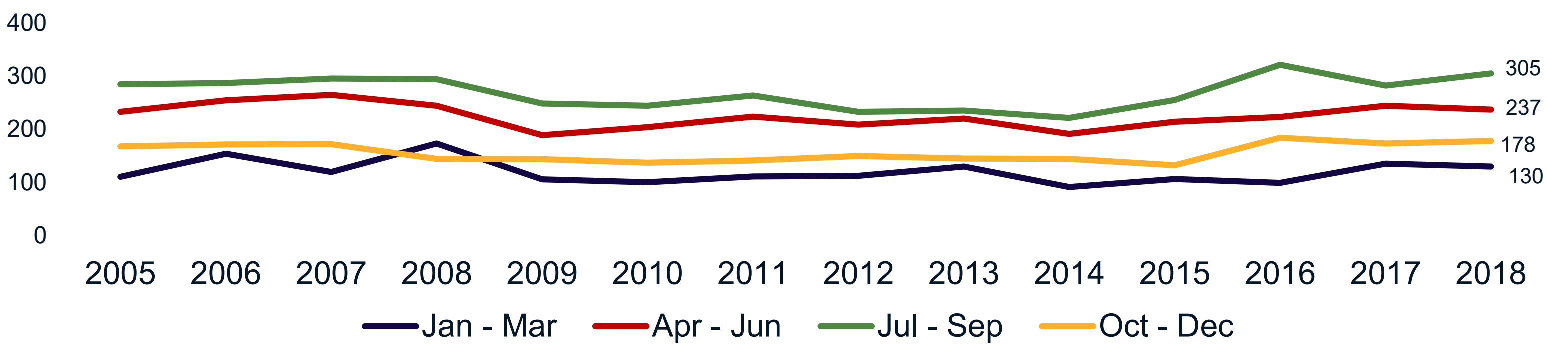
Seasonality 2018



The summer quarter remains the most important period for Canadians to visit the UK. In 2018, 36% of visits from Canada to the UK were made in the third quarter, followed by 28% in the second quarter. Canadians visit the UK less often in the low seasons compared to the average UK visitor.

The volume in the second half of 2018 showed 6% growth compared to 2017 whereas the volume in the first half year was down 3% on the previous year.

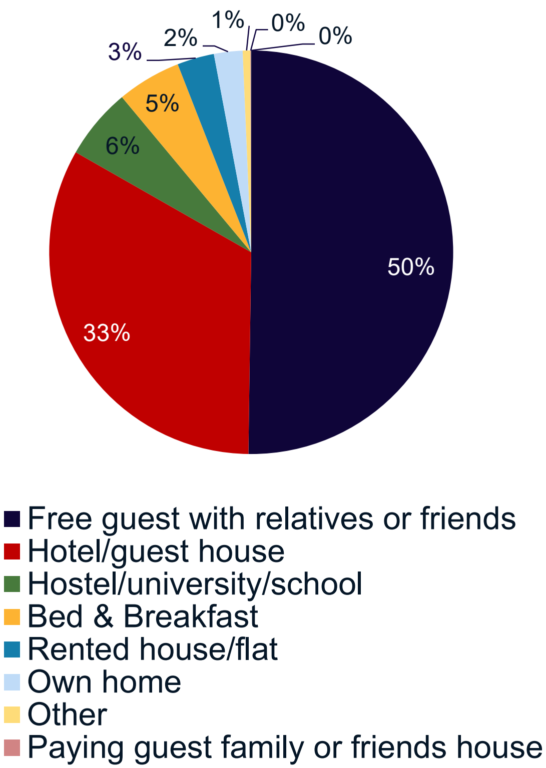
Seasonality trend (visits 000s)



Source: International Passenger Survey by ONS

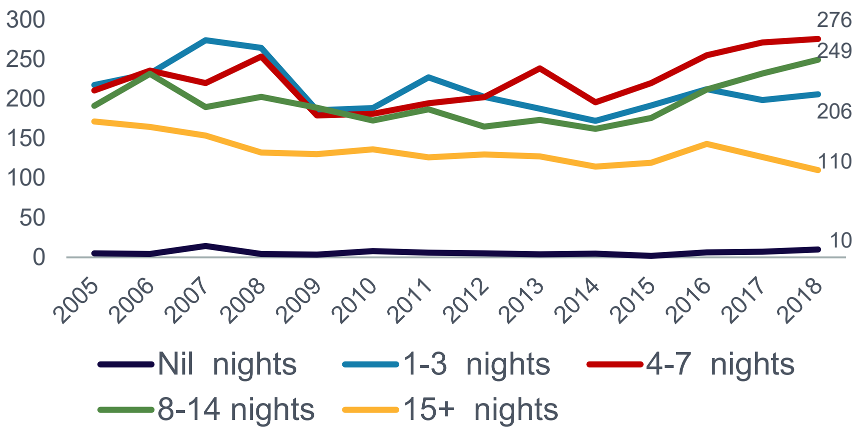
1.1 Key statistics: length of stay and accommodation

Accommodation stayed in, 2018 (nights, % share)



Source: International Passenger Survey by ONS

Duration of stay trend (visits 000s)



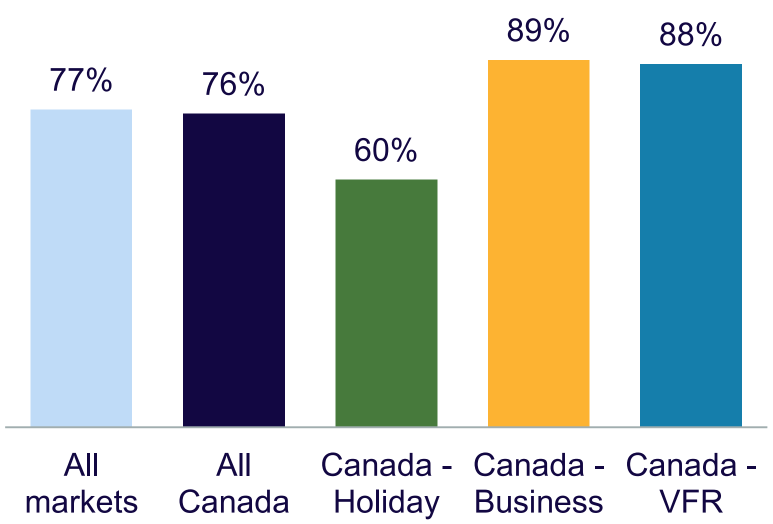
Canadian visitors spent on average 9 nights per visit in the UK in 2018, longer than the global average of 7 nights. This is partly due to the large VFR component in Canadian visits to the UK, as these visits tend to be longer than average.

The most common length of stay for Canadian travellers in the UK was 4-7 nights, followed by long trips of 8-14 nights and then short trips of 1-3 nights.

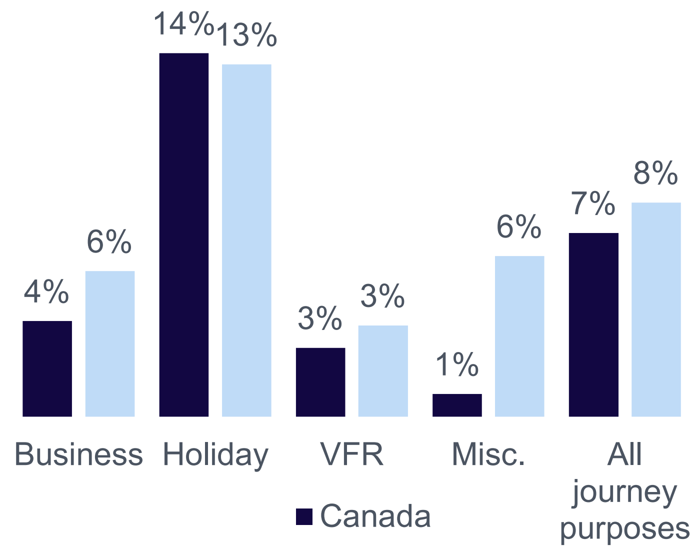
Around half of nights were spent for free in the house of relatives or friends, followed by 33% which were spent in a hotel or a guest house, in 2018.

1.1 Key statistics: repeat visits and package tours

Proportion of overnight visitors to the UK who have been to the UK before*



Proportion of visits that are bought as part of a package or all-inclusive tour in 2018**



76% of holiday visits from Canada to the UK were made by repeat visitors (excl. UK nationals). These repeat visitors came on average between two and three times in the past ten years (2.8 times, a slightly above average visit frequency compared to other markets) and spent £2,290 in the UK in total in the past ten years.
The highest proportion of repeat visitors were among those coming for business purposes (89%) or to visit friends or relatives who live in the UK (88%).

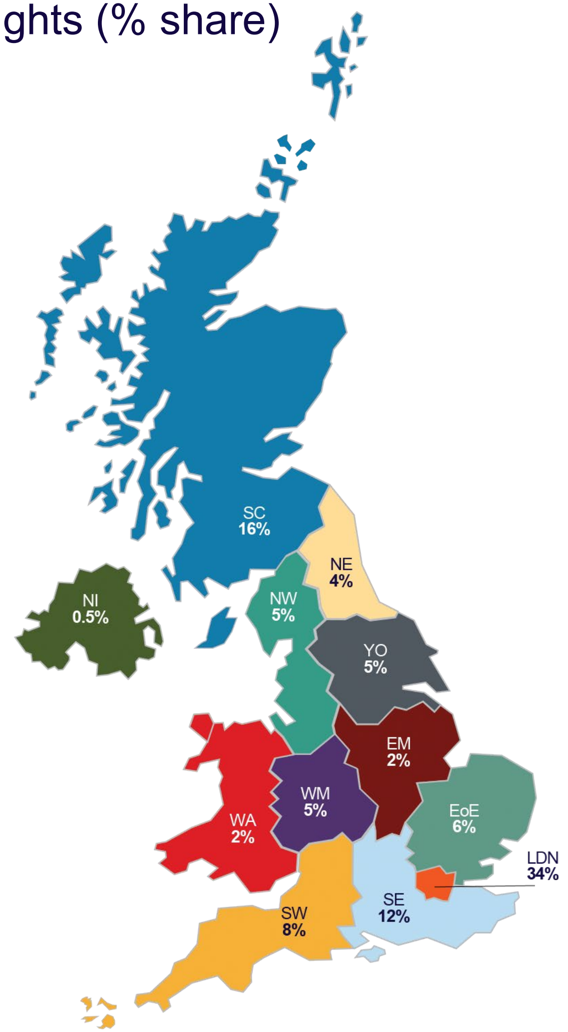
*International Passenger Survey by ONS. *repeat / first time visitors question asked in 2015 excluding British nationals; **See definition of a package holiday in appendix*

1.2 Getting around Britain

Nights and visits to the UK in 2018

Region*	Nights stayed (000)	Visits (000)
Total	7,759	850
Scotland (SC)	1,269	131
Wales (WA)	178	36
Northern Ireland (NI)	20	4
London (LDN)	2,613	474
North East (NE)	287	7
North West (NW)	388	55
Yorkshire (YO)	383	37
West Midlands (WM)	368	38
East Midlands (EM)	172	27
East of England (EoE)	483	62
South West (SW)	640	77
South East (SE)	930	162
Nil nights (Nil)	n/a	10

Nights (% share)



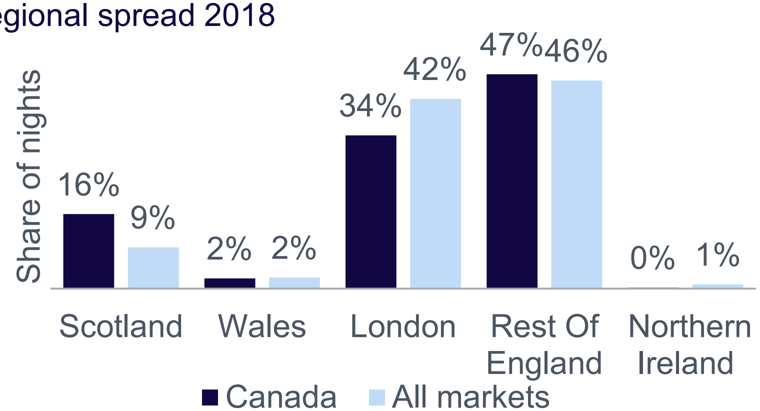
*Source: International Passenger Survey by ONS * The region is based on the location in which the visitor stayed overnight*

1.2 Getting around Britain: regional spread and top towns and cities

Top towns and cities visited 2016-2018

Town	Overnight visits (000s)
London	459
Edinburgh	80
Glasgow	52
Manchester	25
Inverness	17

Regional spread 2018



Source: International Passenger Survey by ONS

When visiting the UK, 81% of nights by Canadians are spent in England; London accounts for 34% of visitor nights and the rest of England for 47% of visitor nights. The South East is the most popular region to visit outside of London, attracting 162,000 Canadian visits in 2018.

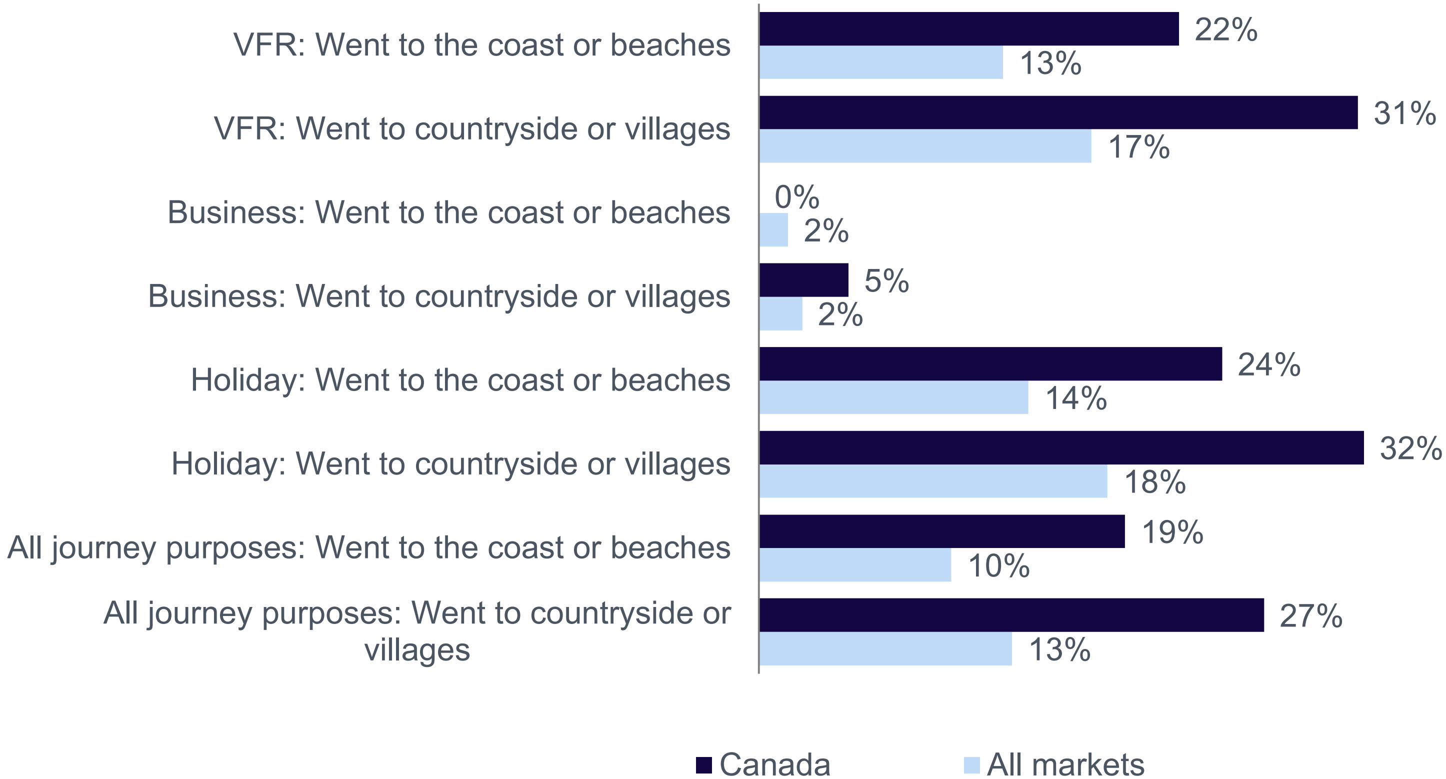
Scotland is a relatively popular UK region among Canadian travellers. 16% of nights were spent in Scotland, compared to a global average of 9% of all international nights spent.

Visitors from Canada have an above average propensity to visit rural and coastal areas of Britain on their trip.

Canadian visitors tend to be comfortable with taking public transport, showing above-average use of these modes of transport. When in a town/city, 54% of Canadian visitors use a bus, tube, tram or metro on their visit and 36% a train.

1.2 Getting around Britain: visits to coast, countryside and villages

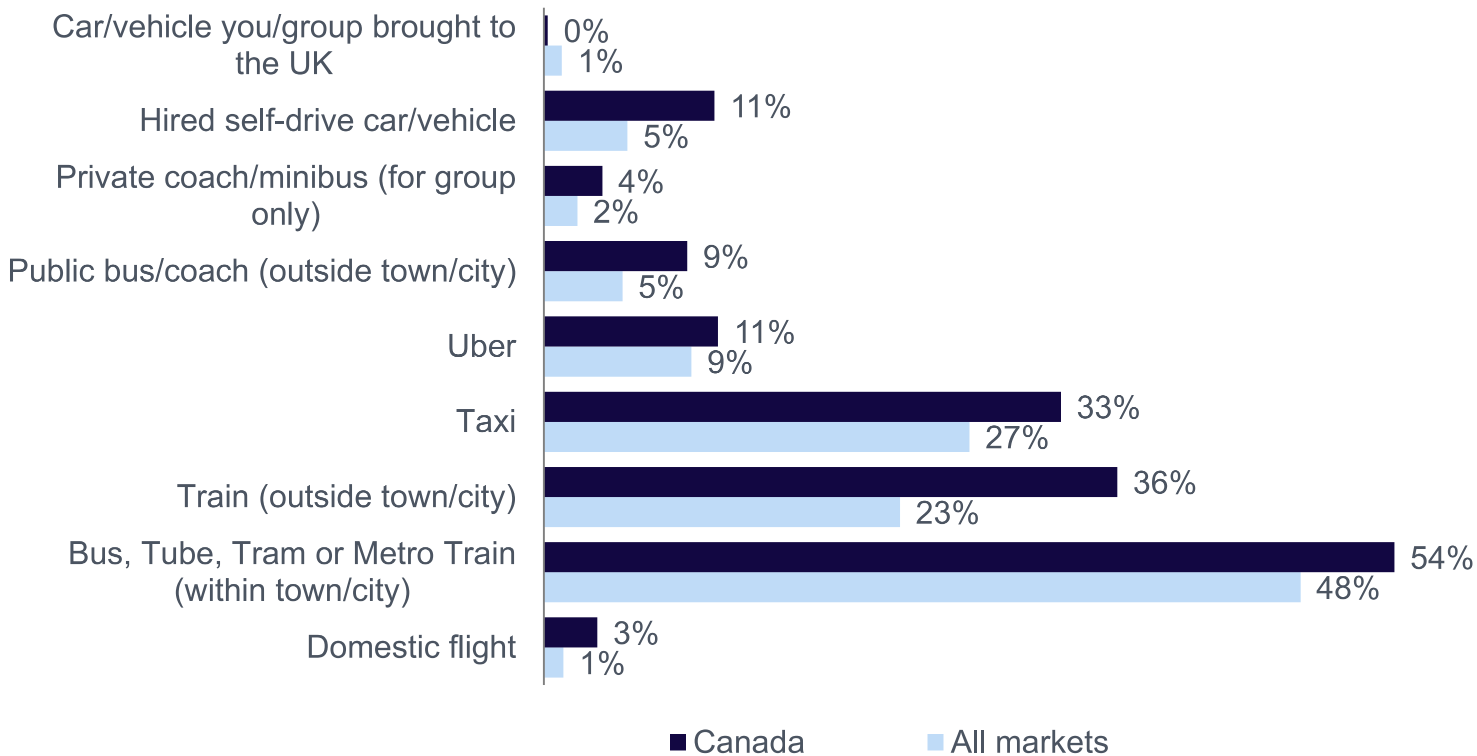
Propensity to visit coast, countryside and villages



Source: International Passenger Survey by ONS 2016

1.2 Getting around Britain: use of internal modes of transport

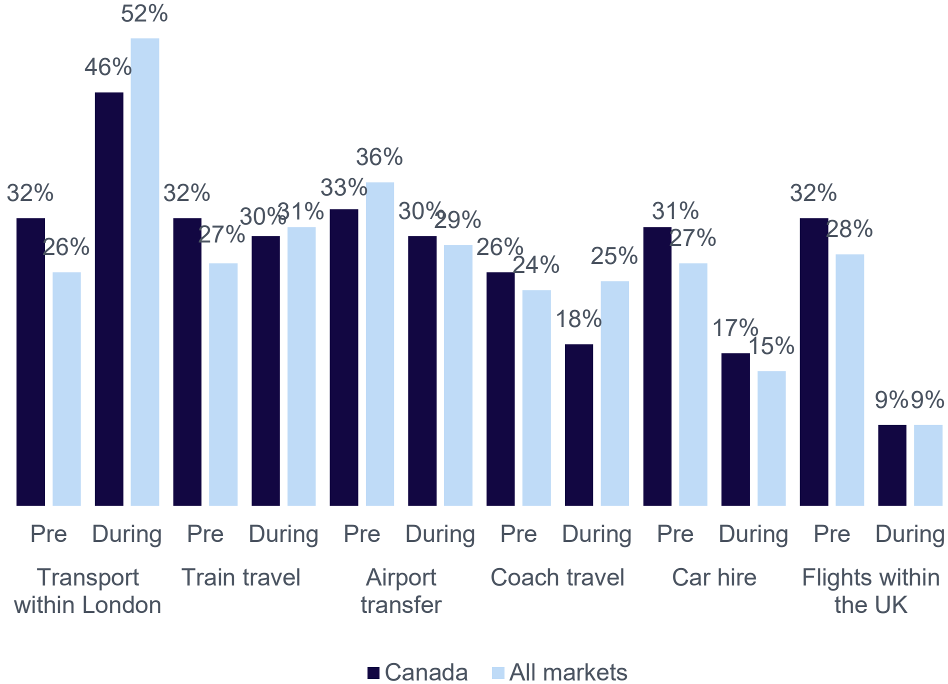
Propensity to use internal modes of transport



Source: International Passenger Survey by ONS 2018; most lorry drivers were not asked this question, and as a consequence, are not taken into account in the results for 'car/vehicle you/group brought to the UK

1.2 Getting around Britain: purchase of transport and package tours

Transport services purchased before or during trip (%)



International Passenger Survey by ONS, VisitBritain/IPSOS 2016, base: visitors

Public transport is a favourable method used to get around towns/cities amongst Canadians. Compared to the market average, they are more likely to use public transport outside towns/cities.

Canadian visitors have a strong propensity to take taxis, with 1 in 3 visitors taking a taxi during their visit.

Compared to the market average, Canadians are twice as likely to hire a car and a private coach.

Canadians are more likely to pre-book the majority of transport services within the UK with the exception of transport within London.

Transportation from the airport was the most commonly booked mode of transport in the UK with 1 in 3 visits from Canada having booked before arrival to the UK.

1.3 Visitor demographics

Visitor characteristics

Canadian visitors tend to be older than the average visitor to the UK: 34% of Canadian visitors were aged 55+ in 2018, compared to the all market average of 20%.

The largest proportion of Canadian visitors who came to the UK in 2015 reside in Ontario (48%), followed by British Columbia (19%).

84% of visits from Canadian residents to the UK were made by Canadian nationals, 8% by British nationals.

6 out of 10 Canadian holiday visitors (excl. UK nationals) were making a repeat visit to Britain in 2015.

Canadians are more likely to travel to Britain with their spouse/partner than the global average (39% vs 28%).

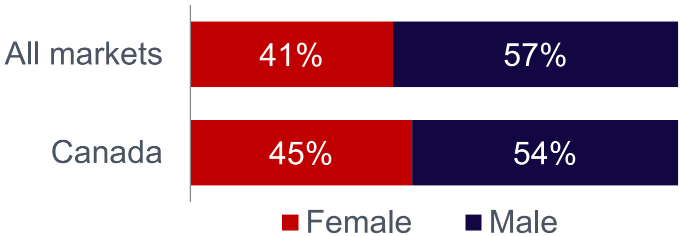
97% of departing Canadian holidaymakers in 2017 were either 'very' or 'extremely' likely to recommend Britain for a holiday or short-break.

39%
of Canadians travelled with their spouse/partner in 2017

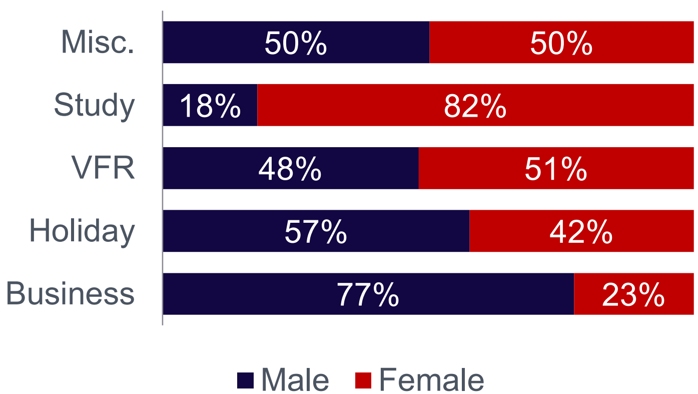
Source: International Passenger Survey by ONS

1.3 Visitor demographics: gender and age groups

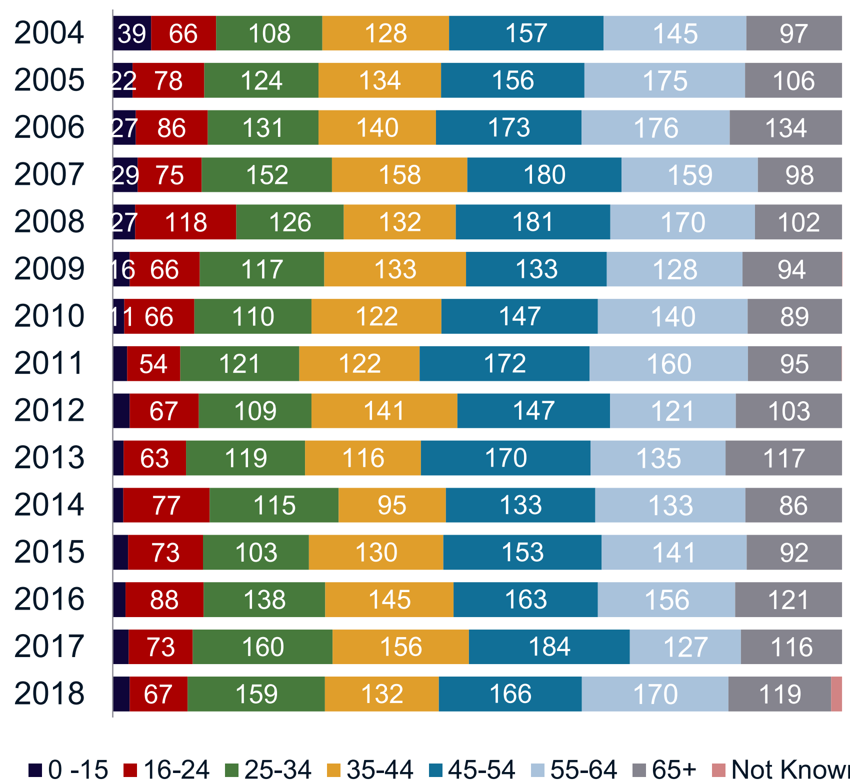
Gender ratio of visits (2018):



Gender ratio of visits from Canada by journey purpose (2018):



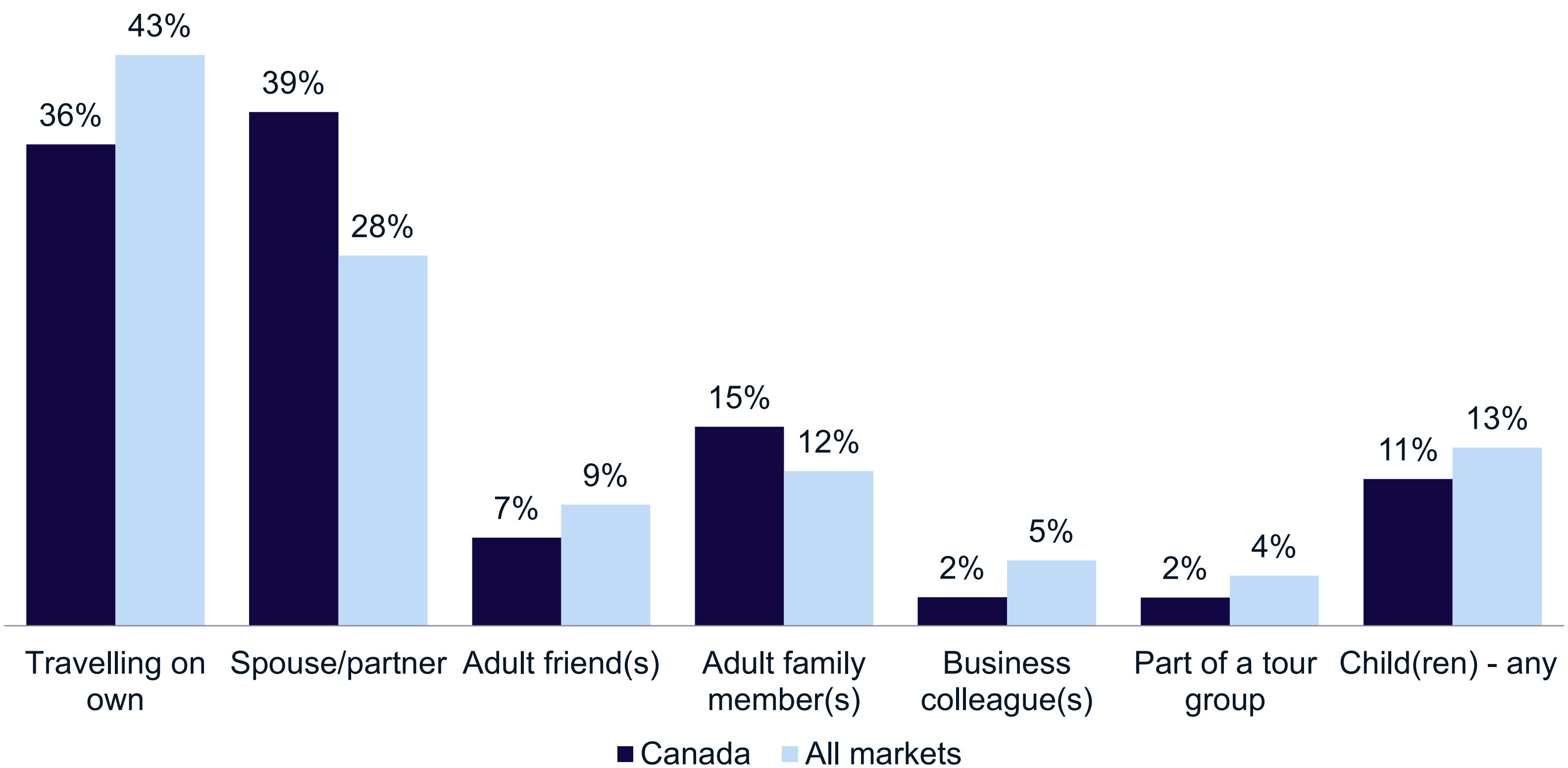
Age group trend (visits in 000s)



Source: International Passenger Survey by ONS

1.3 Visitor demographics: travel companions

Who have Canadian visitors to the UK travelled with?



Source: International Passenger Survey by ONS, 2017, Who accompanied you on your visit to the UK, excluding UK residents you may have visited during your trip?

1.3 Visitor demographics: origin

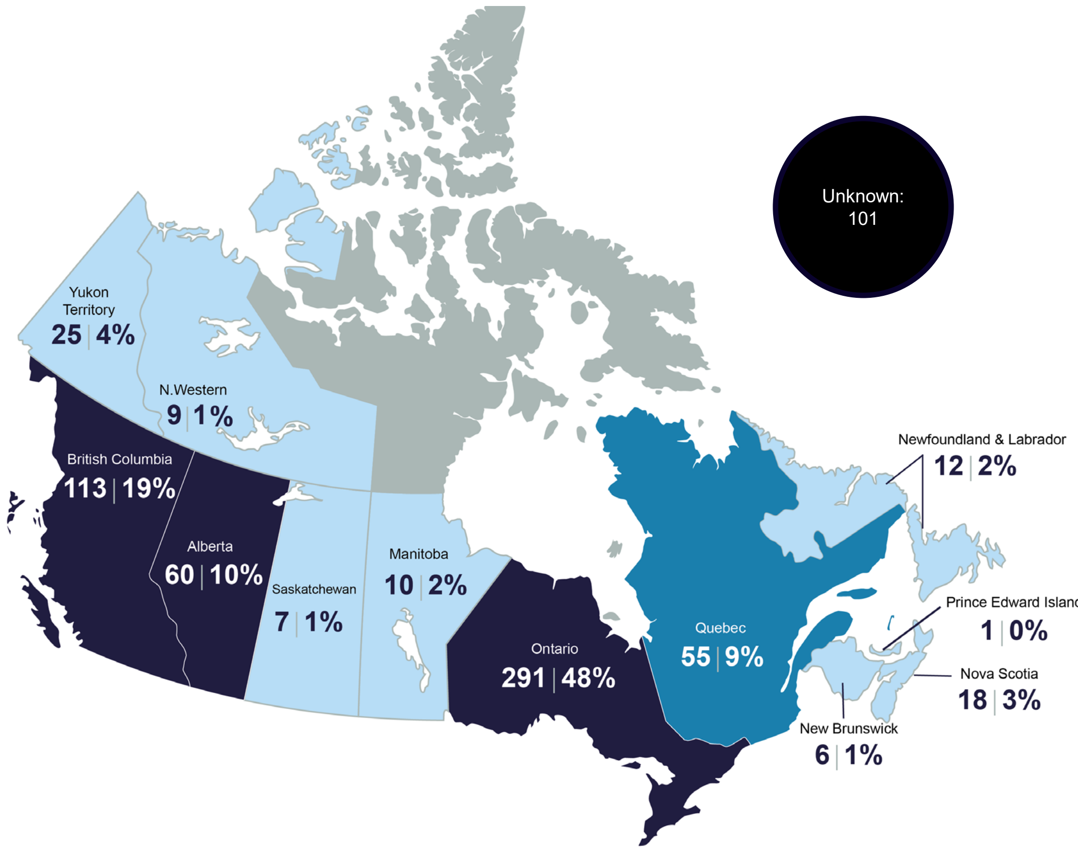
Visits to the UK in 2015 (000s)

The largest proportion of Canadian visitors who came to the UK reside in Ontario. This province generated almost half all inbound visits from Canada in 2015. Almost one fifth of the Canadian visitors came from British Columbia.

Connectivity reflects these largest source regions.

Visits in 000s | % share of visits

- High
- Medium
- Low



Source: International Passenger Survey by ONS, 2015

1.4 The UK and its competitors

Market size, share and growth potential

Britain was the 8th most visited international destination by Canadian tourists in 2018, behind the USA, Mexico, Cuba, France, Italy, Dominican Republic and China.

The visit forecast over the next decade (+45%) implies ongoing YOY growth in the number of Canadian overnight visits to Britain.

Of those who came to Britain for a holiday, 43% considered Ireland, 42% France, 30% Germany, 27% Italy and 26% Spain as an alternative holiday destination.

Among the competitor set, Italy, Spain, India, China and Ireland recorded growth in market share in terms of Canadian outbound overnight trips in the past decade (2008-2018). Markets that lost market share include the UK, France and Germany.

Canadians have an above average propensity to visit the UK as part of a multi-country trip.

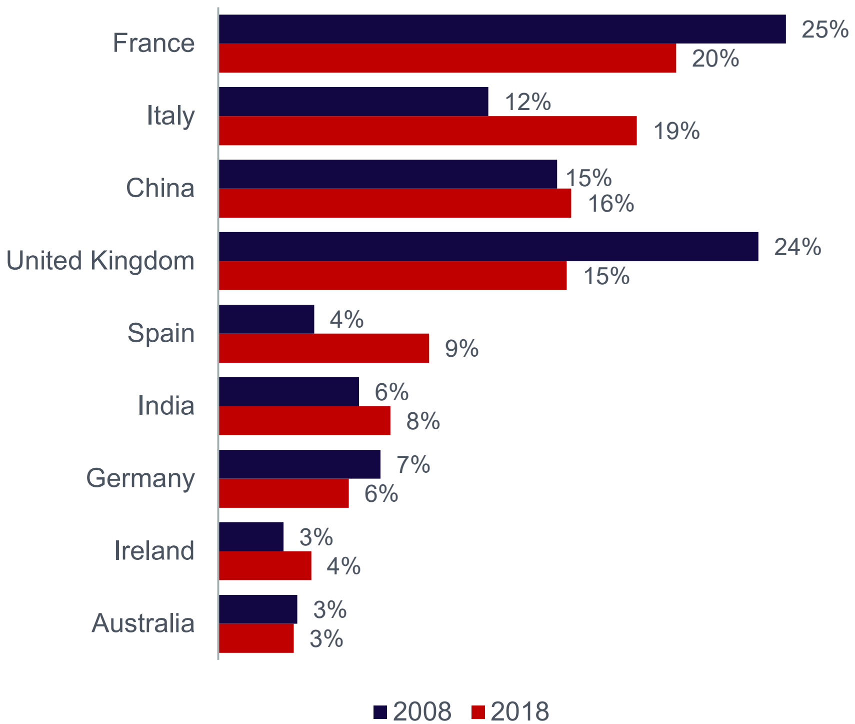
Britain ranks 8th

for Canadian outbound destinations by overnight trips

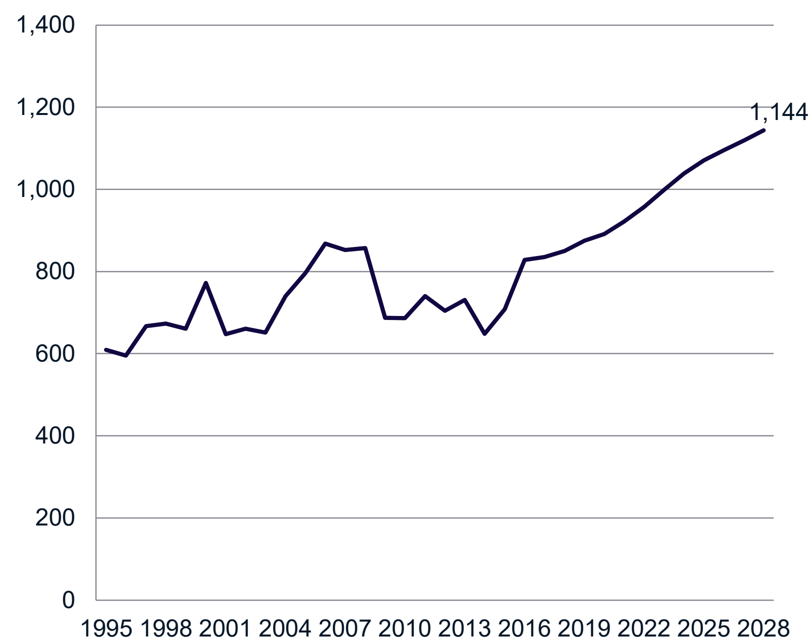
Source: Oxford Economics (based on overnight trips), VisitBritain/IPSOS 2016

1.4 The UK and its competitors

UK's market share of Canadian overnight visits among competitor set



Historic and potential visits to the UK (000s)

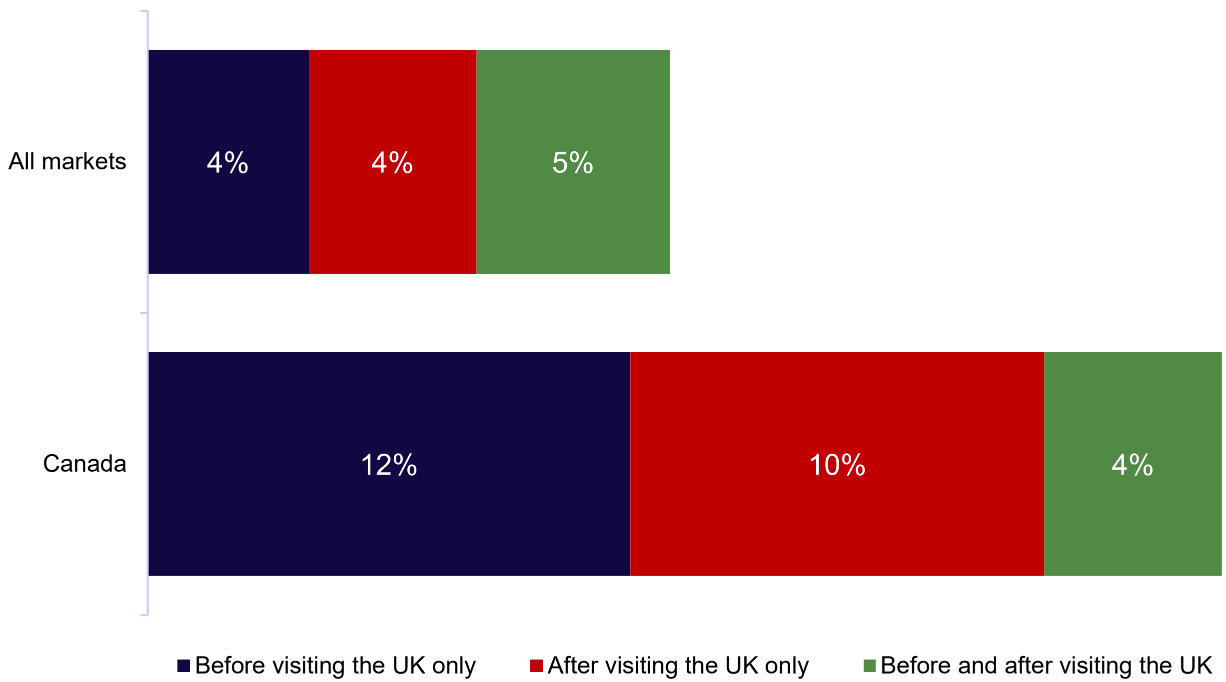


Source: Oxford Economics for competitor set based on overnight visits,
Historic and potential visits display total visits based on International Passenger Survey, Oxford Economics and VisitBritain data adaptations

1.4 The UK and its competitors

Propensity for Canada travellers to visit the UK as part of a multi-country trip

% visits which included at least a night in another country…



Source: International Passenger Survey by ONS, 2016

Chapter 2
Experiences and perceptions

2.1 Inbound activities

Dining in restaurants, shopping and going to a pub are the most popular activities for Canadian visitors while in the UK, with 76%, 61% and 55% doing so.

Canadian visitors are much more likely than the average UK visitor to go to built heritage sites and museums, and to visit castles or historic houses.

Four out of ten visits involve time in a park or garden. Canadians are also twice as likely as the average UK customer to visit a National Park.

Almost 1 in 2 Canadians enjoy socialising with locals.

Around 16,000 visits per year feature time watching football.

Top 10 activities for Canadian visitors during their visit to the UK

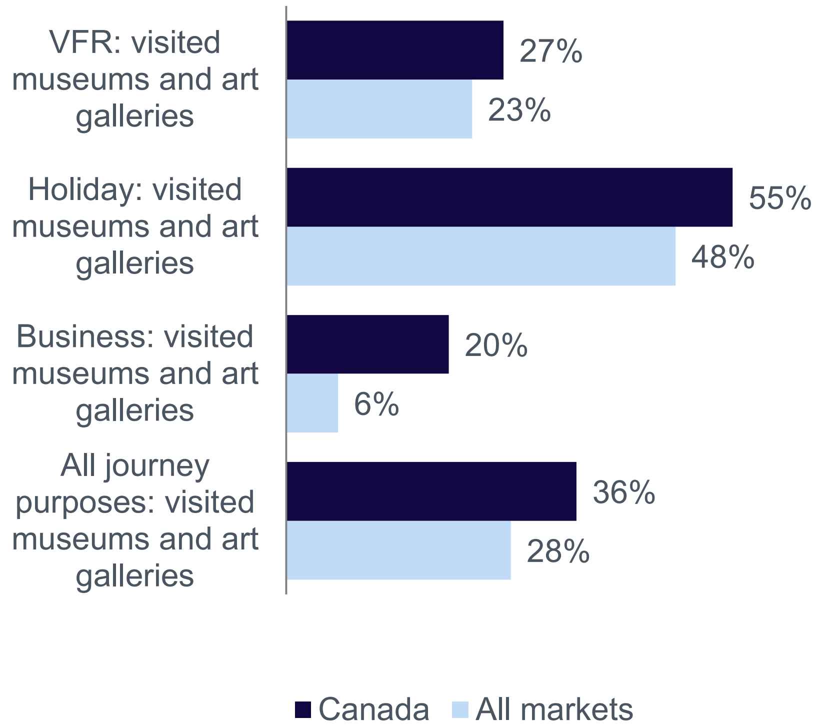
1. Dining in restaurants
2. Going shopping
3. Going to the pub
4. Sightseeing famous monuments/ buildings
5. Socialising with locals
6. Visiting parks or gardens
7. Visiting castles or historic houses
8. Visiting museums or art galleries
9. Visiting religious buildings
10. Going to countryside or villages

For more information on activities, please consult: https://www.visitbritain.org/activities-undertaken-britain

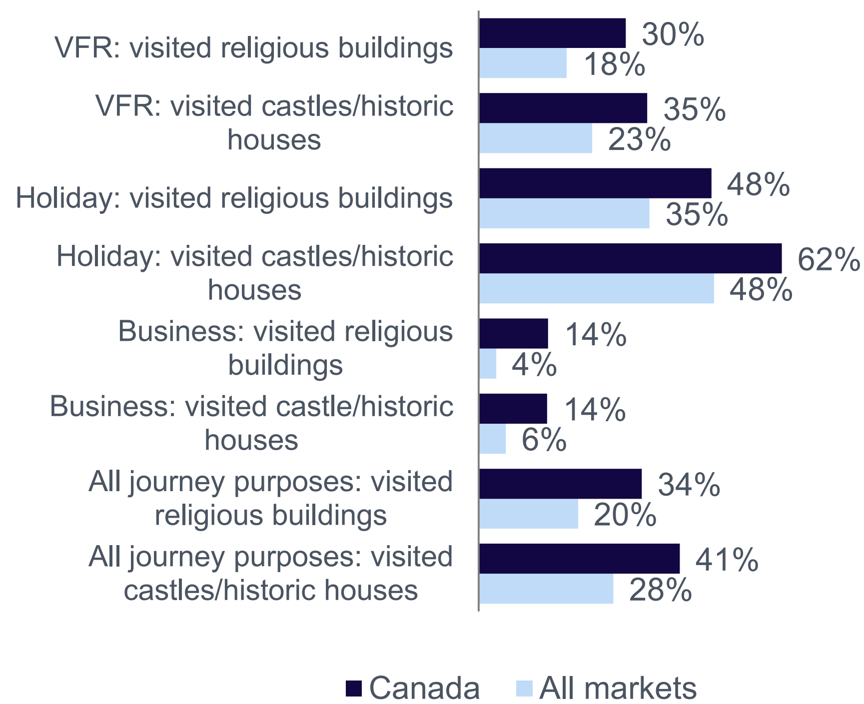
Source: International Passenger Survey by ONS, rankings based on 2007-2017 data,

2.1 Inbound activities

Propensity to visit museums and galleries



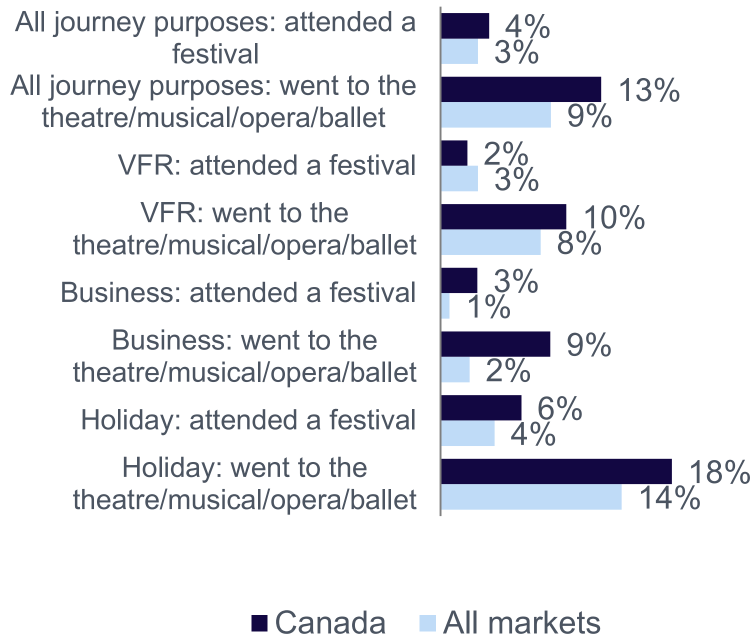
Propensity to visit built heritage sites



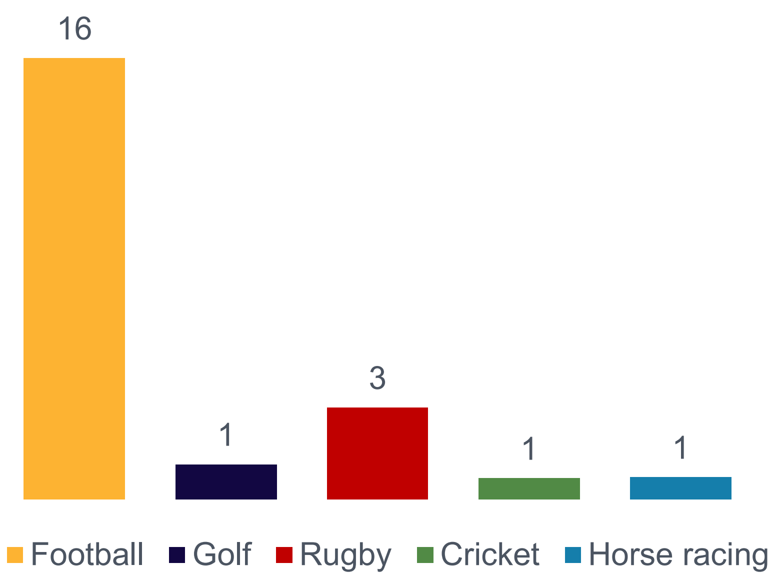
Source: International Passenger Survey by ONS 2016

2.1 Inbound activities

Propensity to attend the performing arts



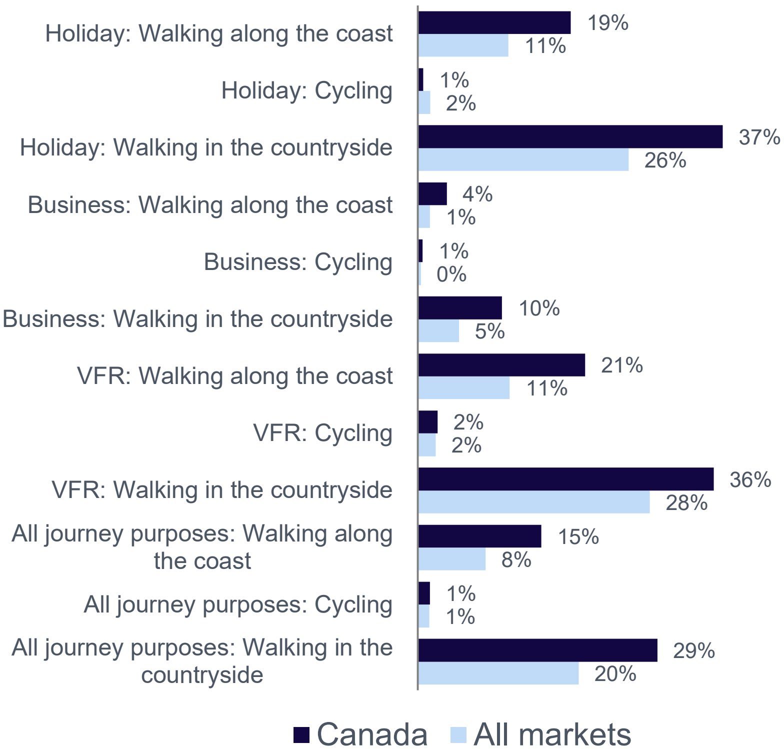
Number who went to watch sport live during trip (000s)



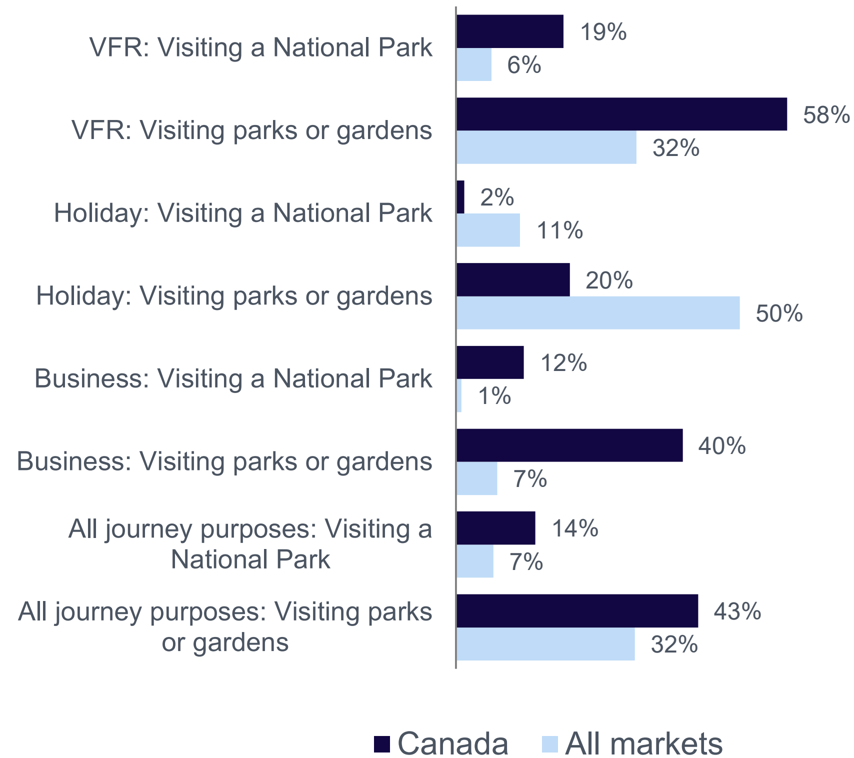
Source: International Passenger Survey by ONS 2011 and 2016

2.1 Inbound activities

Propensity to go for a walk or cycle



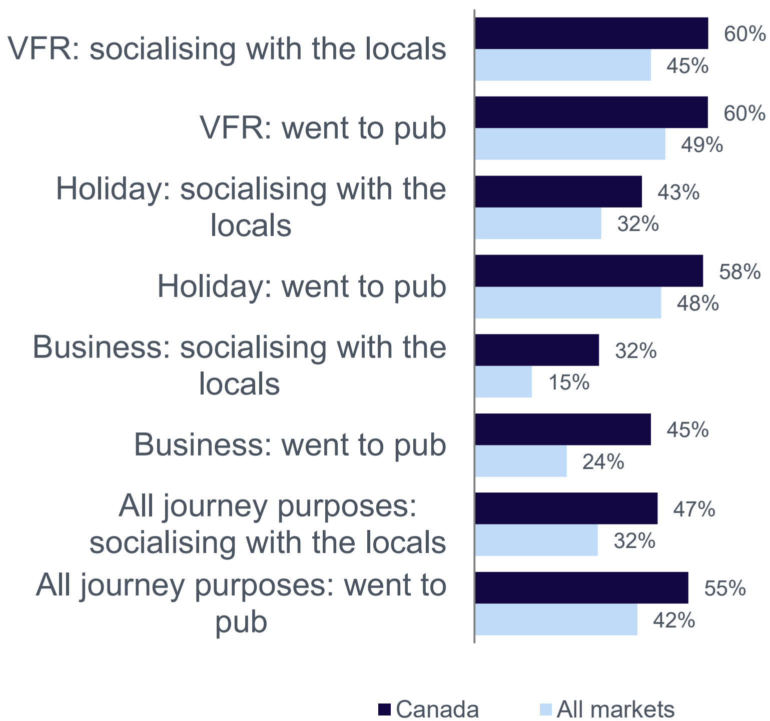
Propensity to visit a park or garden and a National Park



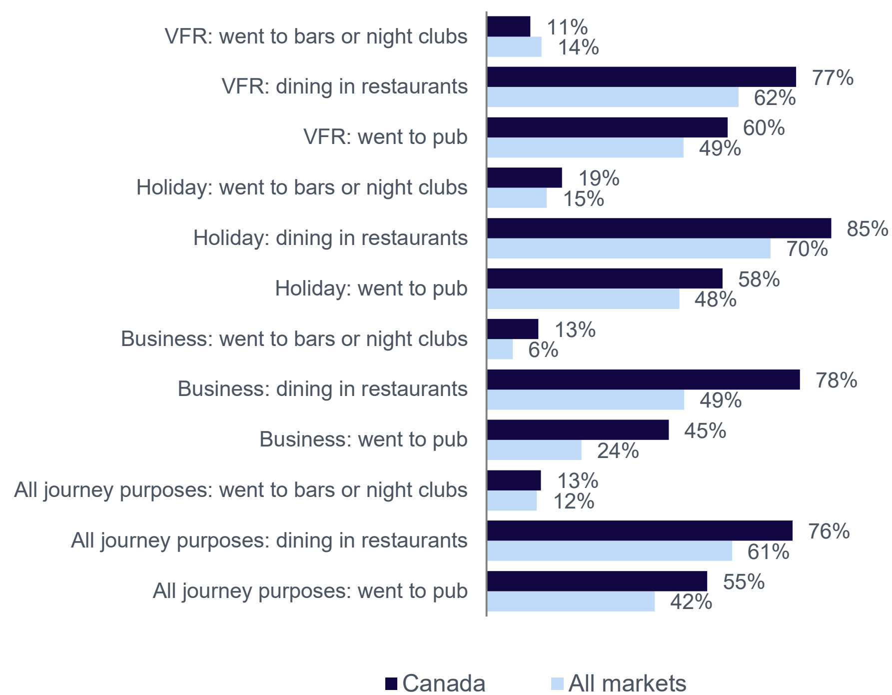
Source: International Passenger Survey by ONS 2010 and 2016

2.1 Inbound activities

Propensity to go to a pub and socialise with locals



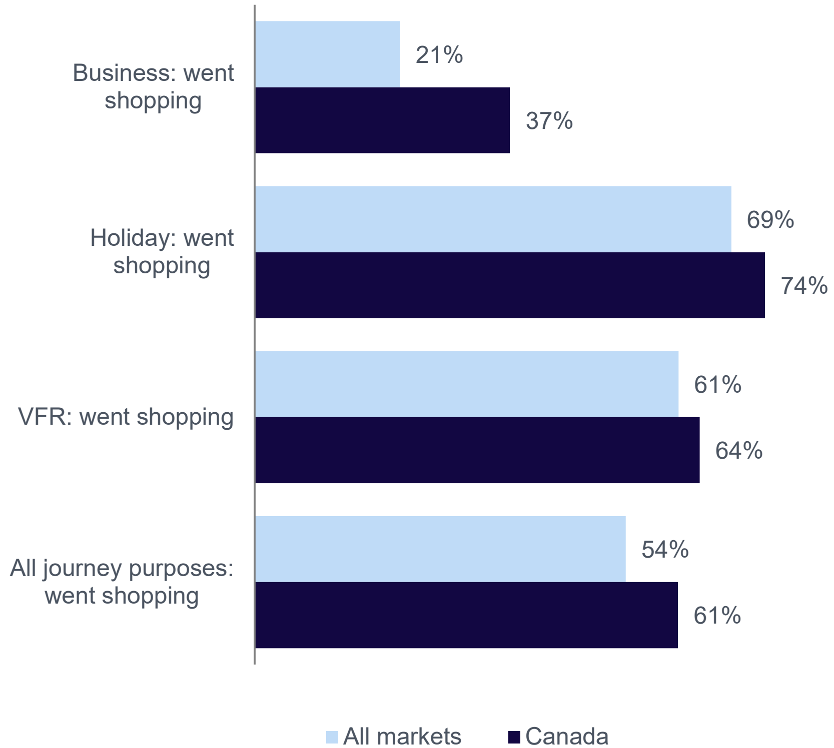
Propensity to go dining in restaurants, or to go to bars or night clubs



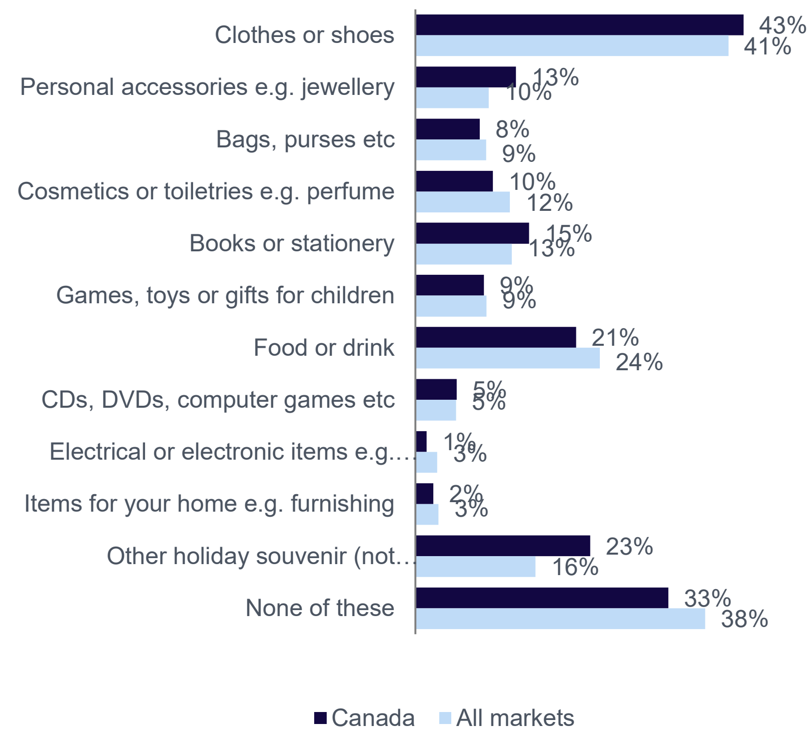
Source: International Passenger Survey by ONS, 2008 (dining in restaurants) and 2017 (all other activities)

2.1 Inbound activities

Propensity to go shopping during visits to the UK

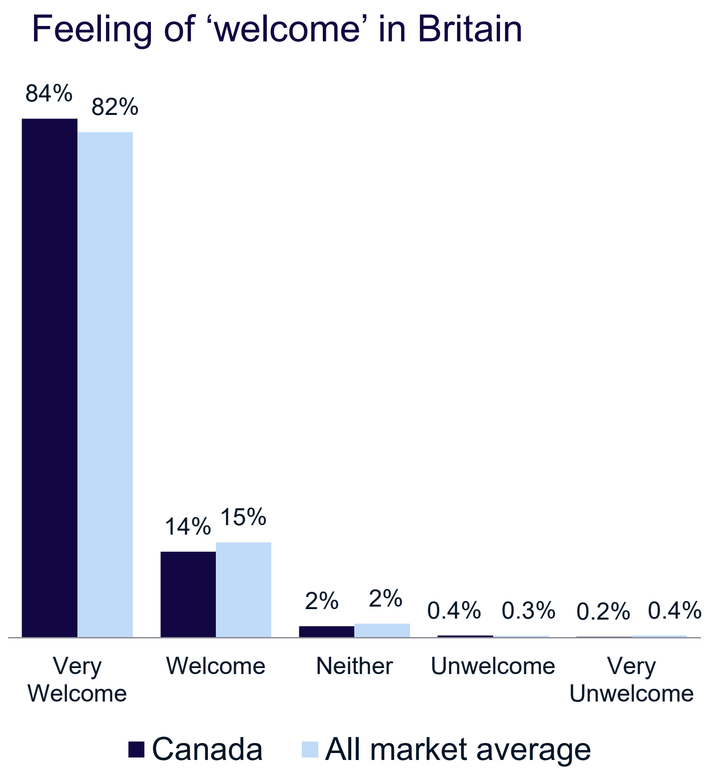


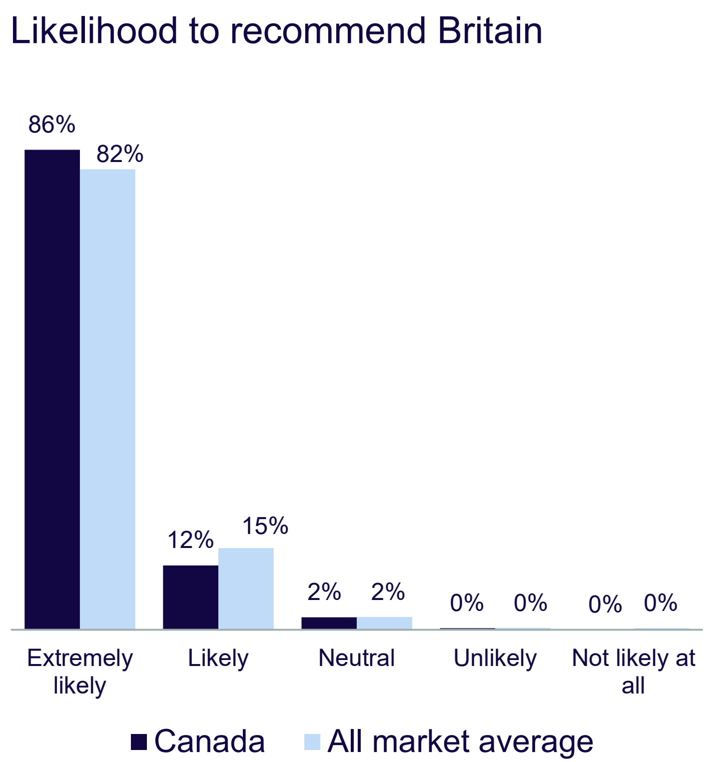
Propensity to purchase selected items



Source: International Passenger Survey by ONS, 2017 (shopping) and 2013 (purchase of selected items)

2.2 Welcome and recommending Britain





Source: International Passenger Survey by ONS,

2.3 Perceptions of Britain

Canadians rated Britain 2nd out of fifty nations for Tourism and 4th for Culture and People. They ranked Britain highly for urban attractions (3rd) and historic buildings (4th) but less so for scenic natural beauty (21st).

The cultural product that Canadians most strongly associated with Britain is museums.

A trip to Britain would be expected to be ‘educational’, ‘fascinating’ and/or ‘exciting’ by many Canadians.

The USA and Australia are the destinations that Canadians consider the ‘best place’ for delivering the things they most want from a holiday destination.

Canadians rate Great Britain highly for being a good place to visit world famous sites and history/ historic sites.

Activities that appeal to potential visitors from Italy include driving through the countryside of England, riding the scenic ‘Hogwarts Express’, taking a canal boat tour through the waterways of England and enjoying a traditional afternoon.

Britain is the
2nd strongest nation brand
among 50 nations

Source: Anholt Nation Brands Index, powered by Ipsos 2018, Arkenford 2013, VisitBritain/IPSOS 2016

2.3 Perceptions of Britain

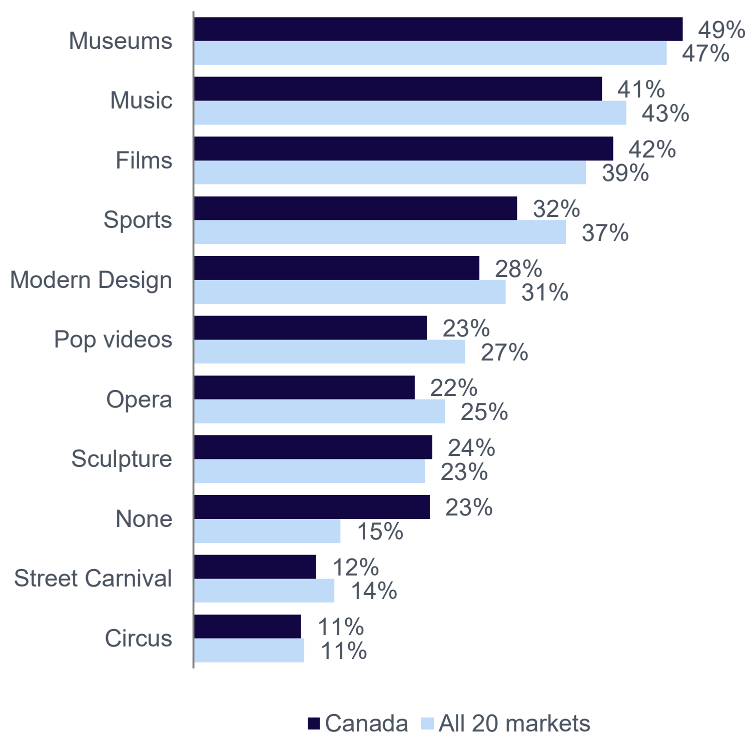
UK's ranking (out of 50 nations)

Measure	Canadian respondents	All respondents
Overall Nation Brand	**6**	**4**
Culture (overall)	**7**	**5**
The country has a rich cultural heritage	10	7
The country is an interesting and exciting place for contemporary culture such as music, films, art and literature	6	3
The country excels at sports	7	5
People (overall)	**9**	**7**
If I visited the country, the people would make me feel welcome	13	16
Tourism (overall)	**7**	**4**
Would like to visit the country if money was no object	9	6
The country is rich in natural beauty	21	26
The country is rich in historic buildings and monuments	5	5
The country has a vibrant city life and urban attractions	6	4

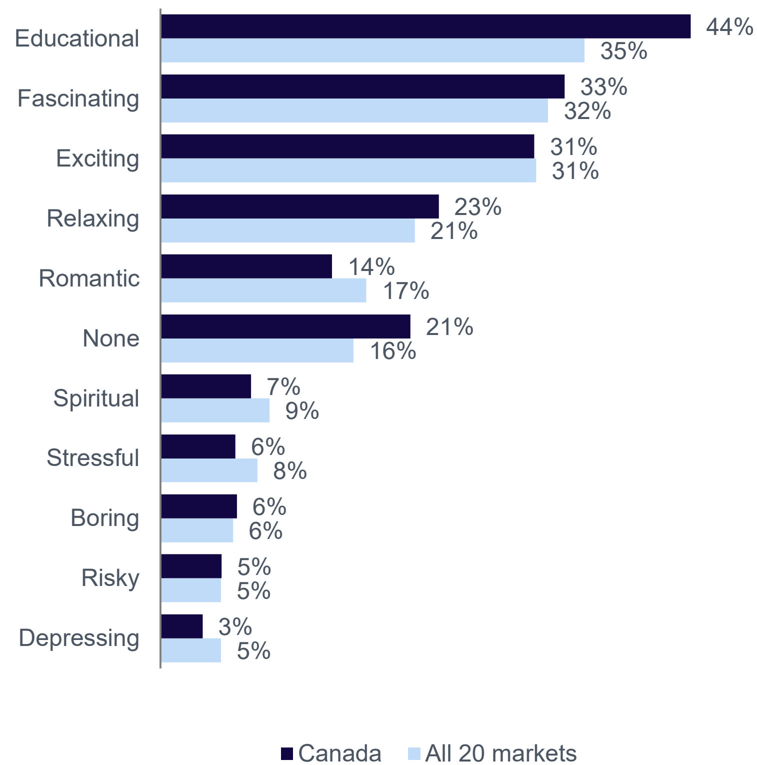
Source: Anholt Nation Brands Index, powered by Ipsos 2019

2.3 Perceptions of Britain

Cultural associations with the UK



Adjectives describing a potential trip the UK



Source: Anholt Nation Brands Index, powered by Ipsos 2018

2.3 Perceptions of Britain

Holiday wants and % saying destination is best place for…

Importance	Attribute (20 most important)	GB	FR	IT	AU	US	GE
6.17	Have fun and laughter	14%	11%	15%	31%	38%	11%
6.15	Offers good value for money	8%	10%	12%	13%	46%	9%
6.12	Enjoy the beauty of the landscape	27%	38%	54%	59%	29%	22%
6.00	The people are friendly and welcoming	24%	19%	28%	44%	25%	15%
5.99	Explore the place	31%	27%	37%	42%	24%	17%
5.96	Do something the children would really enjoy	24%	19%	26%	41%	62%	15%
5.88	See world famous sites and places	56%	60%	63%	26%	29%	39%
5.85	Experience things that are new to me	22%	34%	43%	56%	16%	32%
5.78	Enjoy local specialities (food and drink)	16%	53%	67%	20%	18%	34%
5.75	Soak up the atmosphere	24%	39%	49%	49%	16%	13%
5.75	Enjoy peace & quiet	9%	15%	19%	28%	18%	8%
5.72	It offers unique holiday experiences	32%	40%	48%	53%	33%	28%
5.68	Do what I want when I want spontaneously	13%	18%	16%	27%	47%	13%
5.66	Provides a wide range of holiday experiences	28%	33%	37%	41%	50%	24%
5.58	Broaden my mind/ Stimulate my thinking	30%	35%	42%	34%	20%	28%
5.57	Have dedicated time with my other half	32%	46%	47%	33%	37%	23%
5.55	Experience activities/places with a wow factor	25%	31%	42%	48%	23%	20%
5.55	Get some sun	5%	14%	26%	51%	39%	5%
5.54	Visit a place with a lot of history/historic sites	59%	58%	66%	15%	24%	41%
5.54	A good place to visit at any time of year	14%	20%	26%	38%	41%	13%
5.52	Enjoy high quality food and drink (gourmet food)	10%	64%	61%	11%	23%	15%
5.49	Chill/ slow down to a different pace of life	10%	14%	27%	24%	19%	5%

Source: VisitBritain/Arkenford 2013, base: international travellers from Canada

2.3 Perceptions of Britain

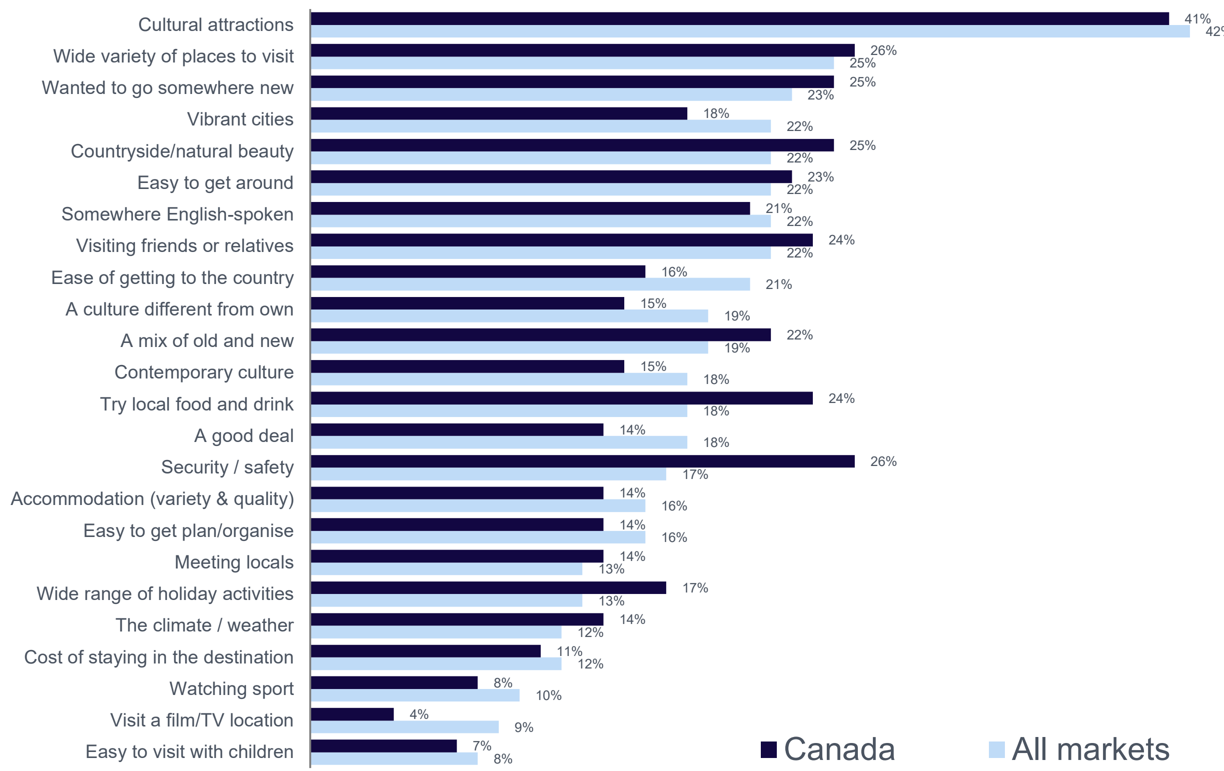
Holiday wants and % saying destination is best place for…

Importance	Attribute (20 most important)	GB	FR	IT	AU	US	GE
5.46	Be physically healthier	19%	24%	26%	33%	23%	16%
5.35	Feel connected to nature	17%	14%	15%	58%	37%	11%
5.32	Easy to get around by public transport	34%	26%	20%	14%	38%	21%
5.11	Revisit places of nostalgic importance to me	28%	12%	20%	6%	31%	8%
5.09	Feel special or spoilt	12%	30%	45%	34%	26%	10%
5.06	Meet the locals	13%	18%	20%	43%	55%	8%
5.03	Get off the beaten track	16%	13%	13%	50%	25%	11%
4.96	Good shopping	20%	34%	31%	12%	65%	10%
4.85	Visit places important to my family's history	30%	14%	13%	8%	16%	10%
4.58	Meet and have fun with other tourists	8%	7%	33%	41%	36%	29%
4.51	Do something environmentally sustainable/ green	12%	18%	21%	38%	27%	16%
4.49	Experience adrenalin filled adventures	17%	16%	24%	34%	25%	20%
4.44	Go somewhere that provided lots of laid on entertainment/nightlife	31%	31%	35%	28%	56%	23%
4.32	To participate in an active pastime or sport	26%	12%	18%	30%	53%	18%
4.13	Party	16%	29%	35%	30%	48%	20%
4.02	Fashionable destination	23%	56%	57%	26%	27%	14%
3.98	Do something useful like volunteering to help on a project	8%	17%	20%	19%	31%	11%
3.95	Watch a sporting event	19%	17%	20%	18%	68%	17%

Source: VisitBritain/Arkenford 2013, base: international travellers from Canada

2.3 Perceptions of Britain

Motivations for choosing Britain as a holiday destination



Source: VisitBritain/IPSOS 2016, base: visitors (Market scores have been adjusted so that the sum of all motivations for each market is equivalent to the global total, to enable meaningful comparisons)

2.3 Perceptions of Britain

Sought-after Britain activities

Source: Anholt Nation Brands Index, powered by Ipsos 2018; Rankings based on market-level scores that have been adjusted so that the sum of all activities for each market is equivalent to the all-market total, to enable meaningful comparisons, including across markets. Top 20 activities shown; for full list please see report at https://www.visitbritain.org/understanding-international-visitors

Chapter 3:
Understanding the market

3.1 Structural drivers: general market overview

Demographics & society

Canada's population reached 37.5 million in 2019 and is expected to grow gradually over the next decade. Immigrants, who primarily reside in the largest urban areas of Canada, will drive this growth.

Canada has an aging population with 18% aged 65 years or over compared to 16% of those aged under 15 years. The aging population is set to continue to grow with almost one in four seniors likely to be aged 85 or older by 2051.

Canada is a culturally diverse country. Over 20% of the total Canadian population is foreign-born.

Canada's economy experienced weak growth in 2018 influenced in part by US-China tensions and lower oil prices from a global slowdown. Economic growth is expected to remain below potential through 2020, then gradually return to a sustainable long term trend of about 1.5%.

The weaker pound following the Brexit vote has made it more affordable for Canadians to travel to Britain.

Canada has a population of 37.5 million people

Source: Oxford Economics, CIA World Factbook 2019, Statistics Canada

3.1 Structural drivers: demographic and social indicators

Population dynamics

Measure	2019 estimate
Total population	37.482,210
Overall growth rate vs 2018	+1.32%
Net No. migrants per 1,000 population in 2018	5.7
Average annual rate of population change in 2015 - 2020	1.20%

Indicator	2010	2020	2030	2050
Median age (in years)	36.9	41.1	43.0	45.5

The Canadian population reached 37.5 million in 2019 and is expected to grow in the next decade. Canada recorded the strongest population growth of all G7 countries in the period 2011-2016 (+6%)

Canada has an aging population with the median age expected to reach 45 by 2050. Canada's median age is slightly older than the USA's. In 2019, 18% of the population was aged 65 years or over compared to 16% of those aged 15 or under. It is projected that by 2051, one in four seniors will be aged 85+.

Over 20% of Canada's population is foreign born (the highest among the G8 countries). Historically immigrants from European countries accounted for most of the immigrant source countries but post-1970s its largest source of immigrants have come from Asia and the Middle East.

Canada has a high level of urbanisation with 83% of its population living in urban areas. Toronto and Montreal are the largest cities, holding almost 8% and 5% of Canada's population. Ontario is Canada's most populous province.

Source: Oxford Economics, CIA World Factbook 2019, Statistics Canada

3.1 Structural drivers: economic indicators

Economic indicators
(% growth unless stated)

Indicator	2018	2019	2020	2021
Real GDP	2.0%	1.7%	1.4%	1.6%
Consumer spending	2.1%	1.6%	1.5%	1.9%
Unemployment rate	5.8%	5.7%	5.8%	6.0%

Measure	2019
GDP per capita PPP (US$)	47,386
Annual average GDP growth over past decade (%)	2.2
Annual GDP growth in 2019 (%)	1.7

Canada's economy experienced weak growth in 2018 influenced in part by US-China tensions and lower oil prices from a global slowdown. Economic growth is expected to remain below potential through 2020, then gradually return to a sustainable long term trend of about 1.6%. Consumer spending is up but business confidence has been declining since April 2018.

The composition of Canada's economy is made up of services (70%), industry (28%) and agriculture (2%).

Many Canadians enjoy a high standard of living with GDP per capita in purchasing power parity terms of over 47,000 US Dollars, forecasted to increase in the years to come. This is around 80% of the GDP per capita of the USA.

According to Capgemini, Canada counted 362,000 High Net Worth Individuals (HNWI) in 2018 (down 4% on 2017); these are defined as people with investible assets worth more than $1 million. Canada ranks 8th place among the countries with the highest number of HNWI's.

Source: Oxford Economics, CIA World Factbook 2019, Trading Economics, Capgemni World Wealth Report 2019,

3.1 Structural drivers: exchange rate trends

Exchange rate trends (cost of GBP in CAD)

Please visit our website to find the most up-to-date exchange rate trend based on monthly averages

Source: Bank of England

3.2 Consumer trends

- Canada's outbound travel market grew 7% between 2013 and 2018, and is forecasted to grow by 12% in the next five years.
- An important reason for the growing outbound travel market is recent economic growth, boosting Canadian consumer spending, as well as a strong dollar.
- A growing segment of Canada's outbound travel market are those aged 65 years and older. This group has a natural interest in Europe's history.
- The USA has always been the most popular outbound destination for Canada, receiving 55% of Canadian overnight trips abroad in 2018. Other American destinations such as Mexico, Cuba and the Dominican Republic are also popular. Within Europe; France, Italy and the United Kingdom are favourite destinations for Canadian overnight visitors.

Most Canadian outbound trips are from **Ontario, British Columbia** and **Quebec.**

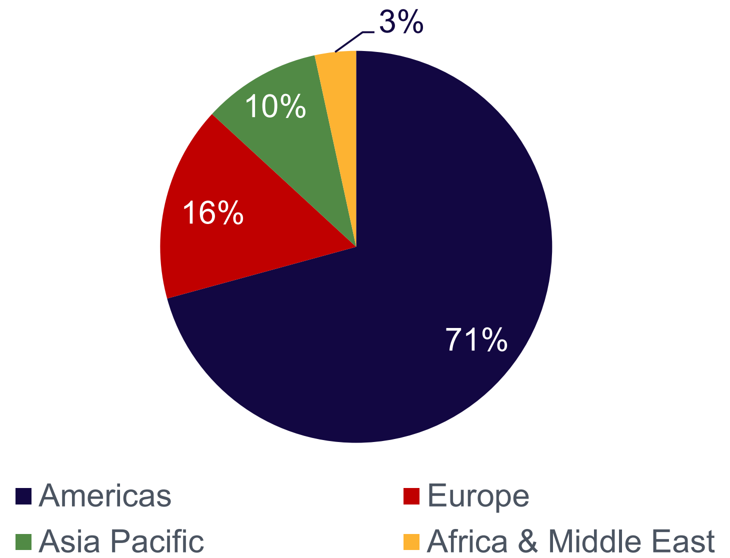
Sources: Oxford Economics, Statistics Canada

3.2 Consumer trends: overall travel trends

Travel trends

- Almost 6 in 10 overnight outbound trips from Canada were made for leisure purposes in 2018.
- Those born between 1946 and 1965, the so called baby boomers, are gradually retiring. This age group has a high desire to travel and moreover, often have the financial resources to do so. Europe's history, culture, gastronomy and scenic beauty are appealing to these older travellers and their propensity to research their ancestry is relatively high.
- Canada is a culturally diverse country, with over 20% of the total Canadian population being foreign-born. This explains the relatively high demand for travel to visit friends and relatives in their country of origin.
- Nearly three quarters of overnight trips outside Canada were spent in the Americas in 2018, mostly in the USA. 16% of all overnight visits were spent in Europe in 2018.

Destination of overnight visits abroad in 2018



- 16% of overnight visits were spent in Europe in 2018. This share has slowly grown over the past few years.

Source: Statistics Canada, Conference Board of Canada, Oxford Economics, ETC

3.3 Booking and planning

- A large proportion of Canadian holiday visitors tend to start thinking about their trip early, with 59% doing this as early as half a year or more in advance.
- 37% of travellers booked in the three to six months window before the arrival to Britain. Almost one fifth of travellers booked last-minute (within one month before arrival).
- More than half of Canadian travellers to Britain book travel and accommodation together (52%), mostly online (71%).
- Canadian visitors book holiday activities both before and/or during their trip. Sporting tickets and guided sightseeing tours are more likely to be booked prior to the trip.

59%

of Canadian visitors start thinking about their trip to Britain **6+ months in advance**

Source: VisitBritain/IPSOS 2016, base: visitors

3.3 Booking and planning: booking channels and ticket sales

How trips to Britain were booked: travel only

Booking method	Canada	All markets
Online	79%	85%
Face-to-face	9%	10%
By phone	11%	4%
Don't know	2%	1%

Most Canadians book their trip to Britain online, especially when they book their transport. The majority of online bookings are made via a laptop/desktop; Canadians are less likely to use mobile devices to make bookings.
More than half of Canadian visitors to Britain book their travel and accommodation together (52% of visitors). About one in five bookings were made face to face for these holiday packages.

How trips to Britain were booked: accommodation only

Booking method	Canada	All markets
Online	66%	70%
Face-to-face	6%	7%
By phone	5%	3%
Did not book/stayed with friends/relatives	23%	17%
Don't know	0%	2%

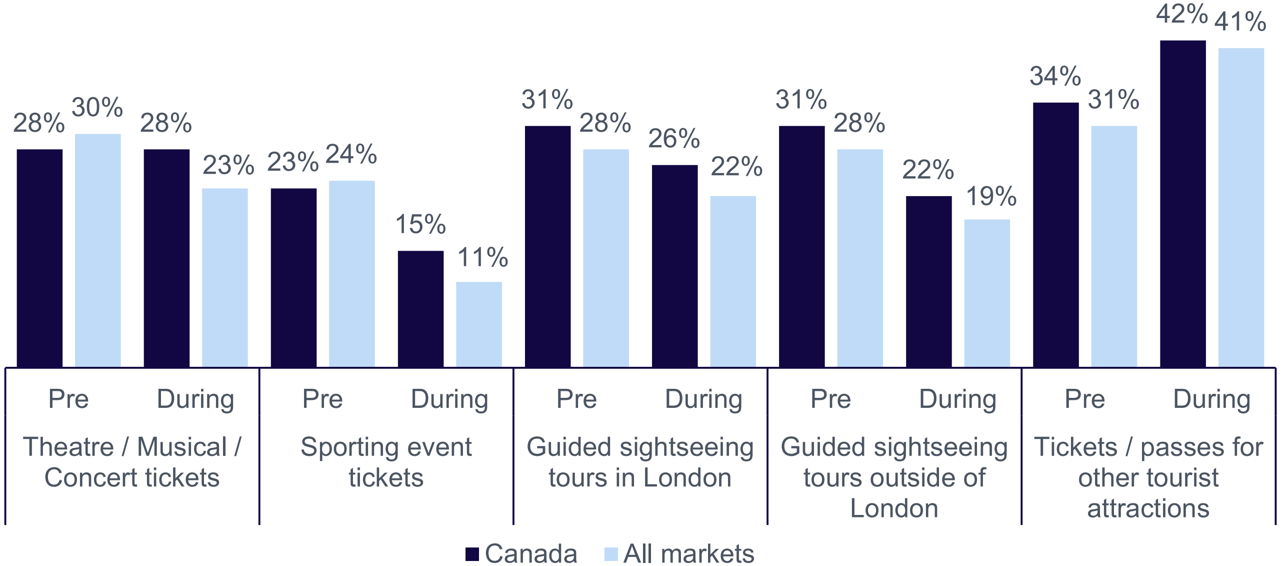
How trips to Britain were booked: travel and accommodation (holiday)

Booking method	Canada	All markets
Online	71%	64%
Face-to-face	21%	27%
By phone	7%	8%
Don't know	1%	1%

Source: VisitBritain/IPSOS 2016, base: visitors (if not otherwise specified), online survey

3.3 Booking and planning: booking channels and ticket sales

Propensity to make a purchase before or during trip



Many Canadian visitors book holiday activities before and/or during their trip.
Sporting tickets and guided sightseeing tours are more likely to be booked prior to the trip. Tickets or passes for other tourist attractions are more likely to be booked during the trip. An equal share of tickets for theatre, musicals and concerts are being booked prior or during the trip.

Source: VisitBritain/IPSOS 2016, base: visitors (if not otherwise specified), online survey

3.3 Booking and planning: lead-times

Decision lead-time for visiting Britain

Starting to think about trip

Lead time	Canada	All markets
6+ months	59%	45%
3-6 months	29%	31%
1-2 months	6%	13%
Less than 1 month	5%	5%
Don’t know	1%	3%

Deciding on the destination

Lead time	Canada	All markets
6+ months	42%	32%
3-6 months	37%	38%
1-2 months	14%	19%
Less than 1 month	5%	7%
Don’t know	2%	3%

Looking at options/prices

Lead time	Canada	All markets
6+ months	28%	21%
3-6 months	39%	37%
1-2 months	23%	27%
Less than 1 month	8%	12%
Don’t know	2%	4%

Booking the trip

Lead time	Canada	All markets
6+ months	18%	14%
3-6 months	37%	32%
1-2 months	24%	28%
Less than 1 month	19%	21%
Don’t know	2%	5%

Source: VisitBritain/IPSOS 2016, base: visitors

3.3 Booking and planning: lead-times

Decision lead-time for visiting Britain: commentary (tables on previous page)

Canadian travellers to Britain show a higher tendency to start thinking earlier about their trip to Britain than the global average. 59% start thinking about their trip more than six months in advance compared to 49% across all markets.

42% of Canadian travellers made their decision to travel to Britain more than six months before the actual journey; another 37% made their decision three to six months before departure.

Almost 4 in 10 Canadian visitors looked at options and prices between three and six months ahead of the trip and an almost equal share booked their trip in that same time frame.

More than half of Canadians book their travel and accommodation together. 55% of Canadians that book such a combined holiday make use of a travel agent / tour operator / travel comparison website. 23% book their combined holiday directly with the transport company and another 22% book directly with the accommodation provider.

Source: VisitBritain/IPSOS 2016, base: visitors

3.4 Reaching the consumer

Friends and relatives play an important role for Canadian travellers when choosing their destination. Other influential sources for destination choice are price comparison websites, websites providing travellers' reviews and information from search engines.

Over three quarters of Canadians aged 18 years or over own a smartphone and more than half own a tablet.

In 2018, time spent with digital media grew 2.6% in Canada and surpassed that of traditional media for the first time. Mobile makes up almost a third of all media time, exceeding 3 hours a day.

Almost half of Canadians say they purchased a product or service online using their mobile device – up from just 12% in 201.

Facebook and YouTube are the most used social media platforms in Canada, followed by Instagram and Twitter.

Mobile makes up one third of all media time for Canadians

Source: VisitBritain/IPSOS 2016, Insights West, eMarketer, CIRA

3.4 Reaching the consumer

Broadcast media

- Canadians aged 18+ spent on average 27 hours per week watching TV.
- Online TV viewing has increased significantly with those aged 18+ watching 3.4 hours of Internet television per week.

Newspapers

- Around 9 out of 10 adults read newspapers, in either print or digital format, at least once a week.
- 83% of newspaper readers are accessing at least some of their newspaper content online.
- Millennial readership peaks early in the morning and Boomer readership peaks early and late in the day
- Daily newspapers with the highest number of circulations in 2019 were The Globe and Mail, Toronto Star, La Presse, Le Journal de Montréal, 24 Hours Toronto and Metro Toronto.

Radio

- Radio is an important media channel for Canadians - those aged 18+ listened to 15 hours of radio per week.
- This time is being spent on AM/FM radio (61%), owned music e.g. CDs or digital music files (16%), streaming audio (9%), TV music channels (6%) or other audio sources (8%).
- Digital radio is a growing channel with 38% of 16-34s owning a digital radio.

Source: CTRC, Foresight Factory, Edison research – share of ear, News Media Canada, Agility PR solutions, Insights West

3.4 Reaching the consumer

Magazines

- Chatelaine, Canadian Living, Style At Home, Zoomer, Coupe De Pouce, Canadian House & Home, Maclean's and Reader's Digest (Canadian English Edition) are among the Canadian magazines with the highest circulation.

Online media

- 88% of internet access of on desktops/laptops whilst 82% is spent on smartphones.
- The social networks with the highest weekly usage in Canada are Facebook (82%), YouTube (63%), Instagram (39%), Twitter (29%) and Pinterest (20%).
- Messaging apps are growing in Canada – Facebook Messenger, Skype, iMessage and Whatsapp are the most used.

Source: CTRC, Foresight Factory, Edison research – share of ear, News Media Canada, Agility PR solutions, Insights West

3.4 Reaching the consumer: social media on holiday

Use of social media on holiday

- Almost 7 out of 10 Canadian international travellers used social media during their last holiday abroad, on par with the all-market average.
- 42% of international travellers from Canada used social media during their holiday to keep in touch with people at home. 35% of Canadian travellers used social media to post or upload photos of their holiday.
- Facebook dominates the social media platforms in Canada in terms of daily usage, followed by YouTube, Instagram and Twitter.
- In general, 46% of Canadian international travellers tend to use the tablet/smartphone for general internet use rather than a laptop/desktop. This is lower than the global average (56%).
- In general, 39% enjoy writing reviews of places they have been to on holiday on social media and 58% place trust in social media reviews from other tourists.

Source: VisitBritain/IPSOS 2016, base: all respondents: Have you used social media in any of the following ways whilst on your last holiday to Britain (visitors) /on your last holiday to a foreign destination (considerers)?

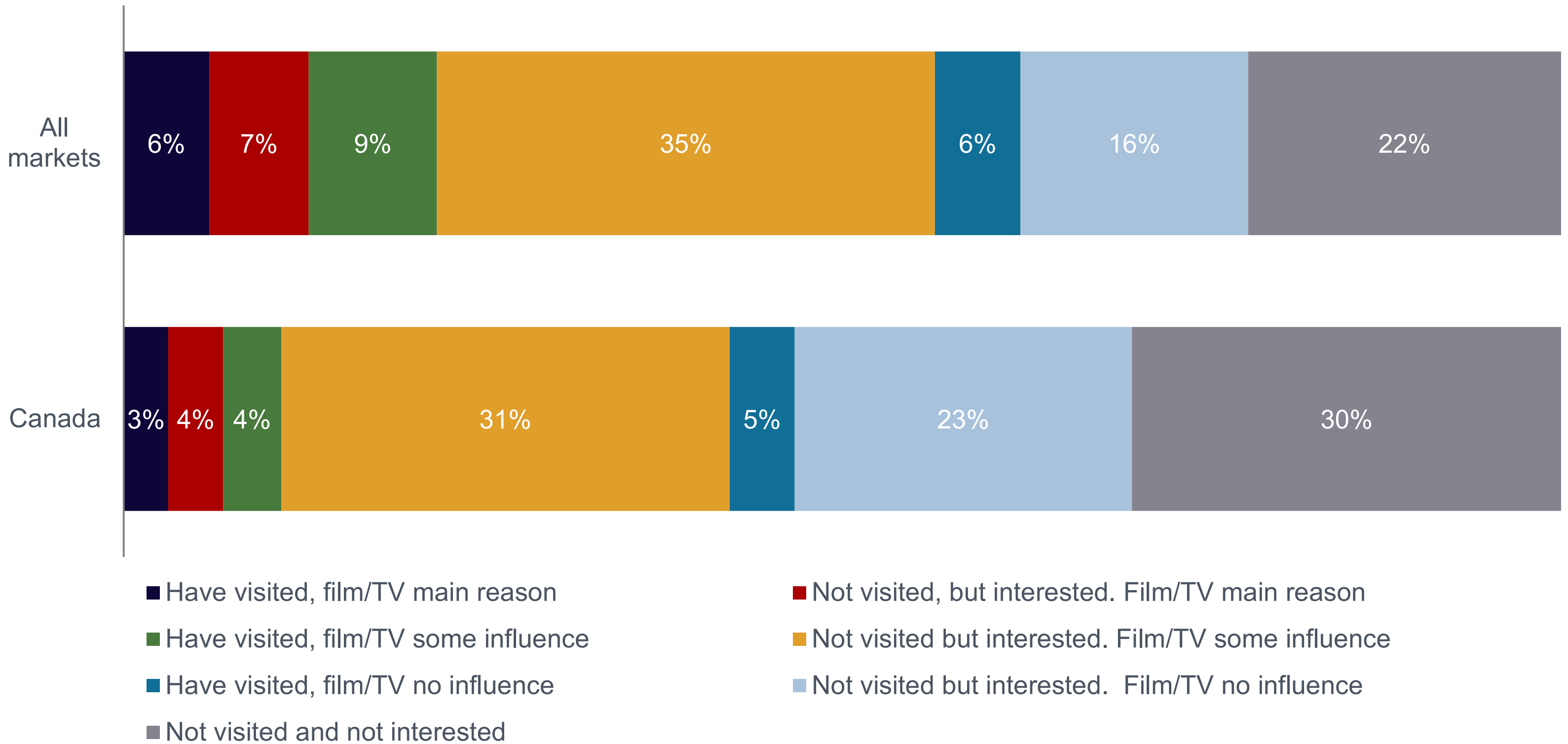
3.4 Reaching the consumer: influences

Influences on destination choice

Source: VisitBritain/IPSOS 2016, base visitors & considerers. Which of the following sources influenced your choice of destination? (Market scores have been adjusted so that the sum of all influences for each market is equivalent to the global total, to enable meaningful comparisons)

3.4 Reaching the consumer: influences

Likelihood to visit a place featured in a movie, TV series or book



Source: Anholt Nation Brands Index 2017: Have you ever visited a film or TV location whilst on a holiday/vacation abroad? If yes: To what extent was the film or TV location a reason for you choosing to take a trip to that destination? If no but would be interested: To what extent would a film or TV location be the reason for you choosing to take a trip to a specific destination?

Chapter 4:

Access and travel trade

4.1 Access: key facts

93% of Canadian visitors travel to the United Kingdom by plane. Another 4% arrive through the Channel Tunnel and 2% by ferry, likely as part of a multi-country trip.

Annual airline capacity from Canada stood at 2.1 million seats in 2019. Over the past 5 years (2014-2019) this has increased by 14%.

The two main airports in London (London Heathrow and London Gatwick) had 90% of market share in terms of seat capacity from Canada to the UK in 2019.

Manchester International Airport is a growing gateway for Canadian travel to the UK, surpassing 100,000 seats in 2019 (up 6% on 2018).

Glasgow International Airport and Edinburgh airport received the remaining 5% market share in 2019.

93% of Canadian visitors travel to the UK by plane.

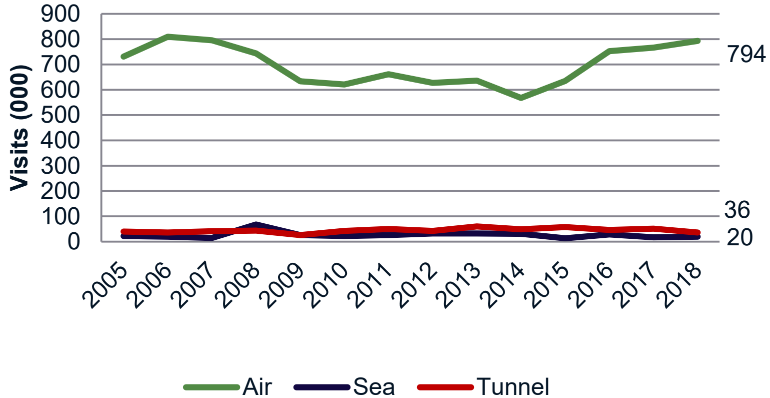
Access to Britain*

Measure	2019
Weekly aircraft departures	136
Weekly aircraft seat capacity	39,661
Airports with direct routes in Canada	9
Airports with direct routes in Britain	5

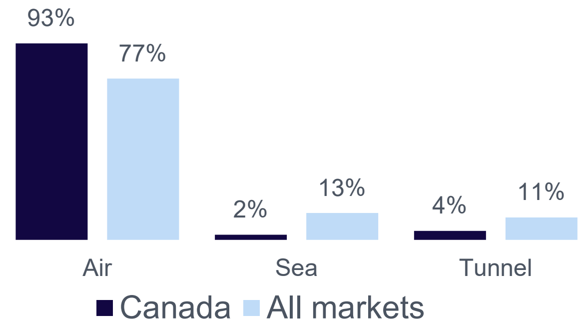
Source: International Passenger Survey by ONS, Apex 2019: non-stop flights only

4.1 Access: mode of transport

Visits by mode of transport

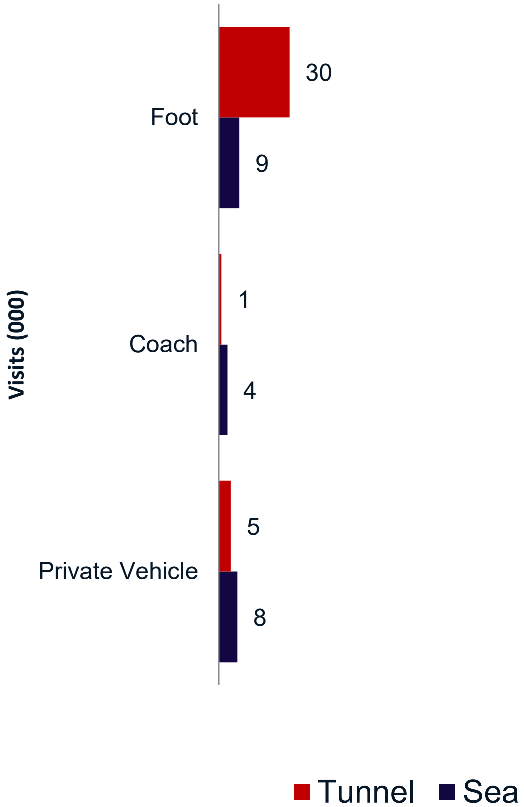


Annual share by mode (2018)



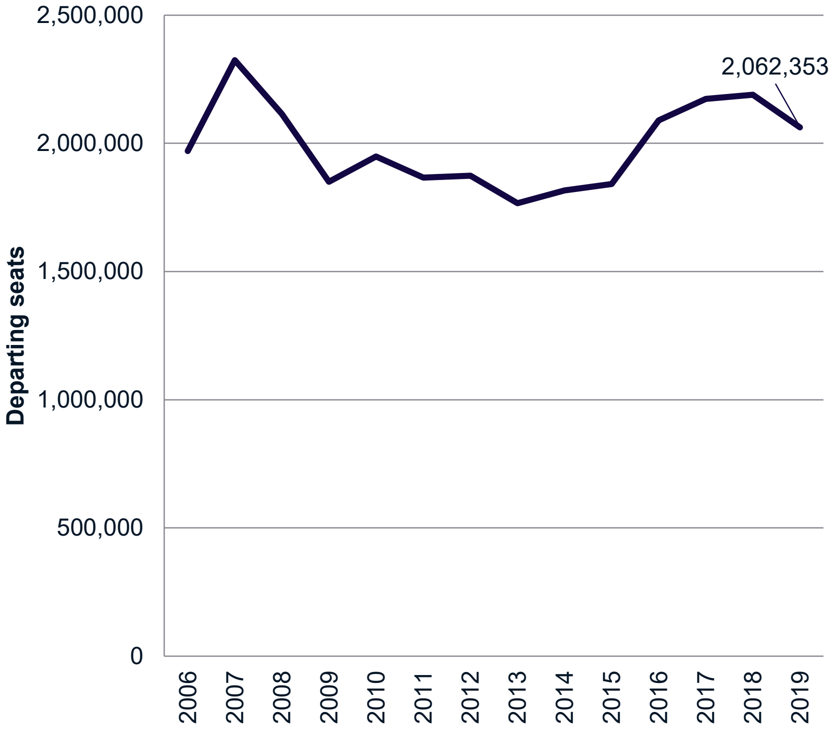
Source: International Passenger Survey by ONS

Sea and tunnel travel (000s) in 2018

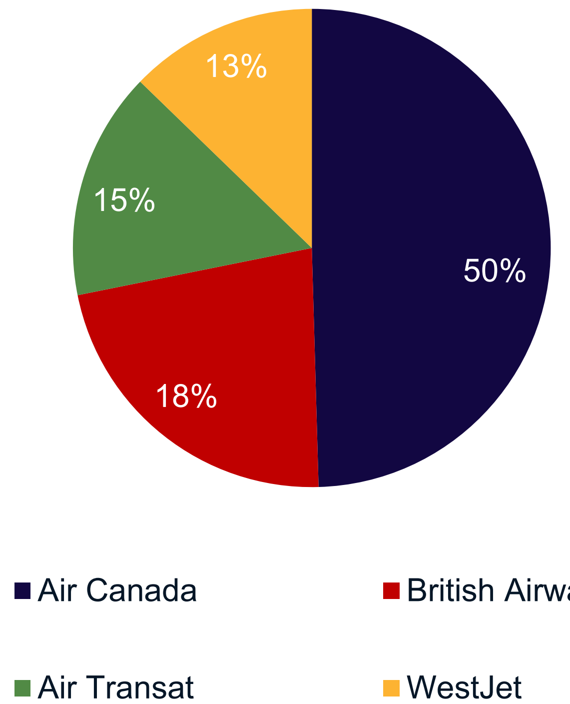


4.1 Access: capacity

Annual airline seat capacity trends



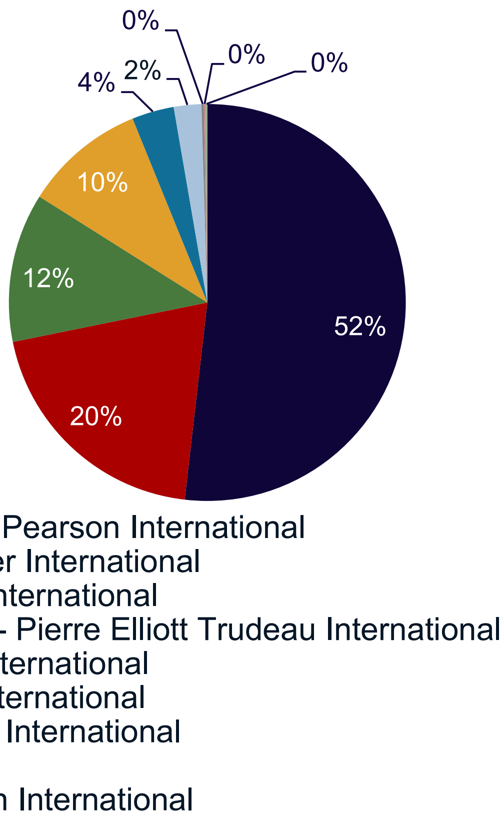
Airline seat capacity by carrier (2019)



Source: Apex 2019: non-stop flights only

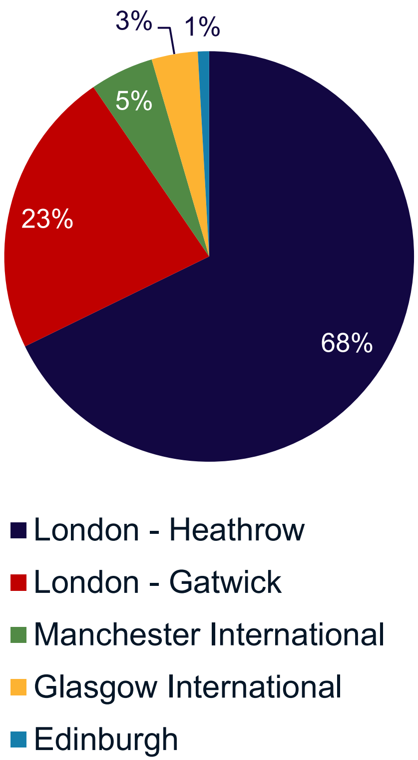
4.1 Access: capacity

Origin airport annual seat capacity (2019)



Source: Apex 2019: non-stop flights only

Destination airport seat capacity (2019)



4.2 Travel trade: general overview

The trade structure in Canada is closer to that in Britain than in the USA, with a broad trend for developments to follow those in Britain, though with a slight time lag.

The Canadian travel market is dominated by the vertically integrated main players who own the product and sell to the consumer through their own distribution channels. However, a large amount of Britain product is also sold through many niche operators. The distinction between Tour Operators and Travel Agents is becoming increasingly blurred as consumers become even more used to using the Internet to research travel information and prices.

Travel e-commerce has grown rapidly. It is increasingly evident that both airlines and travel agents are placing more emphasis on 'direct sell' as well as vertically integrated players moving into the OTA space.

The largest concentration of tour operators' head offices is in Toronto with satellite offices in both Montreal and Vancouver. There are three key Canadian airlines to Britain. Air Canada and Air Transat are both headquartered in Montreal and WestJet is based in Calgary. At present, Air Canada are in talks to purchase Air Transat with plans to maintain the two companies as separate entities. Travel agents are found across the country. TravelBrands, Transat, Air Canada Vacations, Travel Corporation and Globus Family of Brands are among the tour operators in Canada with the highest volume of travellers to the UK.

4.2 Travel trade: general overview

Independent, customisable packages were cited as the highest growth area among tour operators.

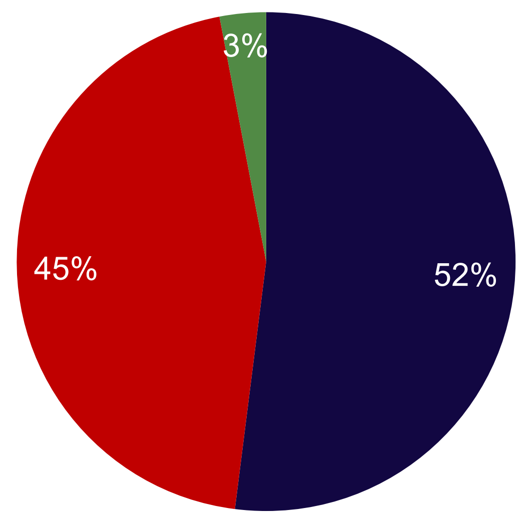
Travellers are increasingly asking for experiential vacation packages that involve authentic experiences, cultural enrichment, and in-depth discoveries, where they can meet locals and explore local culture.

Multi-generational travel continues to grow, e.g. family reunions, celebration travel, active/adventure trips.

Niche travel continues to gain popularity amongst Canadians. Growing interest for thematic group travel and experiential holidays include interest group tours like ‘set jetting’ based on film or TV locations, soft adventure tours, wellness, food & drink, and heritage-based tours.

More than half of Canadian visitors to Britain book their travel and accommodation together.

How Canadians book their holiday



Source: VisitBritain/IPSOS 2016

4.2 Travel trade: general overview

Retail Travel Agents

This category covers independent and / or home based agents, Consortia and Online Travel Agencies (OTA). Intelligence from travel partners suggests that traditional escorted tours remain strong.

Group tours are seeing a renaissance. The 'all inclusive' vacation is popular with the Canadian consumer. Agents like to book clients on an escorted tour as this usually means more commission and often less research. This is highly attractive during times of fluctuating exchange rates and also for first time travellers who seek the security of an expert guide to take them through their first experience of travelling in Britain. They are also identified as being excellent value for money as a customer knows what they are paying upfront apart from minor incidentals or souvenirs when on vacation.

Also gaining popularity are those tours featuring multi-destination products where customers can create a customised holiday from an extensive menu of components e.g. Globus Monograms.

Canadian travellers are becoming more specialised in their tastes and desires and are increasingly relying on the traditional travel agent to help fulfil these requirements.

There is a huge growth in the luxury segment for the Travel Concierge.

Retail Travel Agencies

Retail travel remains a high growth channel in the industry for all sectors, though flights, accommodations and package holidays are the most popular. In addition to online activities such as research and booking travel or travel items, there are over 5,200 travel agents in Canada comprised of a combination of bricks and mortar agencies, outside agents, home-based agents, and OTAs (Online Travel Agencies). Over the past few years it has been a growing trend to close brick and mortar offices and position agents out of their homes.

Key Canadian Travel Industry Associations

ACTA (the Association of Canadian Travel Agencies) is a membership organisation with provincial and a national office. They advocate the issues on behalf of travel agents and suppliers.

TICO (The Travel Industry Council of Ontario) is a provincial body that is responsible for administration and enforcement of the Ontario Travel Industry Act, on behalf of the Ontario government. The legislation governs all of the approximately 2,500 travel retailers and travel wholesalers registered in Ontario. Each province has their own organisation but they are taking their lead from TICO.

4.2 Travel trade: Canadian holiday calendar

National public holidays

2019	2020	National public holidays
1 January	1 January	New Year's Day
19 April	10 April	Good Friday
22 April	13 April	Easter Monday
20 May	18 May	Victoria Day
1 July	1 July	Canada Day
5 August	3 August	Civic
2 September	7 September	Labour Day
14 October	12 October	Thanksgiving Day
11 November	11 November	Remembrance Day
25 December	25 December	Christmas Day
26 December	26 December	Boxing Day

In addition to dates shown in the table on the left hand side, a number of provinces have additional public holidays.

Source: www.timeanddate.com/holidays/canada/

4.2 Travel trade: practical information

Time difference

Standard business hours are Monday to Friday, 9am-5pm local time.

Canada operates on six primary time zones; from east to west they are Newfoundland Time Zone, Atlantic Time Zone, Eastern Time, Central Time Zone, Mountain Time Zone, and the Pacific Time Zone. Eastern Time is 5 hours behind GMT.

When calling on wholesalers, quote net prices, sufficient to allow them a 20%-25% mark-up, as they will have to relinquish at least 10% to a travel agent.

The best times of the year to call are between January and April for travel agents and between April and June for wholesalers. Lead time with tour operators varies from 6 months to 2 years to see a new product come online, as some operators are more flexible as they are digital.

Transport

The Greater Toronto Area covers a huge geographic area. There is a lot of traffic congestion. Be sure to build in extra time when travelling from one side of Toronto to the other during rush hour.

Weather

The Canadian climate varies enormously. British Columbia has a moderate climate similar to Britain. The rest of Canada has more extreme seasonal differences. Temperatures range from bitterly cold winters and lots of snow to hot and humid summers. If you do visit in the winter, do not be surprised by temperatures of -15C.

Dress code tends to vary with the season in Canadian offices. Normally business attire is worn.

Anti-Spam Law in Canada

Canada's anti-spam legislation (CASL) came into effect the 1st of July 2014. Express consent must include a record of each contact agreeing to receive specific electronic messages. Requesting express consent via an e-mail message is illegal.

4.2 Travel trade: planning cycle and etiquette

Planning cycle

The planning cycle for operators depends on the size of the company and business focus. Many do have main season and off-season product, so will engage in the buying process with suppliers in spring for the following year.

Generally speaking, we suggest a minimum of 2 years lead time for an escorted operator to get new product ‘on the shelf’ and out to the consumer or travel agent.

Alternatively, FIT/independent travel product can be more flexible and allow for shorter lead time (6 months to 1 year) for integration into their existing business model. Operators will need time for planning, sourcing product, costing and pricing. Be prepared to consider offering co-operative marketing dollars to support the marketing necessary to promote this new product.

For the most part, contracting for the following year can start any time from the fall (World Travel Market) through until June.

Brochure production time is mainly September/October in order to release “Early Bird” special offers, in the fall, for promotion for the following season.

Although the planning cycle is shared here, some independent operators will develop product at various times throughout the year as many no longer publish printed brochures. This allows more flexibility with developing and promoting new offers online.

Business meeting and hospitality etiquette

It is necessary to make appointments in advance. The operator’s destination, product and sales staff often look after more than one destination. Avoid the holiday periods for your visit – many of the Canadian public holidays are different to American ones.

Canadians appreciate politeness and expect others to adhere to the proper protocol for any given situation.

French Canadian friends may greet each other by lightly kissing on the cheeks (once on the left cheek and once on the right).

Hospitality etiquette is similar to that found in Britain.

4.3 Caring for the consumer

Culture

- Canada is a culturally diverse country. Over 20% of the total Canadian population is foreign-born, which is the highest proportion among G8 countries. Canadian immigration policy was historically open, welcoming and egalitarian in its philosophy. This has also manifested into the psyche of the nation where people are encouraged to retain their cultural identities, traditions, languages and customs.
- Britain is a home away from home for many Canadian visitors, sharing a common language, culture, tradition and heritage. Being a Commonwealth country, there are very strong ties with both countries. Canadians are experienced and well-travelled international visitors.
- The Canadian population is highly concentrated geographically. The 2016 Census found that almost two thirds lived within 100 kilometres of the southern Canada-US border, an area that represents about 4% of Canada.
- Therefore, Canadians have many influences from their neighbouring country; however, they maintain a fiercely independent culture and mentality. Canadians do not like to be referred to as American or even North American.

Accommodation

- Canadians are used to a high standard of living and good quality of service. If something is wrong, they will be polite when they complain. However, they will expect an immediate remedy to the situation. Canadians are used to space and would expect this in hotel rooms. Single bed rooms are few and far between in Canada, so it’s important to use clear language when discussing room features and details.
- As many Canadians arrive in Britain on overnight flights, the possibility of early check-in at their accommodation is always appreciated. If you are their first port of call from the airport, try and arrange for some form of hospitality and services when they arrive, especially if their accommodation is not ready. This mainly applies to business visitors and those on upscale FIT trips.

Source: CIA Worldfactbook 2019, www.canadianimmigrant.ca, Canada Statistics

4.3 Caring for the Consumer

Food and drink

- 52% of Canadian visitors to the UK were extremely satisfied with their food and drink, which is above average for all visitors to the UK. Another 38% were satisfied.
- 27% of Canadians that consider visiting Britain on holiday in the future say that 'sampling the local food and drink' is a reason or motivator for visiting.
- Canadians are very familiar with the emergence of British celebrity chefs, as many of the shows are televised in Canada.
- Canada is one of the largest producers of beer and has many award-winning wines. When travelling to Britain, some Canadians may seek out the stereotypical British pub and beer, while others may look for Indian food and gourmet food.
- Meal times are similar to those in Britain.
- Canadians are very comfortable paying for goods and services with a credit card.
- Canada has a tipping culture when it comes to service, and tipping between 15-20% of the food total bill is standard.

Language

- Both English and French are official languages in Canada. English is the first language for 59% of Canadians and French is the main language for 22%.

Source: International Passenger Survey by ONS, VisitBritain/IPSOS 2016, CIA World Factbook 2019

Appendix

Useful links and further information

Appendix 1: Working with VisitBritain

We can help you extend your reach through:

Digital and social media such as through Twitter, our Facebook page – Love GREAT Britain, or Pinterest

Press and PR by sending us your newsworthy stories or partnering to host journalists, influencers, and broadcast shoots

Leisure, and the business travel trade via our programme of sales missions, workshops and exhibitions or promotion to our qualified Britagents and supplier directory

Retailing your product through the VisitBritain shop

Joining the Tourism Exchange GB platform–giving you access to a wide range of international customers, via connected distributors. Connection to the platform is free.

Or as a major campaign partner

We are here to support you and look forward to working with you. To find out more browse our:

Opportunity search

or trade website
or contact the B2B events team
or campaign partnerships team
or trade support team
or VisitBritain shop team

Appendix 1: Working with VisitBritain

VisitBritain's strategy to grow tourism to 2025

Developing world-class English tourism product: VisitBritain has collaborated with VisitEngland to develop and deliver the **Discover England Fund** since November 2015

Collaborating globally: VisitBritain's network extends in four regions: Europe, the Americas, APMEA and North East Asia. Meet those teams and their trade partners at VisitBritain's different trade events, VIBE, ExploreGB, or Destination Britain events in market.

Inspiring the world to explore Britain as a **GREAT Britain** campaign partner and through our **'I Travel For…'** marketing campaign.

Acting as trusted partner and advisor to the industry, but also our Government and Public Diplomacy partners by generating and offering them world-class market insights.

VisitBritain also develops and promotes products for Business Events, food & drinks, rail, luxury, regional gateways, and the Discover England Fund

To find out more information, browse:

VisitBritain's mission

The Government's Tourism Action Plan

VisitBritain's events

'I Travel For…' campaign

The tourism sector deal bid

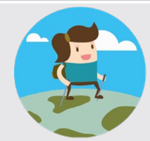
Appendix 1: Working with VisitBritain

VisitBritain's global audience segments

In 2017, VisitBritain carried out a research project across all its main inbound target markets to define global audience segments and identify best opportunities in each of those international travellers' market. On the right is a summary of VisitBritain's 5 global audience segments. To learn more visit: https://www.visitbritain.org/understanding-our-customers

In Canada, VisitBritain focuses on three audience segments among the international travellers:

- **Buzzseekers:** Trendsetters seeking out new experiences and always looking for action and excitement
- **Explorers:** Like to go places that are off the beaten track as well as visit top attractions at a relaxed pace

	Segments (& global attributes)	**Global market share**	**Market share in Canada**
	**Buzzseekers** (free spirited and spontaneous, they like holidays full of action and excitement)	38%	24%
	**Explorers** (they enjoy outdoors, must-see sites, and embracing local cultures at a more relaxed pace)	23%	23%
	**Adventurers** (they live to go off the beaten track, spending time outdoors and trying out new experiences)	16%	18%
	**Sightseers** (they prefer staying within comfort zone, preferring cities to countryside, planning in advance)	12%	17%
	**Culture Buffs** (image and brand conscious, travel is seen as a status symbol; they like well-known, safe destinations)	12%	18%

Source: VisitBritain/Kubi Kalloo, 2017

Appendix 2: Useful research resources

We have dedicated research and insights available which include:

- Latest monthly and quarterly data from the International Passenger Survey by ONS as well as by area of the UK
- Inbound Tourism Trends by Market
- Inbound activity data
- Sector-specific research
- 2020 Inbound Tourism Forecast
- Britain's competitiveness

We are here to support you and look forward to working with you.

To find out more about Brazil or other inbound markets browse

our markets & segments pages or

our inbound research & insights or

contact us directly
(Email: research@visitbritain.org)

Appendix 2: Useful market-specific research resources

We have dedicated market specific research and insights available which include:

- Planning, decision-making and booking cycle of international leisure visitors to Britain
- Technology and social media
- Gateways in England, insights on overseas visitors to England's regions, participation in leisure activities, multi-destination trips and more
- Food & drink research

We are here to support you and look forward to working with you.

To find out more about Canada or other inbound markets browse our markets & segments pages.

Or our inbound research & insights.

Or contact us directly.

Appendix 3: Definitions, sources and information on this report

How to read the information in this market profile

Details on main sources

The **International Passenger Survey** (IPS) is a UK-wide departure survey, carried out by the Office for National Statistics (ONS). All data are based on data collected as visitors are about to leave the UK about what they did, not on their intentions or perceptions. Except when specified, IPS refers to people according to their country of residence, not nationality. Where we talk about mode of transport, it refers to what is used on departure to leave the UK, with the presumption that shares are similar on arrival. You can find out more and consult the release calendar, on our IPS webpage.

Oxford Economics last updated the 'Global Travel Service' databank on 8th November 2019.

Apex was last updated with December 2019 data.

UNWTO data are based on their latest Tourism Barometer and Statistical Annex, November 2019.

VisitBritain/IPSOS 2016 refers to the 'Decisions & Influences' research project carried out in Australia, Brazil, Canada, China, Denmark, France, GCC (UAE and Saudi Arabia), Germany, India, Italy, Japan, Netherlands, New Zealand, Norway, Russia, South Korea, Spain, Sweden, and USA. Its all-market averages are based on weighted average of those markets. Only international travellers participated, half of each market sample having travelled to Britain before.

The **Anholt Nation Brands Index** (NBI), now powered by Ipsos, was carried out online in July 2018 in Argentina, Australia, Brazil, Canada, China, Egypt, France, Germany, India, Italy, Japan, Mexico, Poland, Russia, South Africa, South Korea, Sweden, Turkey, UK and USA. Its all-market averages are based on those markets. It is based on nation-wide representative samples.

Appendix 3: Definitions, sources and information on this report

How to read the information in this market profile

Useful definitions and abbreviations

VFR means Visiting Friends and/or Relatives.

Misc journey purpose means Miscellaneous – other journey purposes.

In IPS, to be defined as a **package**, a holiday must be sold at an inclusive price covering both fares to and from the UK and the cost of at least some accommodation. Neither the respondent nor the travel agent from whom the package was bought will know how much of the inclusive price is accounted for by fares or by accommodation.

High Net Worth Individuals, or HNWIs, are people with liquid assets valued over USD1million.

Other useful information

Top 10 activities in Britain is based on propensity for visitors to have undertaken activities whilst in Britain, data having been collected between 2007 and 2017. Where an activity was asked about more than once, only the most recent answers were taken into account.

Repeat visits are visits made by people who had already visited the UK before; British expats have been excluded for better representation of the market's propensity to visit Britain repeatedly. IPS question asked in 2015.

Likelihood to recommend Britain as a destination is based on holiday visits, of at least one night, excluding British expats.

Market and Trade Profile: Canada

January 2020