Canadian Tourism Commission

Commission canadienne du tourisme

Global Tourism Watch

2014 UK Summary Report

Canada

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1. Introduction

The Canadian Tourism Commission (CTC) began conducting the annual Global Tourism Watch (GTW) program in 2007. The primary purpose of this research program is to expand the base of consumer-based intelligence in twelve core markets around the world[1].

The overall objectives of the GTW study are to:

1. Monitor awareness, travel intentions, and other key market indicators for Canada and the regions;
2. Assess perceptions of Canada and track brand performance against the competitive set over time;
3. Identify the general experiences sought by travellers, assess Canada's competitive positioning on key products and identify growth opportunities;
4. Identify motivators and barriers for travel to Canada; and,
5. Explore the role of social media and advocacy in the tourism context.

In response to a rapidly changing travel marketplace, the CTC and TNS worked together to substantially revise and update the questionnaire prior to the 2014 fieldwork. This was done to better reflect current travel realities and to gather more in-depth information on Canada's competitors in each market. The new GTW data permits direct comparison of Canada to those competitor countries unique to each market. The CTC has designated the US, Thailand, India, South Africa, Australia, and New Zealand as the competitive set for Canada in the UK market, for 2014[2].

Methodology

In 2014, a web-based panel survey was conducted by TNS. The target population for the online survey was residents aged eighteen years and older, who had taken a long-haul pleasure trip outside of Europe, North Africa, and the Mediterranean where they had stayed at least four nights with a minimum of one night in paid accommodation in the past three years, or plan to take such a trip in the next two years.

Data was gathered from 1,499 respondents in the UK, including 299 recent visitors to Canada, in October 2014.

[1] Identified by the CTC as the international 'long-haul' markets of: Australia, Brazil, China, the UK, Germany, France, India, Japan, Mexico and South Korea, as well as the US and the domestic Canadian market.
[2] The competitive set for the UK in 2014 remains unchanged from that of 2012. The CTC continuously reviews the competitive set for each market, and from time to time, may update it to better reflect the current realities in the marketplace.

2. Strategic Considerations

The key strategic considerations for Canada, arising from the 2014 results of UK long-haul travellers, can be summarised as follows:

1. As the UK economy continues to rebound from the financial crisis, the outlook for long-haul travel from the UK is improving and consideration for Canada as a long-haul vacation destination has grown steadily. With the British Pound (£) gaining significant ground relative to the Canadian dollar in recent years, Canada has become a more affordable destination for UK travellers. At the same time, the British Pound (£) lost ground relative to the US dollar, making the US, Canada's main competitor, more expensive than before for British travellers. As a result, Canada is well-placed to capture its fair share of any increase in long-haul travel from the UK.

2. However, Canada needs to persuade UK travellers that it offers *value* and the *range of experiences* they are looking for in a vacation, especially when compared to the US. Given the fact that the main barrier to visiting Canada is the *cost*, they need to be assured that Canada still offers *value for money*.

3. Despite the fact that the long-haul travel market in the UK continues to pick-up, the substitution effect which has benefitted European destinations and *staycations* remains. Travellers need a compelling offer to reverse this trend and choose long-haul vacations once again over shorter city-breaks closer to home and domestic options.

4. While Canada is well-recognised for its outstanding natural beauty, marketing efforts need to promote the *range* of experiences available, and make them accessible, potentially through vacation packages which include a number of destinations and / or experiences. There is a danger that Canada's offer could be perceived as one-dimensional.

5. When it comes to city and cultural experiences, there is a great deal of ground to be made up on the US and Australia. UK travellers do not see Canada as being unique and differentiated in terms of its offer, or offering the experiences they are seeking – as a result, they may not be *willing to pay a little more* to get here.

6. The most influential and trusted source of information and advice on where to go for a vacation continues to be *friends and family*, whether in-person, or increasingly, through social media. Advocacy among those who have visited, or are currently visiting Canada, is a key marketing opportunity, especially when encouraging them to share photos.

7. Visitors to Canada still skew towards the older demographic, but there is evidence that the greatest interest in visiting in the future is among the 18 to 54 year-old group, particularly those with children[3]. They are still *more likely* to have relatives here (35%), but two-thirds (65%) do not have a pre-existing connection to Canada. Attracting the younger traveller to Canada is key to driving visitation going forward, but Canada's biggest advocates are UK travellers over the age of fifty-five.

[3] Thirty-four percent of those UK travellers 'interested in Canada' have children, compared to the average for all UK long-haul travellers of 29%.

3. Key Observations

The following section summarises the key points of interest from the 2014 survey of UK long-haul travellers.

Key findings:

- Prospects for the UK economy are improving, and with it, there is increased optimism around future travel intentions, which will hopefully signal the reverse of a downward trend caused by the economic crisis. The Market Outlook indicator for UK long-haul travellers has jumped considerably since 2012, to +27 (up from +17). A third (36%) of UK travellers believe they will *spend a little more* on *leisure travel outside of the UK* in the next twelve months; a similar number (33%) believe they will take more long-haul trips in the next two to three years.

- There are also encouraging signs for travel to Canada. While awareness of Canada as a potential destination for a long-haul vacation remains relatively flat[4], there was a significant increase in the number of travellers who said they were *interested* in visiting Canada (84%), as well as the number who said they were *likely* to take a trip to Canada in the next two years (35%). This increased interest in Canada occurred as the British Pound (£) gained significant ground relative to the Canadian dollar over the past two years or so, hence making travelling to Canada for affordable for UK travellers. In order to realise this potential growth and reverse the trend seen in previous years, Canada needs to ensure it is well-placed to convert these good intentions to actual visitation, as interest has also increased for other long-haul competitors[5].

- Canada faces stiff competition from the US, New Zealand and Australia over perceptions around *value*[6]. On all four *value* attributes Canada lags behind these three, some way off the top-ranked destination. Most notably, there is a widening gap (between Canada and the top-placed destination) when travellers consider whether these potential destinations are: *a place with unique features that other destinations don't offer, a destination with the travel experiences I am specifically looking for* and *a destination I would pay a little more for*. The US has made significant gains over Canada since 2012 and is now the highest-ranked long-haul destination for *a place with unique features* and *a destination with the travel experiences I am looking for*. The concern from Canada's perspective is that the US also tops all three price attributes and leads Canada by a considerable margin, suggesting it is seen to be more *affordable*.

[4] Up slightly from 11% in 2012 to 13% in 2014 – but in line with the trend in consideration for other long-haul destinations, which means Canada remains 3rd on their consideration set, behind the US and Australia.
[5] The growth in interest in Canada, compared to 2012, was actually higher when compared to the US, Australia and New Zealand (+5 percentage points). Australia was +1%, US +2% and New Zealand +3% points.
[6] As defined by the CTC, that is: *a place with unique features that other destinations don't offer, a dream destination that I would visit if money were no object, a destination with the travel experiences I am specifically looking for* and *a destination I would pay a little more for*.

- Among those travellers who would consider taking a trip to Canada, the biggest barrier to them committing to booking a trip here is *cost* – one-in-four (26%)[7] say it is *too expensive*. Those travellers might consider a short-haul European or North African vacation a more affordable option, or as we have seen increasingly in this market, a domestic holiday or *staycation*. In considering the barriers for visitation, the alternatives will include taking a short-haul vacation, or no vacation at all. While Canada is seen as relatively more affordable than both New Zealand and Australia, there is certainly a perception that the US is not only a lower-cost option, but also provides greater *value for money*[8]. The focus must once again be on improving the perceived *value* of a vacation to Canada, sufficient to justify the incremental cost over much closer European destinations and domestic alternatives.

- The importance of *advocacy* cannot be underestimated. Whether in-person, or increasingly through social media and online channels, it is by far the biggest influence on where travellers decide to take a vacation. Trusted sources are far more effective than traditional advertising in driving *consideration*, though it may have a role in terms of *awareness*, and therefore affecting the early stages of the path-to-purchase. Travel agents still have an important role to play in guiding the potential long-haul traveller, as do travel guide books – over a third of UK travellers (37%) used a travel agent to book their flights. Nevertheless, the general trend indicates that the role of travel agents has been declining steadily over the past decade or so.

- In terms of advocacy, Canada still lags behind New Zealand and the US (as measured by the Net Promoter Score), but not by far. Of some concern is the fact that the NPS score fell from +50 in 2012 to +41 in 2014. And while NPS scores were generally down across Canada's long-haul competitive markets, the net result was a fall from second-spot, behind New Zealand, to fourth-spot, below the US and Australia. That said, it is still worth remembering that the majority of visitors to Canada (58%) would recommend a trip to Canada to a friend or family member. However, it may be worth trying to determine why one-in-four (25%) were reluctant to recommend (passives) and almost one-in-five (17%), would definitely not (detractors).

- A third (34%) of recent visitors to Canada (past three years) travelled here primarily to visit friends or family – significantly higher than the average for international long-haul travel (21%). The significance of family-ties is further exemplified by the fact that more than half of recent visitors to Canada (57%) have relatives living here. These connections present an opportunity to promote Canada through advocacy, and also provide a core of visitors who are less susceptible to economic circumstance, changing patterns and preferences for vacation experiences and marketing efforts from competing destinations. That said, Canada's offer has to be able to compete against the competition on its own merits, and appeal to those who do not already have a good reason to make the trip across the Atlantic.

- Canada is widely recognised as offering outstanding natural beauty and outdoor experiences – it is also by far the main reason those considering a trip here are excited about coming. This puts Canada in a strong position because in terms of product interests, *seeing beautiful scenery* tops the list among almost all of Canada's long-haul markets. In

[7] Excluding those who said 'there were not reasons not to visit Canada in the next two years', the figure is 41%.
[8] Based on the relative scores for 'A place that offers good value for money'.

terms of brand perceptions, only Australia and New Zealand can compete on attributes associated with the natural geography. Canada's efforts to promote this asset has clearly been successful and is a testament to the success of past marketing campaigns.

4. Market Health and Outlook

The following section is an overview of the UK economy and tourism market, based on key economic indicators and a review of secondary research conducted on UK travel trends[9].

Background

The UK economy

The UK economy grew by 2.6% in 2014, a significant increase over the 1.3% growth achieved in 2013 (Office for National Statistics, 2015). The third quarter of 2014 was the seventh successive quarter of output growth and the longest sustained run of quarterly growth since the onset of the economic downturn in 2008 (Office for National Statistics, 2015).

The projected UK slowdown reflects the drag on exports from the ongoing malaise in the Eurozone and expected intensification of the fiscal squeeze in the run-up to the general election in May 2015. The uncertainty over the outcome of the election could potentially dampen business investment in the short-term (Price Waterhouse Cooper, 2015). However, the UK remains on course to be the fifth-largest economy in the world by 2017 (currently the sixth-largest in the world and third-largest in Europe).

Inflation is forecasted to remain below the 2% target rate for 2015 while unemployment is set to fall steadily throughout the year, returning to pre-recessionary rates of around 5% by the end of this year, despite a moderate forecasted increase in interest rates (Price Waterhouse Cooper, 2015).

Consumer confidence and Outbound Travel Outlook

Despite the encouraging economic forecasts, the UK Consumer Confidence Index (UKCCI)[10] ended the year (2014) at -4.0, and is forecast to fall throughout the first quarter of 2015 (Trading Economics, 2015).

Encouragingly, however, the outlook for travel in 2015 is cautiously optimistic, with 20% of UK consumers anticipating spending more on holidays (than in 2014), and 15% saying they will spend less (Association of British Travel Agents, 2015).

This optimism is backed-up by a survey conducted by Barclaycard which found that one-in-four (25%) UK consumers said they would be spending more on holiday costs in 2015 (Barclaycard, 2014).

[9] Sources are cited at the end of the reports (see Sources).
[10] The consumer confidence survey measures the level of optimism that consumers have about the performance of the economy in the next 12 months. The GfK Consumer Confidence is derived from the survey of about 2,000 consumers which are asked to rate the relative level of past and future economic conditions including personal financial situation, climate for major purchases, overall economic situation and savings level.

Travel trends

- A 2013 study, conducted in the UK by TNS[11], revealed that despite the economic downturn, there was no evidence of a significant decline in the proportion of the British population taking a holiday. However, there has been a notable shift in the number of domestic holidays being taken *within* the UK – the *staycation effect*[12] (TNS UK, 2013).
- Between 2008 and 2009 there was a major change in the holiday plans of UK residents, with a 16% fall in visits abroad according to the International Passenger Survey (IPS). At the same time the Great Britain Tourism Survey[13] reported a 17% increase in holiday visits to destinations in Great Britain (TNS UK, 2012). These figures widened the gap between domestic and international travel (Office for National Statistics, 2013). Forecasts for 2015 suggest that almost one-in-three (32%) UK consumers plan to spend their 'main' holiday within the UK (Travel Supermarket, 2015).
- Fewer British travellers are opting for long-haul destinations, and, with the relative strength of the Pound (£) against the Euro (€) in the preceding twelve months, European destinations are once again becoming the more-attractive option for holidays and short-breaks. There is also increasing preference for *all-inclusive* deals within the market for *package holidays*, especially where children form part of the travel party (TNS UK, 2013).
- The UK travel association ABTA[14] predicted that 2014 would continue to see a trend in the popularity of package holidays as consumers increasingly look for *value*. This is also, in part, due to the greater choice and sophistication on offer, in addition to tailor-made tours and bespoke itineraries. All-inclusive packages were also expected to continue to benefit from this trend (Association of British Travel Agents, 2014).
- In 2014, *city breaks* overtook *beach holidays* as the most popular type of holiday and are expected to remain top in 2015, with 43% planning a city break and 42% planning a beach holiday (Association of British Travel Agents, 2015). The dominance of short-haul city-breaks is likely due to the increase in low-cost flight options and the variety of destinations, along with the strength of the Pound (£) against the Euro (€) (Association of British Travel Agents, 2015).
- The report also identifies a key trend for 2015 being the '*hard-working holiday*', characterised by holidaymakers combining elements such as events, shows or experiences with their holiday, as well as multi-centre holidays; challenge holidays and activity holidays – all of which include the added benefit of coming home with a new skill (Association of British Travel Agents, 2015).
- ABTA's market outlook for 2015 predicts that the most popular long-haul destinations for UK travellers will continue to include the US, Australia, New Zealand, Mexico, Canada and Thailand (Association of British Travel Agents, 2015). Luxury trips and all-inclusive holidays

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[11] The TNS Holiday Attitudes Report 2013 consisted of interviews with 2,085 UK respondents, and was conducted online.
[12] A *staycation* is a period in which an individual or family stays home and participates in leisure activities within driving distance, sleeping in their own beds at night. They might make day trips to local tourist sites, swimming venues, or engage in fun activities such as horseback riding, paintball, hiking or visiting museums. Most of the time it involves dining out more frequently than usual.
[13] The Great Britain Tourism Survey is a continuous tracking survey conducted over-the-phone by TNS UK, with 2,000 interviews with GB residents, per week.
[14] Association of British Travel Agents

are tipped to be the fastest-growing sectors in the coming year[15], but there is also an increasing appetite for adventure holidays. (Travel Supermarket, 2015).

[15] A 36% increase in the number of UK consumers who are planning to treat themselves to a 'luxury trip' this year, and a 31% increase in the number planning for an 'all-inclusive' vacation.

5. Market Potential

Exhibit 5-1 provides an estimate of the size of the potential market for Canada in two ways – the macro target market and the immediate potential. Exhibit 5-2 shows the estimate of the potential market size by province and region.

The target market is a broader estimate of the market size based on expressed interest among all UK long-haul travellers (market size estimate derived from the 2010 omnibus study of the UK adult population). The proportion of GTW respondents who are “definitely”, “very”, or “somewhat” interested in Canada in the next two years is applied to the broader traveller population to come up with a target market estimate of 17.5 million.

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. This translates into a market of 7.3 million travellers with more immediate potential for conversion.

Exhibit 5-1 Size of the potential market to Canada (next two years)

Measure	Size of Potential Market to Canada
Total potential long-haul pleasure travellers (aged 18 plus)	20,873,000
Target market for Canada:	
Definitely / very / somewhat interested in visiting Canada in the next two years	84%
Size of the target market	17,533,000
Immediate potential for Canada:	
Will definitely / very likely visit Canada in the next two years[16]	35%
Immediate potential	7,306,000

Base: Long-haul pleasure travellers (n = 1,499)
Q5: How interested are you in taking a trip to Canada in the next two years?
Q14 / 15: Realistically, how likely are you to take a holiday trip of four or more nights to Canada in the next two years? And, how likely are you to take a holiday trip of one to three nights to Canada in the next two years? Please include trips to other countries (e.g., the United States) that would involve a stay of one to three nights in Canada.

[16] Includes respondents likely to visit Canada for a trip of one to three nights, or a trip of four nights or more.

Exhibit 5-2 Market Potential for Each of the Regions

Measure	BC	ON	QC	AB	ATL	YK	SK	NWT	MB	NU
Immediate potential for Canada	7,306,000									
Likely to visit region	74%	66%	38%	38%	27%	10%	10%	9%	7%	4%
Immediate potential for the regions (000s)	5,406	4,822	2,776	2,776	1,973	731	731	658	511	292

Base: Those likely to visit Canada on a trip of one to three nights, or four or more nights, in the next two years (n = 543)
Q16: If you were to take a holiday trip to Canada in the next two years, which of the following Canadian travel destinations are you likely to visit?

6. Competitive Environment

The GTW tracks key performance indicators (KPIs) for Canada in areas such as aided destination awareness, unaided and aided destination consideration, and market penetration. Exhibit 6-1 summarises the 2014 KPIs for Canada[17].

More than one-in-three (35%) UK residents rated their knowledge of travel opportunities in Canada as either *excellent* or *very good*, compared to 33% in 2012 – the highest level of aided awareness since the survey was first conducted in 2007. Among Canada's defined competitive set for the UK long-haul market[18], only Australia (36%) and the US (53%) scored higher. Self-rated knowledge was significantly higher among UK long-haul travellers aged between 18 and 34 years of age and those with higher household incomes.

Canada is second only to the US in terms of past visitation (ever visited), with 27% market penetration among UK long-haul travellers[19], a slight fall compared to 2012 (29%), but still ahead of Australia (23%). Almost two-thirds (63%) of UK travellers have visited the US in the past three years.

Unaided consideration for Canada[20] improved from 11% in 2012 to 13%, reversing the downward trend seen since the peak of 2010 (16%). Again, only the US and Australia were mentioned more often when asked *which destinations they were seriously considering* taking a trip to the next two years.

When asked specifically about long-haul travel intentions in the next two years[21], Canada was in fact second only to the US (ahead of Australia) and the gap between Canada and Australia actually increased over 2012. Also, encouragingly, Canada is ahead of Australia in terms of the number who are *definitely interested*.

Interest in visiting Canada (aided) is significantly higher among travellers who have friends or family residing in Canada, those who have visited Canada already in the past three years and families with children. Again, there is a slight skew towards travellers less than thirty-five years old and those with higher household incomes.

The number of UK travellers who said they were *likely to visit Canada in the next two years* also increased to over a third (35%), up from 30% in 2012[22]. Those most likely to visit were again likely to be the younger travellers (18 to 34 years); families with children, with higher household incomes or those with friends or family already living in Canada.

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[17] Unaided destination awareness was dropped from the 2014 survey.
[18] For the UK, the long-haul competitive set of countries is defined as the US, Australia, New Zealand, Thailand, South Africa and India.
[19] Includes those that have taken a long-haul trip in the past three years, and those who have not, but intend to do so in the next two years.
[20] Respondents are not shown a list of destinations, but are asked to mention any destinations which *come to mind* when thinking of their vacation plans *in the next two years*.
[21] Percentage of respondents who are definitely interested, very interested or somewhat interested in visiting each of the countries presented to them (seven in total), in the *next two years*.
[22] Results not comparable years prior to 2012 due to a change in the questionnaire text.

Exhibit 6-1 Key Performance Indicators (KPIs) for Canada – Summary

Key Performance Indicator	Definition	All Long-Haul Travellers n = 1,499	Recent Visitors to Canada[23] n = 299	Interested in Canada[24] n = 422
Destination awareness:				
Aided awareness of travel opportunities in Canada	% with excellent / very good knowledge of travel opportunities in Canada	35%	67%	66%
Past visitation:				
Overall market penetration	% who have ever visited Canada for pleasure	27%	100%	37%
Intentions:				
Unaided destination consideration	% who mentioned Canada or a destination in Canada on their consideration list	13%	36%	31%
Competitive positioning on unaided destination consideration	Rank on the consideration list relative to competitors	3rd	1st	2nd

Base: Long-haul pleasure travellers (n = 1,499), Recent visitors to Canada (n = 299) and those interested in visiting Canada (n = 422)
Aided awareness (Q4) – "How would you rate your level of knowledge of vacation opportunities in each of the following destinations?" (Aided list of Canada plus six pre-defined long-haul competitors).
Market penetration (ever visited) (Q11b) – "Which of the following countries have you ever visited while on a vacation trip?" (Aided list of long-haul destinations).
Unaided destination consideration (Q2) – "Which destinations are you seriously considering for your trips in the next two years?" (Open-ended, coded responses).

The outlook for inbound tourism from the UK is therefore extremely encouraging, based on these key indicators of awareness, consideration and interest. On a slightly cautionary note, Canada's major competitors in this market: Australia, New Zealand and the US, have also witnessed an upward trend in destination interest, but it is fair to say that the US and Canada have seen the most gains since 2010[25].

Outside of domestic, European and North African vacation options, Canada remains in the UK travellers' top-four long-haul destinations under consideration, while Thailand, South Africa and India fall some considerable way behind.

[23] Visited Canada in the past three years for a pleasure trip of four or more nights with one or more nights in paid accommodations.
[24] Definitely interested in visiting Canada in the next two years.
[25] Since 2010, aided destination interest i.e., *those somewhat interested, very interested* or *definitely interested* in visiting in the next two years, increased for the US (+10% points), Canada (+12%), Australia (+7%) and New Zealand (+6%).

7. Perceptions of Canada

To be successful, a destination must be perceived as offering value, relevant experiences, and unique tourism products to travellers. To assess brand, value, and price perceptions, respondents were asked to evaluate Canada relative to competing destinations on a number of attributes.

Brand perceptions

Exhibit 7-1 shows Canada's competitive position based on UK travellers' perceptions around a number of brand-related attributes, whether they had been to Canada or not[26]. Based on the results for these seven *brand* attributes, Canada faces stiff competition from Australia, New Zealand and the US.

In terms of *exploring the geography*, there is little to discern between Canada, New Zealand and Australia, all of which place some way ahead of the US – there is clearly recognition that Canada can also offer outstanding natural beauty, although Canada's score fell slightly compared to 2012[27].

Where Canada tends to lag behind both New Zealand and Australia are on those attributes focused on culture: *a place that inspires me to explore its culture*[*] and *a place that inspires me to meet and engage with its people*.

For *authentic experiences*, impressions of Canada are more closely-aligned to those of the US, with New Zealand having a significant advantage. The US has seen a significant improvement in this score over 2012, increasing from 41% to 53% in 2014, while Canada's remained relatively unchanged.

The US also has a clear advantage when it comes to *exploring its cities*[*], a new attribute (*) added for 2014, recognising the high level of interest travellers have in exploring city attractions[28].

In terms of *sampling local flavour and cuisine*[*], there is very little to distinguish between the seven destinations presented. Although as a vacation activity it remains very popular, there is little to differentiate the competitive set in terms of their ability to inspire them to explore local flavours.

Overall, Canada average a score of 7.4 (out of ten) across all *brand* attributes, which can be directly compared to those scores for Canada's key competitors: US (7.2), Australia (7.4) and New Zealand (7.6) – the highest average score in this competitive set of destinations. These scores are not directly comparable to the study conducted in 2012, as four new attributes were added for 2014.

[26] The base consists of all long-haul travellers, regardless of whether they have been to Canada or not, and is based on their *perceptions* of what Canada has to offer, regardless of their familiarity with Canada's offer.
[27] In 2012, Canada (66%) placed ahead of Australia (63%), second only to New Zealand (69%).
[28] *City activities* was consistently one of the top-five *product interests* for long-haul travellers in all markets, when asked in previous years.

Exhibit 7-1 Brand perceptions

Brand Perceptions	1#	2#	3#	4#	5#	6#	7#
A place that inspires me to explore its geography	NZ 65%	AUS 64%	CAN 63%	USA 60%	SAF 43%	THA 40%	IND 39%
A place that offers an authentic experience	NZ 59%	AUS 56%	CAN 54%	USA 53%	IND 50%	THA 48%	SAF 42%
A place that inspires me to explore its cities*	USA 60%	AUS 53%	CAN 52%	NZ 45%	IND 38%	THA 35%	SAF 31%
A place that inspires me to explore its culture*	NZ 53%	AUS 52%	CAN 46%	IND 45%	USA 43%	THA 42%	SAF 36%
A place where I can create extraordinary personal travel experiences*	AUS 58%	NZ 57%	USA 56%	CAN 54%	IND 42%	THA 42%	SAF 40%
A place that inspires me to meet and engage with its people	NZ 55%	AUS 51%	USA 50%	CAN 49%	THA 37%	IND 37%	SAF 32%
A place that inspires me to sample local flavour and cuisine*	NZ 48%	USA 48%	AUS 47%	CAN 46%	THA 46%	IND 44%	SAF 37%

Base: Long-haul pleasure travellers (n = 1,499)
Q11: We are interested in your general impressions on [country] as a holiday destination, even if you have never been there. On a scale of 1 to 10, where 1 is 'strongly disagree' and 10 is 'strongly agree', how would you rate [country] on each of the following?
Note: Scores shown are the 'top-three-box scores' i.e., the percentage of respondents who provided the destination with a rating of 8, 9 or 10, on a 1 to 10 scale of agreement with each statement.
***Note: New attribute added for the 2014 survey.**

Value perceptions

Exhibit 7-2 reveals that Canada's position in the competitive set drops to fourth when UK travellers are asked about their perceptions around *value*.

Compared to the US, Australia and New Zealand, Canada is less likely to be perceived as a *place with unique features that other destinations don't offer*, or *a destination with the travel experiences I am specifically looking for*.

As a result, when compared to those same destinations, travellers are reluctant to agree that Canada is a place *I would pay a little more for*, and if 'money were no object', UK travellers were less inclined to agree that Canada would be a *dream destination I would visit*.

Canada's average rating across all *value* attributes remained relatively unchanged in 2014 (7.1), but the notable shift has been the significant improvement in the scores for the US – which now places above all other destinations in this competitive set, as shown in Exhibit 7-3.

Exhibit 7-2 Value perceptions

Value perceptions	1#	2#	3#	4#	5#	6#	7#
A place with unique features that other destinations don't offer	USA 61%	NZ 57%	AUS 56%	CAN 53%	IND 50%	SAF 45%	THA 44%
A dream destination that I would visit if money were no object	NZ 57%	USA 57%	AUS 56%	CAN 53%	THA 37%	SAF 35%	IND 32%
A destination with the travel experiences I am specifically looking for	USA 59%	NZ 51%	AUS 50%	CAN 48%	THA 32%	SAF 30%	IND 29%
A destination I would pay a little more for	AUS 50%	USA 48%	NZ 48%	CAN 44%	THA 29%	SAF 28%	IND 27%

Base: Long-haul pleasure travellers (n = 1,499)
Q11: We are interested in your general impressions on [country] as a holiday destination, even if you have never been there. On a scale of 1 to 10, where 1 is 'strongly disagree' and 10 is 'strongly agree', how would you rate [country] on each of the following?
Note: Scores shown are the 'top-three-box scores' i.e., the percentage of respondents who provided the destination with a rating of 8, 9 or 10, on a 1 to 10 scale of agreement with each statement.

Exhibit 7-3 Year-on-year change in average rating for *value* attributes

Value	2012	2014	YOY change
US	6.9	7.4	+0.5
New Zealand	7.4	7.3	-0.1
Australia	7.2	7.2	-
Canada	7.2	7.1	-0.1

Base Long-haul pleasure travellers: 2012 n = 1,563, 2014 n = 1,499
Note: Average ratings for all *value* attributes, based on a ten-point scale on agreement with the statements presented to them.

The somewhat dramatic increase in the score for the US was driven by higher ratings for: *a destination with the travel experiences I am specifically looking for*, *a destination I would pay a little more for*, and most notably, *a place with unique features that other destinations don't offer*.

While all the signs point to the fact that the UK economy is recovering, travellers are increasingly looking for *value* from their vacation-spend, with domestic vacations and short city-breaks having seen a huge surge in popularity.

To compete with New Zealand, Australia and, most importantly, the US, Canada has to be perceived as offering a raft of highly-value and unique experiences. Ultimately the perceived *value* on offer will drive consideration and determine which destination they choose.

Price perceptions

While Australia and New Zealand may be perceived to be best-placed to offer the kind of experiences UK long-haul travellers are looking for, they remain expensive destinations to travel to, as shown in Exhibit 7-4.

The US is considered by far to be the more affordable option, and some way ahead of Canada, while also offering reasonable prices for the major vacation expense items – overall it is perceived to offer the best *value for money*.

While Canada does place ahead of both Australia and New Zealand, by a considerable margin, it is worth noting that only thirty-nine percent of UK travellers were inclined to agree that Canada is a destination that is *affordable to get to by air*, and the *cost* of a vacation to Canada remains the most often-mentioned barrier to visitation[29] for those *considering* a trip to Canada.

UK travellers concerned with value and cost may look to Thailand as a more affordable option, with Canada positioned more closely to Australia and New Zealand on all but the cost of the flight.

In terms of the perceived cost of transportation, accommodation and other major vacation expenses, much depends on economic factors that are susceptible to change[30].

Overall, across all three *price* attributes, Canada averaged a score of 6.8 (out of ten), ahead of Australia (6.3), New Zealand (6.4) and Thailand (6.5), but behind the US (7.3).

Exhibit 7-4 Price perceptions

Price Perceptions	1#	2#	3#	4#	5#	6#	7#
A destination that is affordable to get to by air	USA 52%	CAN 39%	THA 32%	AUS 29%	IND 26%	SAF 25%	NZ 25%
A destination with reasonable prices for food, entertainment and accommodation	USA 59%	THA 44%	CAN 41%	NZ 40%	IND 39%	AUS 37%	SAF 31%
A place that offers good value for money	USA 55%	THA 43%	CAN 40%	IND 39%	AUS 39%	NZ 38%	SAF 30%

Base: Long-haul pleasure travellers (n = 1,499)
Q11: We are interested in your general impressions on [country] as a holiday destination, even if you have never been there. On a scale of 1 to 10, where 1 is 'strongly disagree' and 10 is 'strongly agree', how would you rate [country] on each of the following?
Note: Scores shown are the 'top-three-box scores' i.e., the percentage of respondents who provided the destination with a rating of 8, 9 or 10, on a 1 to 10 scale of agreement with each statement.

[29] Based on the results of QTI3: 'Which of the following factors might discourage you from visiting Canada?'. Twenty-six percent of those *considering a trip to Canada* already, cited the fact that it was *too expensive*. See Exhibit 10-1).
[30] It was noted in the *Methodology* section of this report that the survey was conducted around the time the Canadian Dollar ($) started to lose significant ground to the British Pound (£) – a trend which continued throughout the fourth quarter of 2014 and into early 2015.

8. Trip Profiles

The following section describes the most recent long-haul trip taken by UK travellers[31], in the past three years. Where that trip might have included more than one destination, the results refer to the destination they *spent the most time in*.

Most recent destination visited

Seven percent of UK long-haul travellers visited Canada for their most recent long-haul vacation – unchanged from reported figures in 2012. The incidence of travel to Canada rises significantly to 11% among those aged fifty-five years or older, and those with relatives living here (16%).

The US remains the most popular long-haul destination, with almost one-in-three (34%) having taken their last trip there, a slight fall over 2012 (37%). Travellers over the age of thirty-five are more likely to have taken a trip there (41%), as are those who do not have relatives in Canada (38%).

The Caribbean remains a top draw for the UK long-haul traveller – one-in-ten (11%) took their last long-haul vacation to one of the islands (17% in the past three years) compared to 9% in 2012. It is especially popular among those aged between 35 and 54 years (16%).

Type of vacation taken

Based on their most recent *long-haul vacation*, around one-in-five (21%) UK travellers cited their main reason for travelling as *visiting friends or family*, a figure which rises significantly among travellers aged 55 years or older (27%), and those with a lower-than-average household income (25%).

Resort vacations were the next most popular reason for making the trip, but notably for travellers aged between 35 and 54 years – almost one-in-four (24%). *Touring vacations* also showed a strong age skew towards older travellers and those travelling without children.

Among those UK travellers whose last trip was to Canada, *visiting friends and family* was the main reason for one-in-three (34%), with *touring vacations* accounting for one-in-four (24%). Again, there were some marked differences among the age groups, with younger travellers more likely to have been visiting for a *city vacation* (25%).

Activities participated in

Overall, the most popular activity enjoyed was a *guided city tour* (26%), closely followed by *wildlife viewing* and *guided excursions beyond the city*. The same three activities were also the most popular among those UK travellers whose last trip was to Canada.

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[31] Based on Q26: *'Which of these destinations [in the past three years] did you visit on your most recent trip?'* and Q27: *'Which* destination *did you spend the most time in?'*

While among older visitors to Canada (55+), the three most popular activities were *guided city tours* (36%), *wildlife viewing* (25%) and *guided excursions beyond the city* (25%), younger travellers (under 35) had slightly different priorities: *wildlife viewing* (25%), *guided city tours* (18%) and *camping* (16%).

Exhibit 8-1 Most recent trip: Activities participated in (Top-ten)

Activity Participated In	All Long-Haul Travellers n = 1,225	Recent Visitors to Canada[32] n = 299
Guided city tour	26%	31%
Wildlife viewing	24%	25%
Guided excursion beyond the city	22%	22%
Day cruise	16%	16%
Marine life viewing (whale-watching or other sea life)	14%	11%
Hiking	10%	10%
Snorkeling	10%	1%
Cycling or biking	8%	8%
Flightseeing (by plane or helicopter)	8%	11%
Fishing	7%	8%

Base: Those who have taken a long-haul pleasure trip in the past 3 years (n = 1,225)
QPT2: Did you participate in any of the following activities during your most recent stay?.
Note: New question added for 2014.

Places visited

While the top attraction for UK long-haul visitors was *visiting historic sites* (46%), those visiting Canada were more likely to have *visited a Provincial or National Park* (53%), especially those aged 55 years or older (62%).

Visiting historical places of interest was revealed as a key *product interest* in the 2012 survey of long-haul UK travellers, consistent with travellers in Canada's other international markets. In this area, Canada faces a challenge on two fronts: those places of interest are less well-known to travellers in Canada's international markets; and, they are spread far apart.

[32] Visited Canada in the past three years for a pleasure trip of four or more nights with one or more nights in paid accommodations.

Exhibit 8-2 Most recent trip: Places visited (Top-ten)

Places Visited on Vacation	All Long-Haul Travellers n = 1,225	Recent Visitors to Canada n = 299
Historic site or building	46%	50%
Museum	38%	44%
City park	36%	48%
National or Provincial park	35%	53%
World heritage site	25%	24%
Botanical garden	24%	29%
Amusement or theme park	20%	12%
Art gallery	17%	25%
Casino	11%	11%
Winery	10%	12%

Base: Those who have taken a long-haul pleasure trip in the past 3 years (n = 1,225)
QPT3: Did you visit any of the following types of places during your last holiday? Please select all that apply.
Note: New question added for 2014.

Vacation experiences

Most of the popular experiences enjoyed while on vacation were similar for both *recent visitors to Canada* and all other long-haul destinations alike. A few notable differences were that among those who had been to Canada in the past three years, they were more likely to have *rented a car*, and more likely to have participated in a *guided tour by train*.

Overall (based on all long-haul travel), among UK long-haul travellers, there were also some notable differences by age group. Younger travellers – those aged 18 to 34 years, were more likely to have *visited a museum to learn about aboriginal people*, *visited a spa or wellness center*, *attended a music festival*, tried *agritourism* or viewed the *southern / northern lights* – when compared to those aged 35 years or older.

Those over the age of fifty-five had a higher propensity for *trying local cuisine, dining at a highly regarded restaurant, renting a car,* and *attending a live show (*e.g. a musical, theatre or comedy show).

Recent visitors to Canada are also far more likely to have rented a car, compared to vacations to other long-haul destinations. Whether by necessity, or by preference, over a third (37%) opted to rent a car while here – a significantly higher number that the average for all destinations (28%).

Exhibit 8-3 Most recent trip: Experiences (Top-five)

Experience	All Long-Haul Travellers n = 1,225	Recent Visitors to Canada n = 299
Tried local cuisine	64%	63%
Dined at a highly-regarded restaurant	32%	29%
Rented a car	28%	37%
Attended a live show (e.g., comedy, musical or theatre show)	24%	17%
Took a tour or visited a museum to learn about aboriginal people	17%	19%

Base: Those who have taken a long-haul pleasure trip in the past 3 years (n = 1,225)
QPT4: Did you see or experience any of the following during your last holiday? Please select all that apply.
Note: New question added for 2014

Type of accommodation

Visitors to Canada from the UK were almost as likely to have stayed with *friends or family* (37%) as a (mid-priced) *hotel* (40%), although half of travellers aged 55+ (50%) were likely to opt for the hotel.

Almost one-in-four (23%) spent their last long-haul vacation in a *resort hotel*, with visitors to Canada only half as likely – not surprising perhaps given the fact that they are less prevalent in Canada compared to other long-haul destinations.

Travel party

The majority of UK travellers (60%) took their last vacation with their spouse or partner, and the same was true of those whose last long-haul trip was to Canada.

The likelihood of travelling with a partner or spouse increases with age (70% of those aged 55+), while those aged 35 to 54 are more likely to be travelling with children (29%), compared to others.

More than one-in-five (22%) of UK travellers under the age of 35 are likely to be travelling with friends – significantly more than those aged 35 or over. They are also the group most likely to be travelling alone (17%).

Sharing experiences *during* the trip

Increasingly, travellers are turning to the internet and social media to share their experiences and to search for information *while on their trip*. Around one-in-three (36%) UK long-haul travellers shared photos of their vacation *while on holiday*, but this figure rises dramatically to over half (53%) of those aged between 18 and 34 years of age.

Almost a quarter (23%) will send those photos or videos via email, again *while on vacation*, and there is a much less notable age skew compared to social media.

The same is true of using the internet to research *what to see and do* – a third (33%) of those aged 35 to 54 will do some of their research while on their trip, but more than a quarter of those below 35 years (27%) and over 55 years (27%) will also search the web for information and guidance.

Sharing experiences *after* the trip

On returning home, a third of UK travellers (32%) will share their photos, videos or opinions about their holiday via social media, and one-quarter (24%) via email. Again, it was the younger travellers who were far more likely to turn to social media, while those over the age of fifty-five were very likely to talk to friends or family in person (83%).

More than one-in-ten (14%) of those aged 18 to 34 years were likely to blog about their trip, while some (18%) submit a review to a travel website.

Booking travel

More than a third (36%) of UK travellers employed a travel agent to book either their flights or accommodation – a proportion that rises significantly for those aged 18 to 34 years (41%). Among those who chose not to employ a travel agent, the majority (57%) booked their flights directly with the airline.

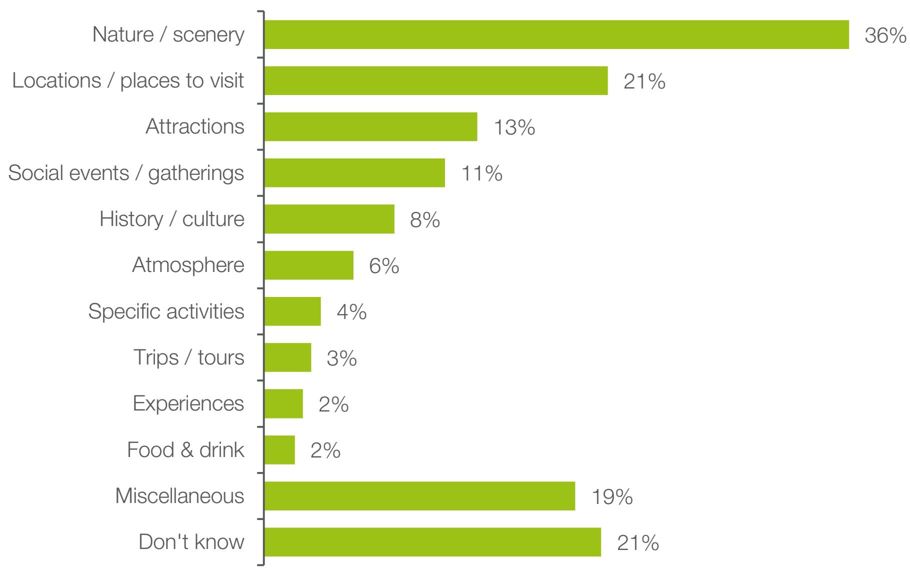
9. Attraction of Canada

Most appealing aspects of a trip to Canada

A new question for 2014[33] asked those travellers *considering a trip to Canada* what intrigued or excited them most about a potential visit to Canada?[34].

Exhibit 9-1 shows the coded results, grouped by common themes, revealing those aspects of a potential trip to Canada which UK travellers were most enthused about.

Exhibit 9-1 What intrigues or excites you most about a potential trip to Canada? – Top-ten mentions by UK travellers *considering a trip to Canada*



Base: Respondents considering a trip to Canada (n = 648)
QTI1: "What intrigues or excites you most about a potential visit to Canada?"
Note: New question for 2014
Note: Open-ended question – results shown are the coded (grouped) responses)

By far the most appealing aspect of their potential trip was the natural geography, more specifically: the *beautiful scenery and landscapes* (23%), the *Rocky Mountains* (4%) and *mountains* in general (3%). Interest in the natural geography rose significantly for those aged fifty-five or over (45%).

One-in-five travellers (21%) mentioned the fact that there were *many places to visit* (5%), *great places to visit* (4%), or more specifically, particular Provinces or Territories they were looking forward to visiting (3%). Again, this was noticeably higher for those over fifty-five (34%).

In terms of *attractions*, the most often mentioned experiences were *viewing wildlife / animals* (7%) and the *Niagara Falls* (3%). Specific, named attractions, such as Niagara Falls and the

[33] QTI1 – "What intrigues or excites you most about a potential visit to Canada?"
[34] Asked as an open-ended question, without prompt

Rocky Mountains received relatively few mentions (3% and 4% respectively) compared to more generalised facets, such as simply seeing *natural scenery and landscapes*.

Collectively, *social gatherings and events* accounted for one-in-ten (11%) mentions, mainly involving *visits to see their family* (10%).

There is little doubt that Canada is well-recognized for offering outstanding natural scenery. Based on 2012 GTW, Canada was placed first among its competitive set of long-haul destinations for *seeing beautiful scenery*, and second for related attributes such as: *visiting national parks and protected areas, exploring nature with city amenities nearby, resort experiences in natural settings* as well as both *land* and *water-based journeys* (Canadian Tourism Commission, 2013).

Beautiful scenery was also revealed to be the top product interest in all four of Canada's *core* long-haul markets[35] (including the UK) – so it is a feature which is highly valued and sought after by long-haul travellers in this market (Canadian Tourism Commission, 2014).

While Canada has been successful in marketing this natural asset[36], on a cautionary note, travellers are looking for a broad range of experiences on their travels in order to derive what they consider to be *value* for their money. Findings from the 2012 GTW suggest that the availability of a broad range of attractions is important in the selection of a destination. In 2014, the study confirms that Canada's natural attractions remain by far the main draw while other types of experiences, including history/culture, visiting specific places, social events and gatherings, are secondary sources of excitement for potential travellers to Canada.

These GTW findings suggest that while Canada's natural beauty and outdoor experiences are clearly a strength of its offer, it needs to be able to demonstrate a wider range of experiences to be pervasive enough to compete with the US, Australia and New Zealand, as well as other long-haul and short-haul destinations.

Among the younger age group (18 to 34 year olds), the most common response was that they simply *did not know* what intrigued or excited them most about Canada - almost a third (31%), Beyond the natural geography (27%), they weren't really able to articulate why they were interested in Canada.

[35] Australia, France, Germany and the UK.
[36] The brand attributes most often associated with Canada are those relating to scenery and natural beauty.

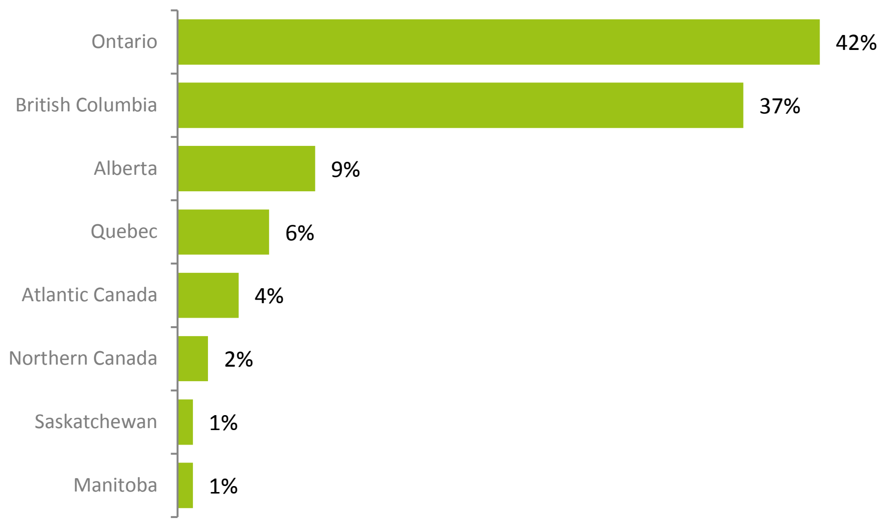
Canadian regions likely to visit

Exhibit 9-2 reveals the regions UK travellers are most likely to visit, based on those considering a trip to Canada in the next two years.

Ontario remains the province UK travellers are most likely to visit, driven by interest from those aged 35 years or older, but among younger travellers (18 to 34 years), British Columbia (BC) is the top draw. Quebec and Alberta also notably skew towards those aged over fifty-five years.

Interest in BC, has been on the increase since 2008 (28%) and saw a significant increase over 2012 (31%). While over the same period, consideration for Ontario has fallen from 48%, the figures have remained relatively unchanged in the last few years[37].

Exhibit 9-2 Region likely to visit in Canada



Base: Q16 Those likely to visit Canada in the next 2 years and / or those who are considering, have decided to visit or have booked a trip there, Q17 Long-haul pleasure travellers with an interest in visiting Canada (n = 839)
Q17: "And, which region of Canada would you be most likely to visit?"

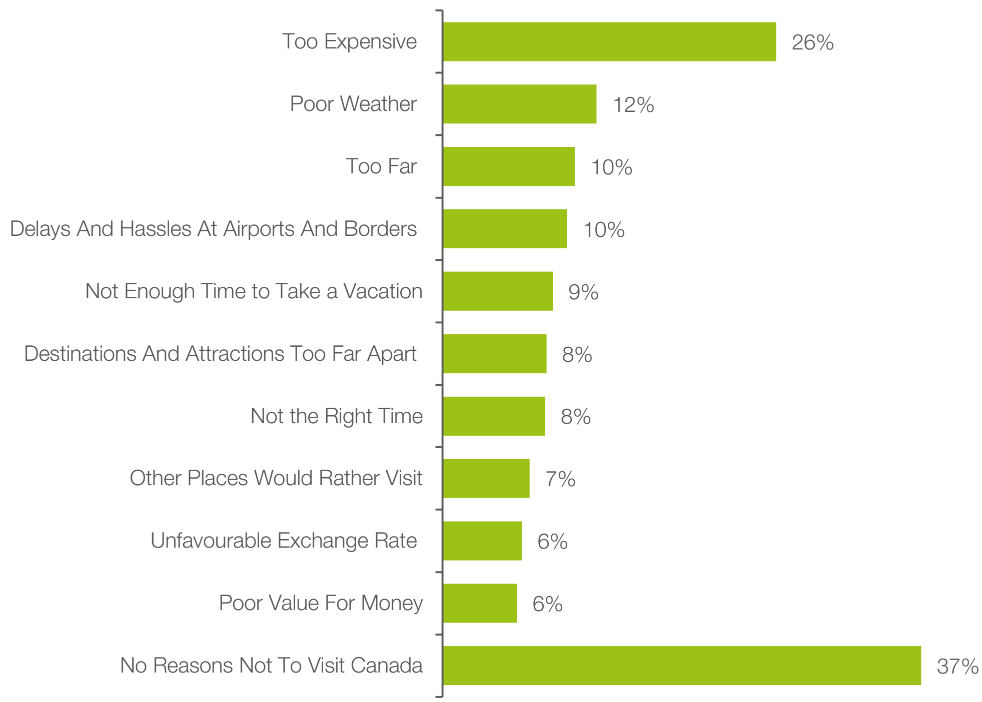
[37] 41% in 2011 and 42% in 2012.

10. Barriers to visiting Canada

Among those UK travellers who are *considering a trip to Canada*, the main deterrent from visiting remains the perception that it is *too expensive*, as shown in Exhibit 10-1 – more than one-in-four (26%) cited this reason, particularly those aged 35 to 54 years (31%) and those with lower-household incomes.

Given the recent economic climate in the UK following the global recession in 2008, and the corresponding rise in domestic vacations and short-haul travel, concern over the cost of long-haul travel continues to be the major barrier in attracting visitors from the UK.

Exhibit 10-1 Top-ten barriers to visiting Canada, among those *considering a trip to Canada*



Base: Those who are considering a trip to Canada (n = 648)
QTI3: Which of the following factors might discourage you from visiting Canada?

While little can be done to effectively reduce the *cost* of travel to Canada, the perceived *value* of a vacation this side of the Atlantic could certainly be improved, given that Canada lags behind the US on perceptions of both *value* and *price* (see Exhibit 7-2 and Exhibit 7-4). The improving economic situation and more favorable exchange rate in the UK are opportunities to enhance the price and value perceptions about Canada.

Overall, more than a third of UK travellers (37%) agree that there is *no reason not to travel to Canada* – in all likelihood, if it was cheaper to travel to Canada relative to competing vacation destinations (both short and long-haul), or if the perceived *value* of a vacation to Canada was significantly improved, little else would actually *prevent* them from coming.

11. Sources of information on Canada

Source of awareness

Almost one-in-four (23%) UK travellers had heard about Canada, or Canadian destinations, through *friends and family in-person*, while one-in-ten (11%) mentioned *friends and family via a social network*.

These results are consistent with those for *all long-haul destinations* – one-in-three travellers (34%) identified *friends and family* as a source of information regarding long-haul destinations in general[38].

This is not to say that this was the *only* source which they consulted[39], or through which they had heard about those destinations, and in reality, they may have consulted other sources as they moved further along the *path-to-purchase*.

Most influential sources

Asked outright what were the most *influential* sources when it came to choosing a holiday destination, *friends and family in-person* again came out on top[40].

The importance of advocacy from friends and family is further exemplified when looking at the sources of information that *encouraged consideration for Canada* – almost half (46%) pointed to *friends and family in person*[41].

Other *influential* sources mentioned were: *travel guides or books, travel agents (in-person), websites dedicated to visitors and tourists, and traveller review websites* (such as TripAdvisor).

Generally, in this market and others, we are witnessing a clear trend towards *trusted* and *earned sources* when it comes to influencing consumer's decisions on purchases (as opposed to *paid-for media*[42]*)*.

Earned media is becoming increasingly prevalent thanks to social media (e.g., *mentions, shares, likes, re-posts* and reviews), but continues to include traditional content media, such as articles in print. To be considered *trusted*, sources must be *perceived* to be independent, non-biased and without sponsorship (from a company or organisation).

[38] Q20A – "Through which of the following sources, if any, have you seen or heard about international vacations for destinations outside of Europe, North Africa and the Mediterranean, in the past year?"
[39] Respondents were asked to select *all sources*, and multiple selections were permitted.
[40] Asked to rate the influence of *friends and family* on their choice of vacation destination, 76% of UK travellers rated it between 8 and 10, on a ten-point scale, where 10 is very influential and 1 is not influential at all.
[41] QTI2 – "Where did you see, read or hear the information that encouraged you to seriously consider visiting or returning to Canada in the next two years?"
[42] *POEM* – Paid, owned and earned media is a relatively recent means of describing communications which has gained popularity due to the increasing prevalence of digital marketing.

It is perhaps not surprising then that the least *influential* sources of information for this market were: Online advertising (21%), Email promotions / newsletters (25%), Out-of-home advertising (26%), magazine / newspaper advertising (26%), radio programming or advertising (30%) and TV advertising (31%) – in short, *advertising*.

It is important to note that these results are based on *what travellers tell us are influential*. The degree to which they are *actually* influenced, either consciously or not, through paid-for media is debatable. Their understanding of what is, in fact, 'independent' is also based on their perceptions.

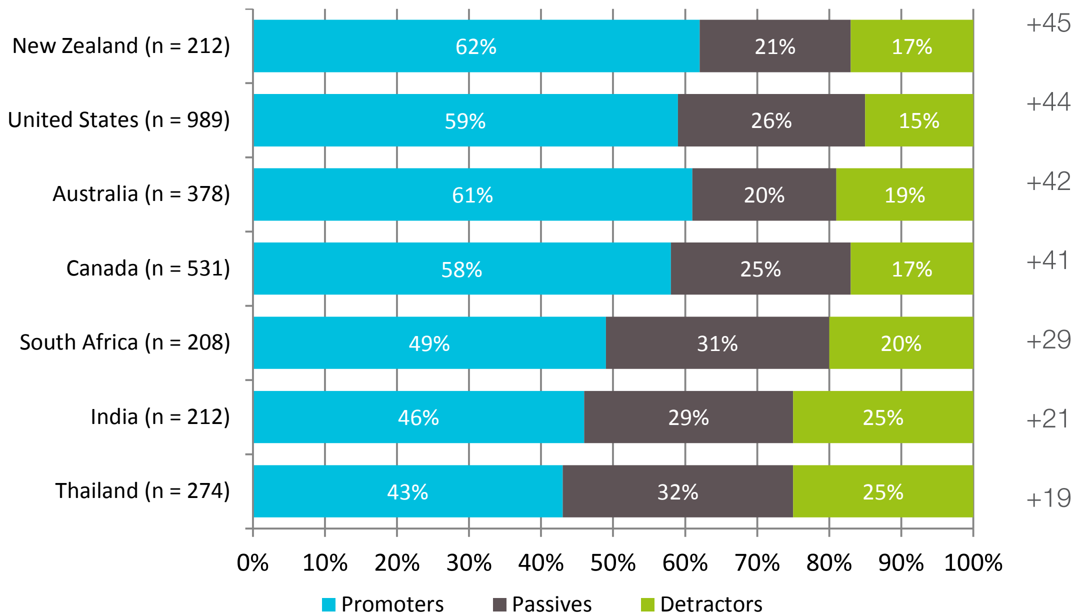
However, the importance of *trusted* and *earned media* should not be underestimated and whether it is through traditional *word-of-mouth*, or facilitated through social media, online applications or other digital channels, it is hard to ignore the increasing shift towards

12. Net Promoter Score (NPS)

The Net Promoter Score (NPS) is an established tool to measure a respondent's likelihood to recommend a product or service to friends and family. Data was gathered among all respondents, but results from past visitors to each destination are the most telling and are presented below.

Of the 531 UK travellers who had actually visited Canada, 58% would recommend it to friends, family and colleagues, while 17% would not – resulting in an NPS score of +41[43].

Exhibit 12-1 Net Promoter Score (NPS) results (Ever Visited)



Q3: 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?
Base for each country is filtered to only those respondents who had actually visited *that* country.
Note: Results ranked in descending order according to the overall NPS score.

In 2012, Canada placed second behind New Zealand, and ahead of Australia and the US. It is worth noting that the NPS scores for all destinations in 2014 were down on the previous reporting period (among UK travellers), but the fall in the relative position of Canada in this ranking is somewhat of a concern.

The NPS score is not only a measure of consumer satisfaction (measured by how likely they would be recommend the destination the others), but a barometer of the potential opportunity to promote the destination through *advocacy.* As discussed in the previous section, advocacy through friends and family is the most influential source of information when it comes to choosing a holiday destination, far more so than paid advertising.

[43] That is 58% minus 17% = 41%, or +41 as we report it. Note that negative NPS scores are possible.

In terms of *perceptions* about Canada, and reviewing the NPS scores for *all UK long-haul travellers* (not just those who have visited Canada), those most likely to recommend a vacation here[44] are those over the age of fifty-five, and those with higher household incomes. Least likely to recommend Canada are the 18 to 34 year olds.

Among the younger age group, whether they have been there or not, the US is the most likely destination to be recommended to friends, family and colleagues – by some way. Canada and Australia lead the chasing pack of long-haul options.

The immediate implication for Canada is that most of this country's biggest advocates are over the age of fifty-five. It may also speak to how Canada's offer aligns with UK travellers' interest.

[44] Based on the net result of promoters minus detractors (the NPS scores).

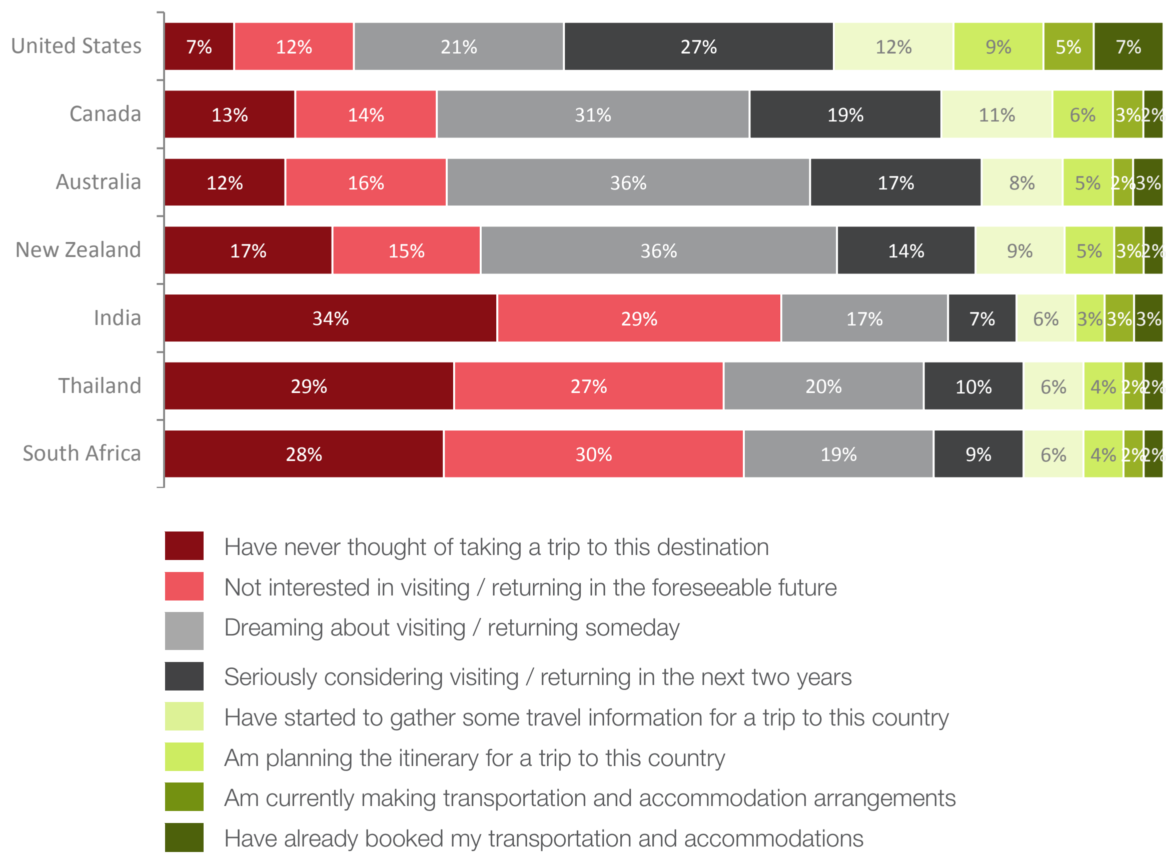
13. Path to purchase

Like any other expensive and discretionary consumer product, there is a purchasing or decision-making cycle associated with long-haul travel: consumers move through various stages from not knowing anything about a destination to actually booking a trip.

Through additional research, the CTC has developed a Path to Purchase (P2P) model for long-haul travel and identified where the organization can have the greatest influence in converting those with potential interest in Canada to actual visitors.

These include the consideration, evaluation and purchase stages of the P2P cycle, starting with awareness of the opportunity and interest in a destination, through to booking their itinerary, travel and accommodations.

Exhibit 13-1 Stage in the path-to-purchase



Base: Long-haul pleasure travellers (n = 1,499).
Q3: Which of the following best describes your current situation when thinking about each of the following countries for a holiday trip?
Note: Additional stage on the 'path to purchase model' was added for 2014 – 'Have never thought of taking a trip to this destination'. Results not directly comparable to previous years.
Note: Results ranked in descending order according to the number of travellers who: *are planning the itinerary for their trip, making transportation and / or accommodation arrangements for their trip,* or *have already booked transportation and accommodations*.

Exhibit 13-1 shows the percentage of UK travellers at each stage of the P2P, for both Canada and the competitive set of long-haul destinations.

Just over a quarter (27%) of UK long-haul travellers have either *never thought of taking a trip to Canada*, or are *not interested in visiting or returning in the foreseeable future*. At the other end of the path, just less than a quarter (22%) have either *started to gather information for a trip to Canada*, or are more further-advanced with their plans.

Around 5% are either currently making arrangements, or have already booked transportation and accommodation – around the same number as those planning a trip to New Zealand, Australia or India.

The US leads Canada and the competitive set on the more advanced stages of planning and preparation – 12% have either booked, or are booking, travel and accommodation.

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[45] Sources are documented according to the guidelines described in the fifth edition of the APA's 'Publication manual', a recognised international standard for social and behavioural sciences.