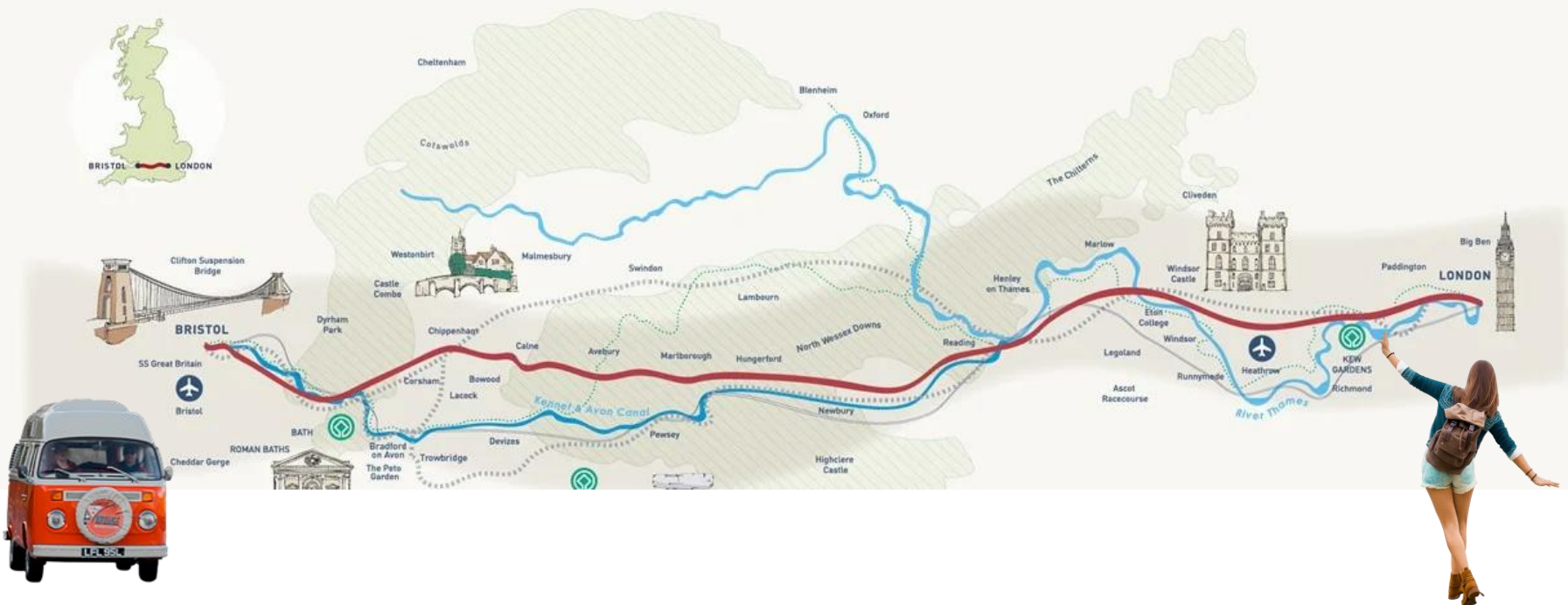


Canada Market Presentation



GREAT WEST WAY ROUTE MAP



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Intern

Current Landscape



Political

- Elections in May 2025 - Prime Minister Mark Carney, Liberal Party of Canada
- Promising discussions between Canadian prime Minister and British Prime Minister earlier in May and now for G7 in June
- Positive impact of King Charles's recent visit to Ottawa

Economic

- Tariffs: Retaliatory tariffs on U.S. goods
- Unemployment Rate: As of May 2025, Canada's unemployment rate rose to 7%
- GDP Growth: Canada's GDP grew at an annualized rate of 2.2% in the first quarter of 2025
- Currency exchange: GBP 1 – CAD 1.84

Social

- Canada's relationship with the monarchy is useful as it helps set us apart from our neighbours to the south
- National parks and historic sites available for free this summer — a move that comes as many Canadians alter their plans to travel to the U.S.

Tourism

- Excluding the US, Canadian outbound trips are forecast to grow 8% this year benefiting European destinations*
- Air Canada, announced an expansion of its European network, operating new routes and gateways.
- 71% of Canadian travellers are concerned about the impacts of overtourism



Where Canadian visitors to the UK reside (2022)

Top provinces by visitors to UK:

#1 Ontario – 418,000 (47%)

#2 British Columbia – 182,000 (20%)

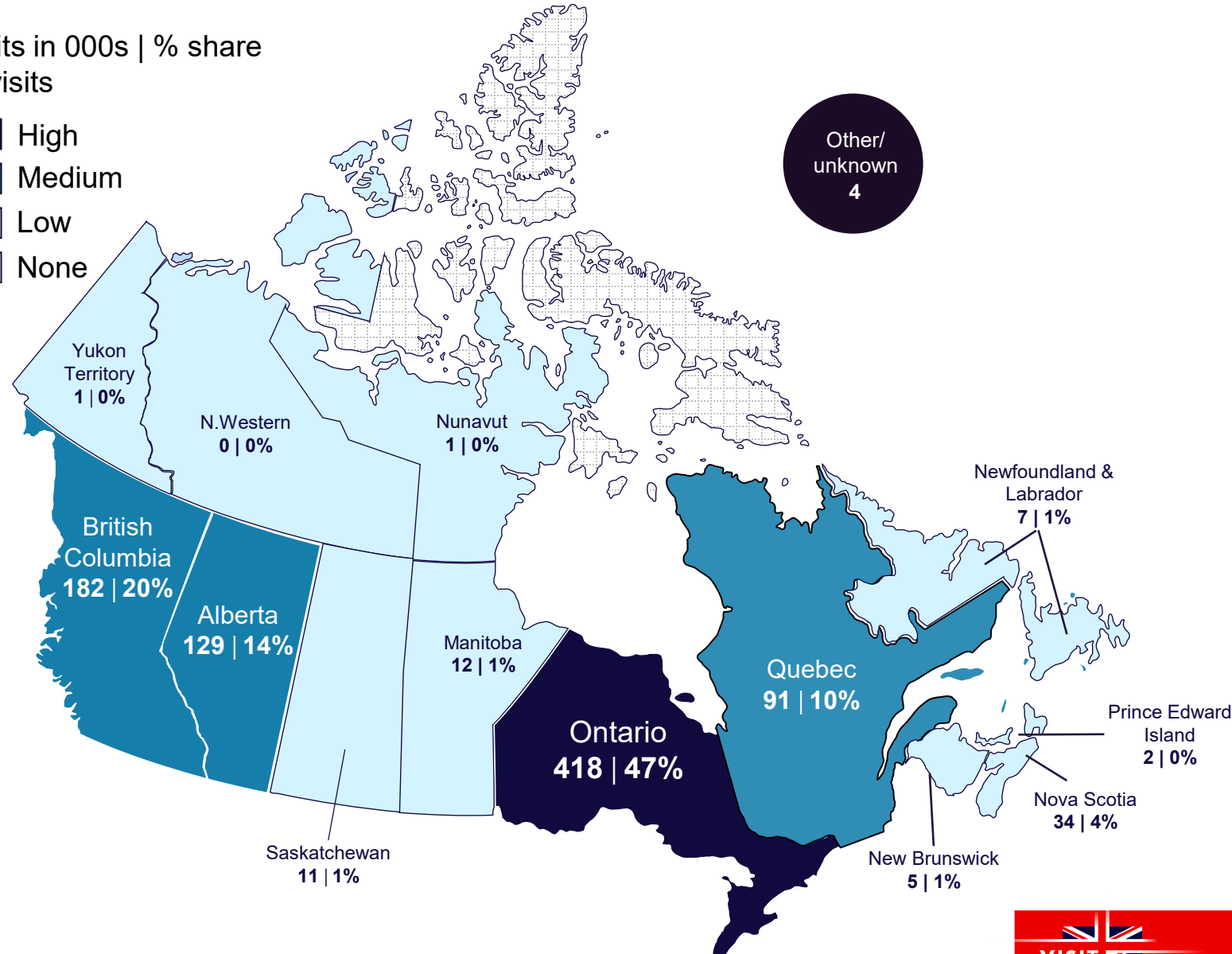
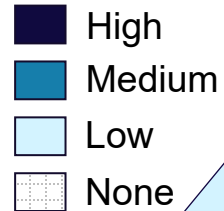
#3 Alberta – 129,000 (14%)

#4 Quebec - 91,000 (10%)

#5 Nova Scotia – 34,000 (4%)

- Almost half of visitors to the UK are from Ontario.
- Ontario and British Columbia represent 2 in 3 visits to the UK.

Visits in 000s | % share of visits

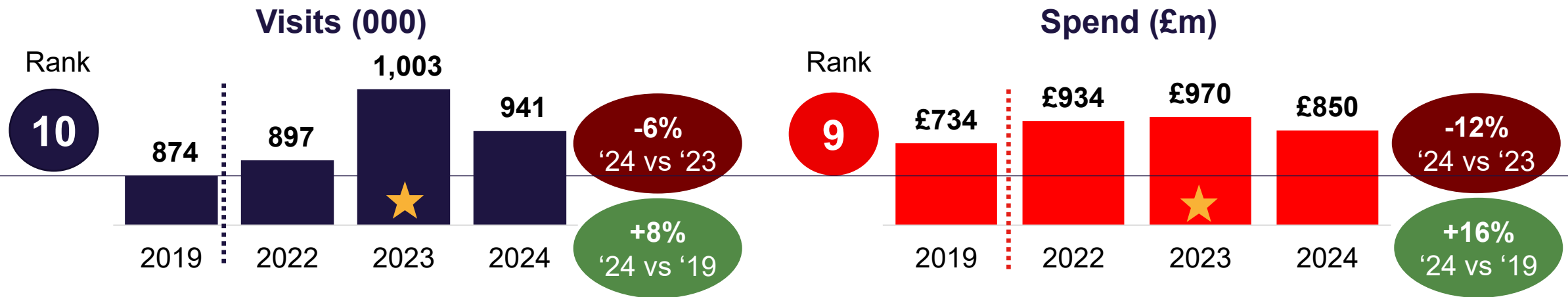


Source: International Passenger Survey by ONS, 2022. Question not asked of Canadian visitors in 2024.





Volume and value of visitors to the UK – trends



International Passenger Survey by the ONS 2024 (Provisional) or for other years as stated.
All values and percentage changes in spend are in nominal terms.

★ Records are marked with a star

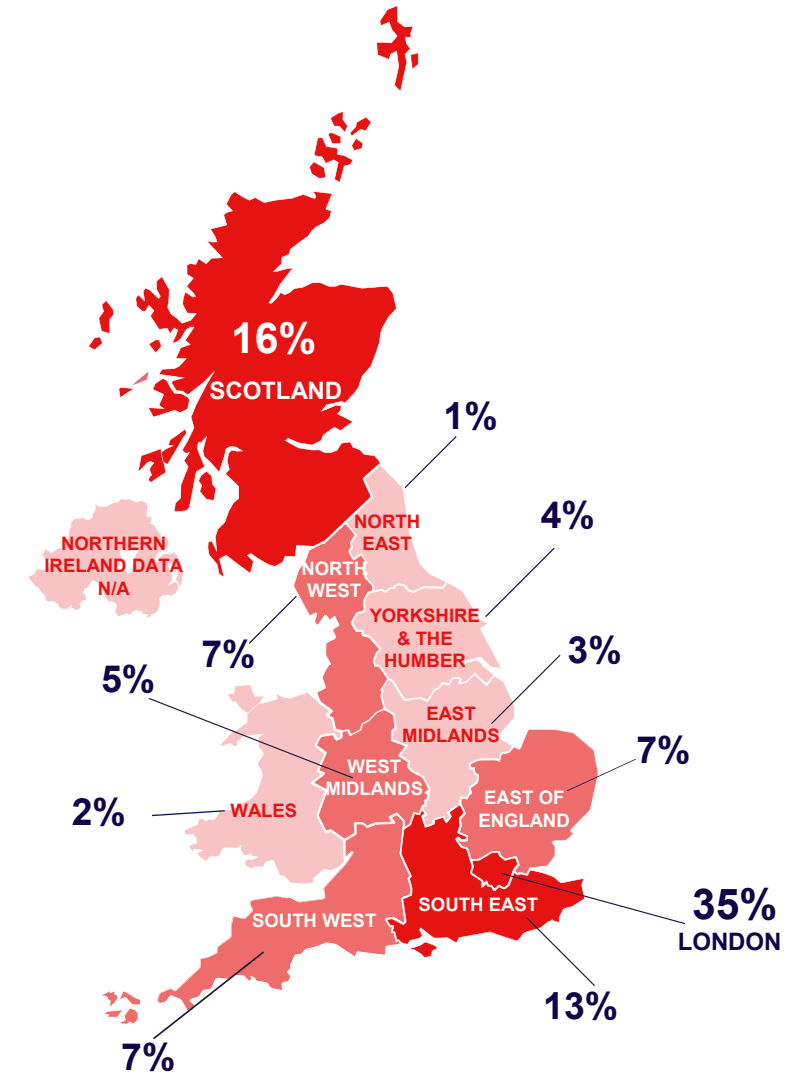




Nights spent in the UK by region (2024)

% Share of nights spent in the UK

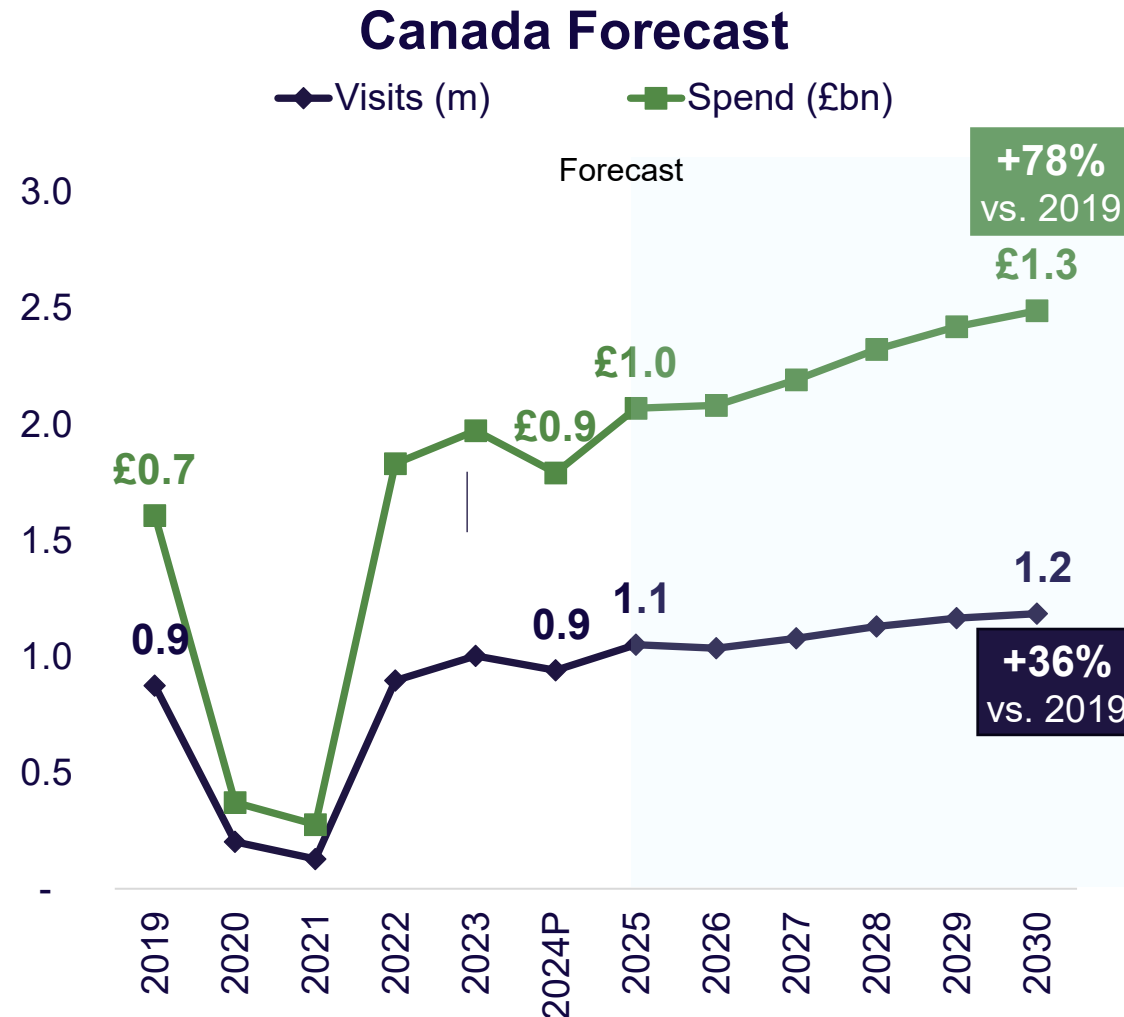
Based on visitor nights	UK inbound average (2024)	Canada (2022, 2023, 2024)
London	41%	35%
Rest Of England	46%	46%
- <i>Southern England</i>	20%	19%
- <i>England's North Country</i>	12%	11%
- <i>Central England</i>	14%	15%
Scotland	11%	16%
Wales	2%	2%



Source: International Passenger Survey by ONS, 2024 (Provisional). Provisional 2024 data is not available for Northern Ireland. Data for Canada based on a 3 year average of nights in 2022, 2023, 2024 (Provisional)



Market Forecasts – visits and spend to the UK to 2030



Please note that these forecasts are frequently updated to take latest data and developments into account.

Source: International Passenger Survey by ONS, Forecast run May 2025 based on Oxford Economics/VisitBritain



Key Trade Account Locations



Travel Trade Trends

- BOOKINGS

- Mix of long-lead bookings and shorter booking period
- Increase in last minute bookings
- Growing Autumn period
- Increase in smaller groups of 16-18 pax
- South Africa, Japan and Southeast Asia are on a boom
- London still prominent, rising demand for other cities across England like Bath and Bristol

- AVIATION

- Increase in airline capacity
- Departures from 7 CA airports to 5 UK airports
- New: Virgin Atlantic Toronto – London; Porter (Air Transat Alliance) Toronto - London Gatwick
- Relaunch Air Canada Ottawa - London seasonal service & Montreal – Edinburgh seasonal
- British Airways increased capacity out of Vancouver



Opportunities and Challenges

Opportunities to capitalise on

- **10th** ranked inbound market for the UK for 2025
- **Improved perceptions** of the UK as per NBI 2024 – Rank 3
- **Increased regional spread:** share of Canadian nights - London 35%; 47% in RoE
- **Stay longer:** 10 nights typically
- **Repeat visitors:** Second highest rate of returning holidaymakers of the region
- **Aviation investment:** increased airline routes & seat capacity
- **Starring GREAT Britain in Canada:** Approx. 70% of Canadian travellers are interested to visit film & TV locations with some or no influence included

Challenges to bear in mind

- **CA – UK currency** exchange rate
- **Cost of living:** tariffs, high unemployment rate, looming recession ahead to slow down economy
- **Accommodation availability:** challenges between May-Oct,
- **Competition & Investment:** from European markets (France, Portugal, Italy, Ireland) and USA
- **Seasonal:** challenges for Christmas departures
- **Multi-country trips:** 69% go on European multi-country trip



Insights & Consumer Behaviour

Key Insights

- Repeat visitors and keen to explore beyond London and Edinburgh
- Strong regional spread of travel and growing
- Robust interest in curated & experiential
- Longer nights and value conscious
- Steady increase in 60+ clientele along with the 35+ clientele. Multi-gen travel.
- Extended shoulder season (April – October)
- Mixed market feedback on bookings for summer 2025

Forecasted Consumer Behaviour

- Current economic turmoil
- Rise in changing demographics from immigration
- Steady growth in holiday travel compared to VFR
- Summer 2025 - 72% of Canadian leisure travellers excited to explore international travel & plan to spend more than 2024
- Family travel on the rise along with curated experiential travel

Activity Highlights 25/26



- **DBNA 2025 – Mexico**
 - CA Buyers
 - Trade Media
- **Trade Workshops – October 2025**
 - Calgary, Alberta
 - Edmonton, Alberta
 - Mississauga, Ontario
- **Dedicated Webinars for UK partners**
 - Reach 1500 CA trade subscribers
- **Travel Agent FAM with Airline Partnership**
 - Dates TBC
- **BIM with Tour Operator FAM**
 - January / February 2026
- **Ongoing:** KAM, industry partner/stakeholder engagements, monthly newsletters

