

Great West Way Connections – North American Update

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Market Update - USA

1. Update on travel to Britain

- Pax numbers to Britain in 2023 are looking to rival 2019 with some operators stating that they are already above their 2019 visitor numbers.
- Increased product pricing in the tourism/hospitality sector has contributed significantly to the recent increase in visitor spend. However, most Tour Operators seem to be understanding of the price increases, recognizing that they are essential in the industries recovery.
- Although the service industry has not fully recovered in regards to staffing and service levels, many are finding this has not deterred travellers to Britain or other destinations.

2. Travel trends

- Recent IPS data demonstrates that the US is leading the inbound tourism recovery in the UK. Data from Jan – Sept 2022 show visits are near approaching pre-pandemic levels, 98% of volume recorded in 2019 while spend has significantly exceeded 2019 levels, up +40%.
- Britain is bouncing back with visits to traditional locations and key cities although some consumers do look to get outside of e.g., London/Edinburgh and visit the lesser known areas/regions.
- More special interest groups are emerging with interests in, eg., Multi-Gen; Music/Concerts, Knitting/Basket Weaving and the usual Sport/Performing Arts groups.
- Hub & spoke trips are also on the increase where consumers can stay in one destination yet tour outside on day trips.

3. Consumer sentiment in general on travel

- Travel in general to Britain is no longer a worry in regards to Covid with relaxed rules. There is less concern or worry of catching Covid/something else.
- There are some concerns surrounding travel within Britain in regards to train strikes, cost/availability of hire cars and lack of availability of **chauffeur/driver-guides**. **The latter was consistently mentioned by the FIT operators whom have a strong need for qualified driver-guides.**
- N/American Tour Operators do find that networking events like ExGB, DBNA and BIM help them in connecting with new suppliers that can help with their challenges (i.e. meeting new coach companies, sourcing driver guides, etc.) and the educational familiarization trips are key to experiencing the product first-hand.

4. Other relevant trends/information

- Many operators have mentioned that their clients are looking to add a one off signature-experience to their trip, such as Food tour experiences and exclusive entrances into Attractions, for example.
- Operators are finding that hotels are focused on dynamic pricing - making it more difficult for them as they prefer static rates. Static rates make it easier for the operators to stick with certain hotels based on pricing, without having to worry about the dynamic rate increases.
- Competitor destinations include the usual suspects of France, Italy, Spain, Greece and Ireland as well as increasing interest in Portugal.

Market Update – Canada

1. Update on travel trade

- Travel agents are in demand by prospective Canadian travelers. In 2022, CAA saw a 126% increase in bookings using travel consultants in comparison to 2021 and that trend continues to rise into 2023 (CAA 2022 data).
- Flexibility, including refundable rates and cancellation policies, continues to be one of the top considerations for travellers, particularly those travelling internationally

2. Travel trends

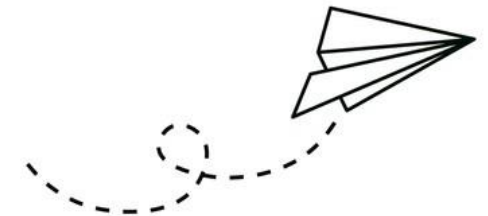
- Recent IPS data demonstrates that inbound travel to the UK from Canada has now exceeded 2019 levels for both visits and spend. Between Jan-Sept 2022 Canadian visitors were up +1% in volume and +18% in value terms compared to the same time period in 2019.
- Canadians' appetite for travel continues to be high, as demonstrated by the Canadian Air Transport Security Authority's data from across 17 large airports across the country. On January 1, the passenger count increased by 82% in comparison to the same date in 2019 — surpassing 2019 levels.
- Canadian visitors stay longer – average 9 nights vs all market average of 7; spend more per visit, compared to the average inbound visitor: £840 vs £696 and great seasonal spread as they travel to the UK year-round.
- Canadian travellers are most interested in a holiday where they can experience coastal places, enjoy local food and beverage specialties, and visit famous or iconic tourist attractions. Exploring history and heritage is another popular interest amongst Canadians. (MIDAS)
- Expedia's research data shows that more than 60% indicate clients are choosing travel options aligned with their personal values such as sustainability, inclusivity, and accessibility.
- “Revenge Travel” is the new term amongst millennials, wherein 62% plan to travel internationally, while 38% plan to travel domestically for their next vacation.
- Main influences inspiring Canadian's next holidays include recommendations by family or friends (in-person and via social media), travel websites found via search and competitive airfare deals. (MIDAS)

3. Consumer sentiment in general on travel

- From VB consumer sentiment research, we know that pent up demand for travelling abroad for leisure amongst Canadians is high. Over three in four Canadians (77%) were likely to take an international leisure trip in the next 12 months; 51% definitely would, and over half (56%) remained open on their destination choice, having not booked or decided where to go.
- While optimism in Canada is high in many respects, there is also a sentiment of caution. 60% of Canadians are concerned about inflation impacting their travel plans within the next 12 months (Travel Pulse).

Flight bookings: Made to the UK from North America

- Since the beginning of 2022, forward bookings have seen a strong rebound from the North America. In February of 2022, Russia's invasion of Ukraine drove a dip that dissipated across March-April and by June, for the first time, bookings exceeded pre-pandemic levels as border restrictions for all air passengers entering the US were relaxed. July and August saw a drop in bookings to lows of -16% and -17% driven by airport disruptions and cancellations across Europe and the cost of living crisis that began to emerge.
- Across September bookings remained relatively stable while October rates move closer to 2019 levels and exceed them in the first week. November bookings slip slightly vs October and further again across December. An unusually strong peak is seen at the end of 2022 as Christmas day/boxing day fall within different comparative weeks.
- Into 2023, forward bookings from North America to UK have seen a strong rebound, exceeding 2019 booking figures for the last 9 consecutive weeks. The most recent week of data (w/c 20th February) bookings recovery has slowed but still up by +9% on the same week in 2019, significantly outperforming the global average.



Source: Forward Keys data up to 5th February 2023. Bookings made in each week starting date shown, vs. those made the same time in 2019. A 2-year growth is shown to compare against a 2019 baseline rather than comparing against the early part of the pandemic era in 2020 or 2021.

Travel Trade Trends - North America

Biggest trends in hospitality

- Multi-generational travel to celebrate occasions (which we can expect to see leading up the Coronation) – *Making Memories*
- Research-led approach when it comes to choosing a product, especially luxury (eg. Sustainable)
- Growing desire for travellers to participate in private tours and boutique group trips
- Bleisure: work trip that adds a vacation component (combining business and leisure, but not committing to one)
- Off season travel to avoid high costs

Smaller or more emerging/niche trends

- Community travel / Support local: spending time with locals, engaging in activities, food & drink, sharing their homes
- Slow travel
- Storyfication: travel to film locations, set-jetting
- Workations: vacation that adds a work component (shift from Bleisure)
- Sobriety-seeking travellers and booze-free hospitality
- Rebel spending – high-earned with savings splashing cash on luxury experiences/accommodations, like yacht, jets, estate rentals

Marketing to the Travel Industry & Consumers

- GWW to represent you collectively at VisitBritain Overseas Events, such as
 - ExploreGB Virtual
 - Destination Britain North America etc.
- Independently be active on the internet and social media
 - www.
 - LinkedIn
 - Instagram
 - Facebook
 - Bring your story to life with Photo's & Video, especially
 - Driver Guides & Guiding Services
- Niche specialist topic including North American links?
 - Research special interest tour operators & travel advisors; University Alumni groups etc.
 - Call, E-mail, Web – drive inquiries to your social channels for photographs
- Promote yourself to the UK based Destination Management Companies
- Local DMO Events, eg: Visit Wiltshire, Visit West etc.



Key Trade Resources

Find the latest information and all the inspiration you need to help your clients book their next trip to Great Britain!



VisitBritain Corporate Website

See the latest insights, market updates, events and industry opportunities at www.visitbritain.org



VisitBritain Trade Resources

Sign up to our trade newsletter, go to <https://www.visitbritain.org/tools-and-resources-international-travel-trade>



VisitBritain Consumer Website

Find inspiration including articles, holiday ideas and what's hot right on our consumer website www.visitbritain.com



Travefy Itinerary Tool

Travefy is a digital platform helping travel professionals create custom itineraries. For Great Britain itinerary inspiration, go to: travefy.com/website/yajq26axtajx6nrra4jv6n-6wtar32q2ta74 or [click here](#)



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Need to know

	Date:	21 Jun 2023 to 1 Dec 2023
	Booking deadline:	Friday, 31 March, 2023

Contact details

	Flavia Messina
	Email
Website:	 Register interest



Events Programme

<https://www.visitbritain.org/node/125175>



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