UKinbound Annual Convention, Belfast
North American Market
21 September 2023

Mother and children walking towards the sea on the horizon on a summer's day in Norfolk. ©Getty Images/Ezra Bailey

VISIT BRITAIN

VisitEngland

Agenda

- Introduction
- About the North American Market
- Our Work in North America
- Market Insights / Tips For Growing Your North American Business
- How to Get Involved

Image: Woman walking in Blenheim Palace gardens surrounded by greenery, Woodstock, Oxfordshire, England. ©VisitBritain/Marina Comes

The North American Travel Market

North America's importance to the UK visitor economy

North America is the only global region to have recovered to pre-pandemic levels by UK visits and spend in 2022

- **5.5 million visits** to the UK, exceeding pre-COVID volume by **+2%**
- 18% of total UK inbound volume

- Record of **£6.9bn in visitor spend,** exceeding pre-COVID value by **+40%**
- 26% of total UK inbound visitor spending. **£1 in every £4 was spent by a North American in 2022**.

Growth continues: Q1 2023 volume and value records hit

The USA remains the UK's the **largest and most value** international tourism market

USA is a key driver of global travel recovery with total outbound and European travel exceeding 2019 levels by in December 2022.

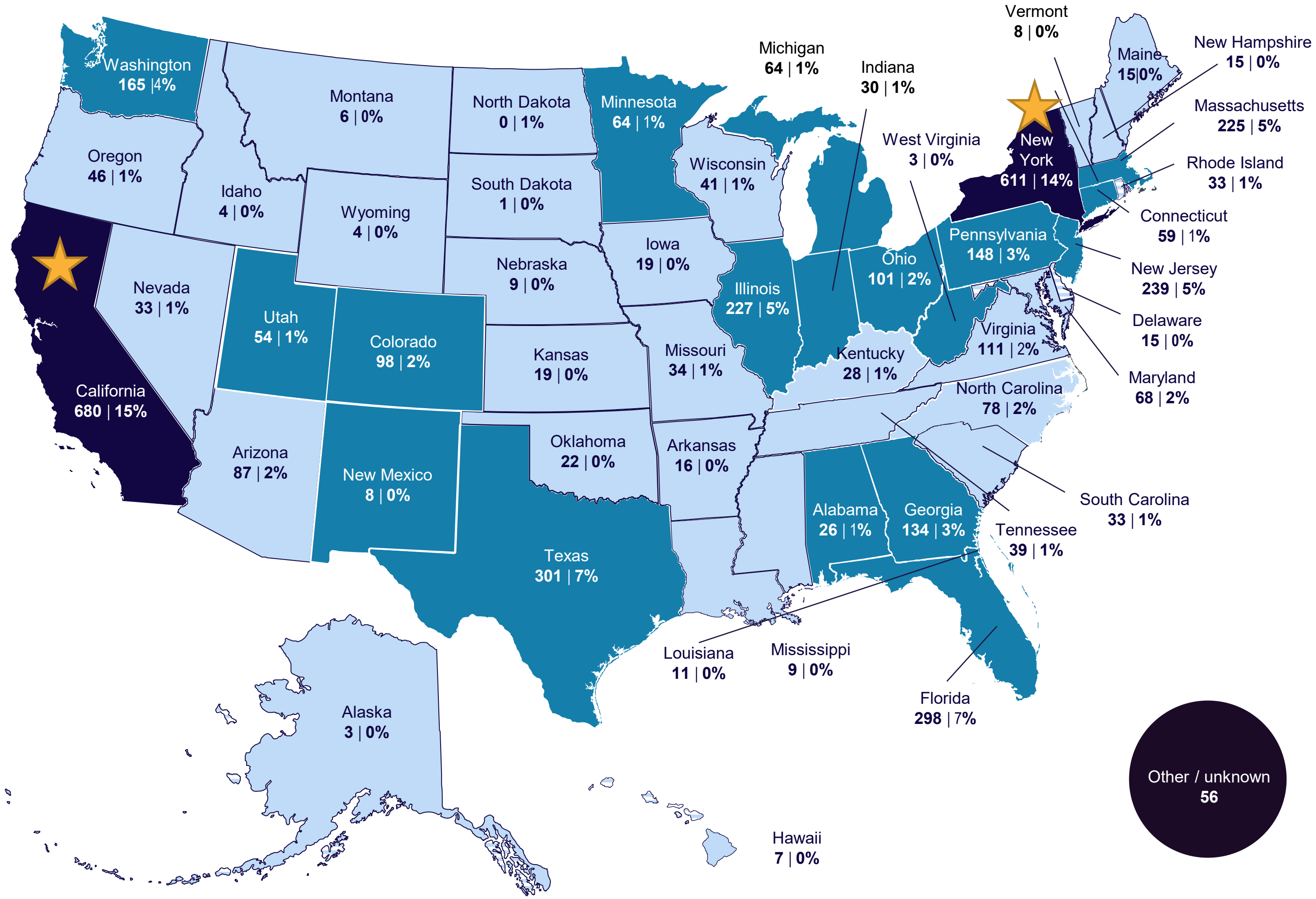
Source: International Passenger Survey by ONS, 2022 and 2019. All spend is stated in nominal terms, Oxford Economics, ETC Long-Haul travel Barometer.

1 in 3 US arrivals are from California or Tri-state area

Top US Source Markets:

#1 Tri-State area – 909,000 (20%)
#2 California - 680,000 (15%)
#3 Texas - 301,000 (7%)
#4 Florida - 298,000 (7%)
#5 Los Angeles - 261,000 (6%)

1 in 5 US visitors to the UK are residents of the New York Tri-State* area



Visits in 000s | % share of visits

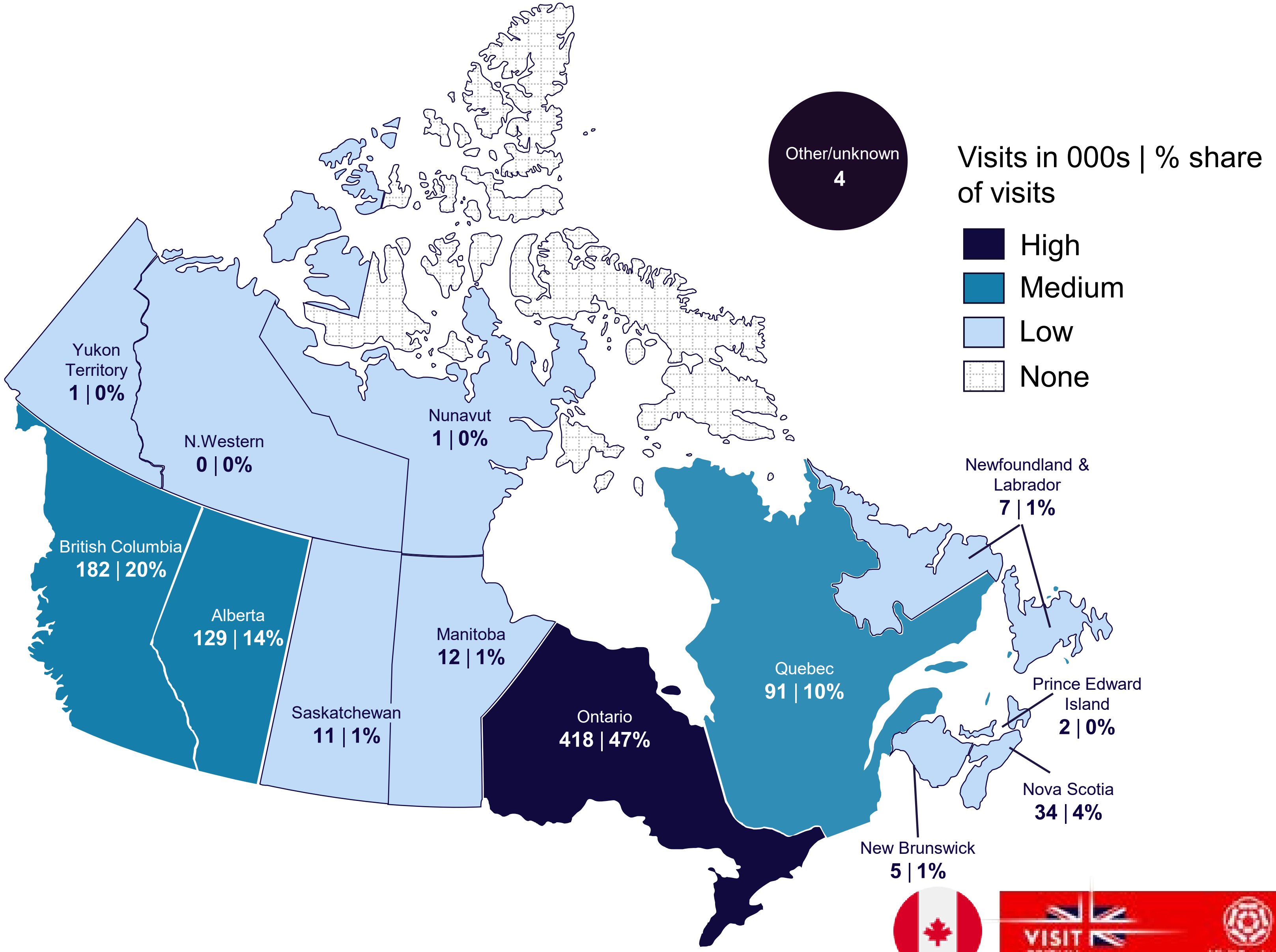
- High
- Medium
- Low
- None

Source: International Passenger Survey by ONS 2019 * includes New York, New Jersey and Connecticut

1 in 3 Canadian arrivals are from British Columbia and Alberta

Visits to the UK (2022)

- The largest proportion of Canadian visitors who came to the UK reside in **Ontario** (47%) and **British Columbia** (20%). These two states generate 67% of all inbound visits from Canada.
- **Alberta** represented 14% and **Quebec** represented 10% of Canadian inbound flow to the UK in 2019.



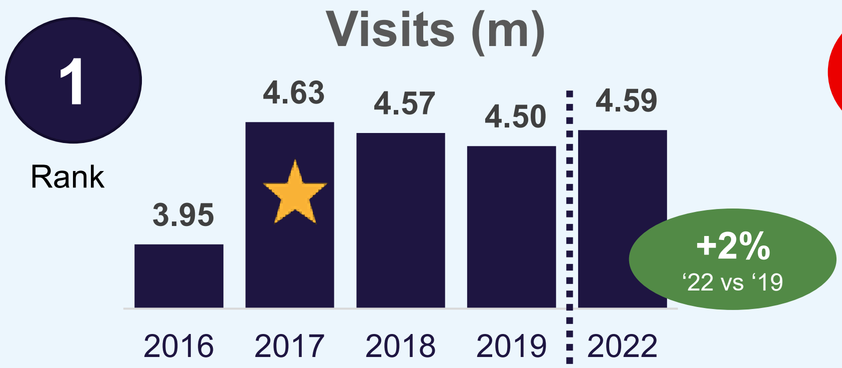
Source: International Passenger Survey by ONS, 2022

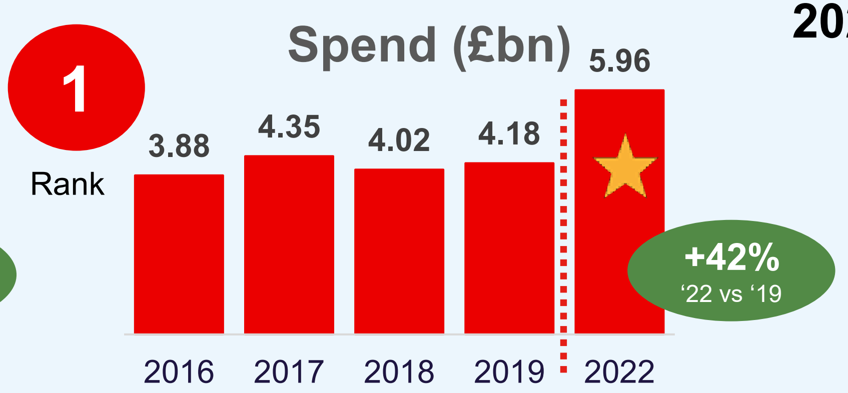
The USA Traveller Profile

In 2022 **American visitors stayed longer and spent more in the UK**

Almost half visited for **holidays** with peak visits **in summer and spring time**

2022





Trip Purpose

48%	29%	13%	9%	1%
Holiday	VFR	Business	Misc.	Study

Seasonality

8%	29%	39%	24%
Jan-Mar	Apr-Jun	Jul-Sep	Oct-Dec

Nights per visit

All visits: 9

Holidays: 7

Global Average: 8

Spend per visit

All visits: £1,300

Holidays: £1,431

Global Average: £848

Spend per night

All visits: £152

Holidays: £202

Global Average: £101

Source: International Passenger Survey by ONS, 2022 or for other years as stated. Spend is stated in nominal terms.

Records are marked with a star

The Canadian Traveller Profile

In 2022 **Canadians stayed longer and spent more in the UK**

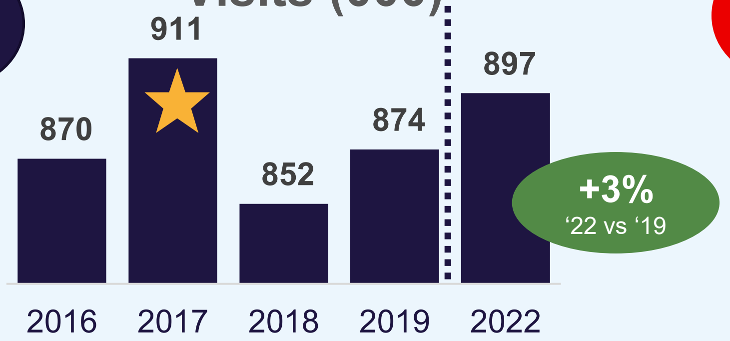
VFR overtook holidays to become most popular trip purpose with total visits peaking in summer

2022

9

Rank

Visits (000)



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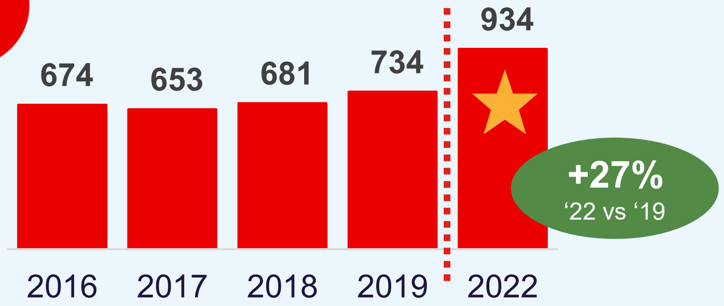
Rank

Spend (£m)



Trip Purpose

VFR	Holiday	Business	Misc.	Study
47%	37%	7%	8%	1%

Seasonality

Jan-Mar	Apr-Jun	Jul-Sep	Oct-Dec
6%	30%	41%	22%

Nights per visit

All visits: 11

Holidays: 9

Global Average: 8

Spend per visit

All visits: £1,042

Holidays: £1,269

Global Average: £848

Spend per night

All visits: £97

Holidays: £147

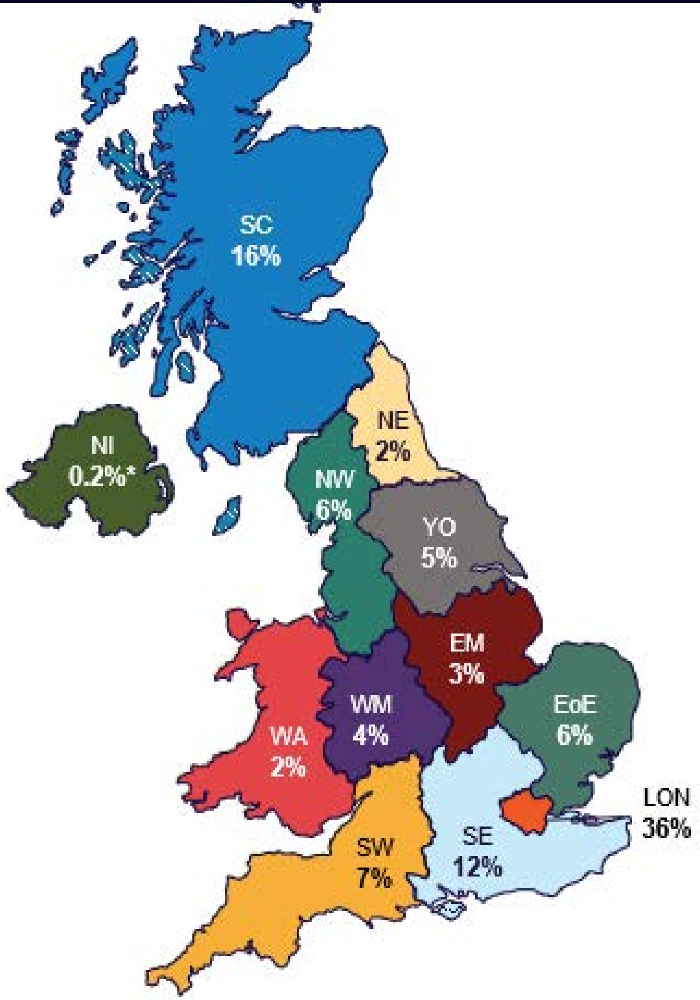
Global Average: £101

Source: International Passenger Survey by ONS, 2022 or for other years as stated. Spend is stated in nominal terms.

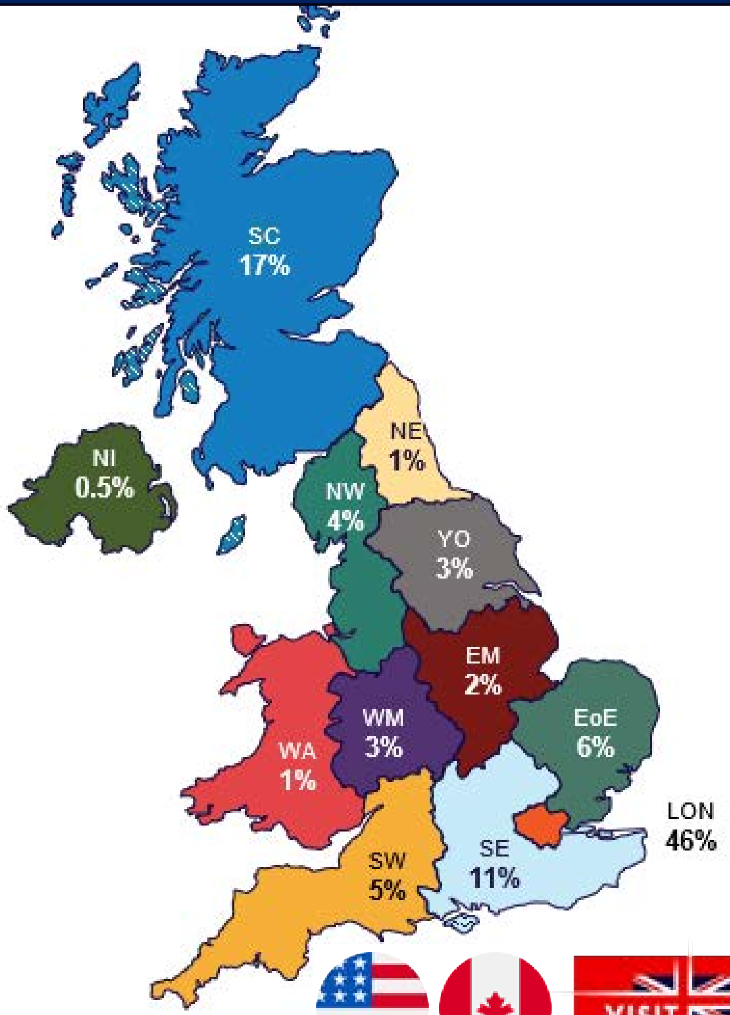
Records are marked with a star

The North American Regional Spread

Where do Canadians go?



Where do Americans go?



Source: International Passenger Survey by ONS, 2022 or for other years as stated. Spend is stated in nominal terms.

What We Are Doing in the Markets

VISIT BRITAIN

VisitEngland

GREAT US/Canada Brand Solus Campaign Snapshot

FAKE (BR)IT TILL YOU MAKE IT

People think all Brits sound very posh. Like Hugh Grant or Prince William.

But there's so much more to Britain. In fact, we have the highest density of different accents in the world and with each one comes a different, exciting place to discover.

So we're going to create a fun online game that challenges Americans to impersonate lots of different British accents.

Playing is easy. You'll be shown videos of real British people saying warm greetings from different parts of Britain. You'll then be asked to impersonate what they just said. Your Impressions will be judged and you'll be signposted to discover more about that region through the VisitBritain website.

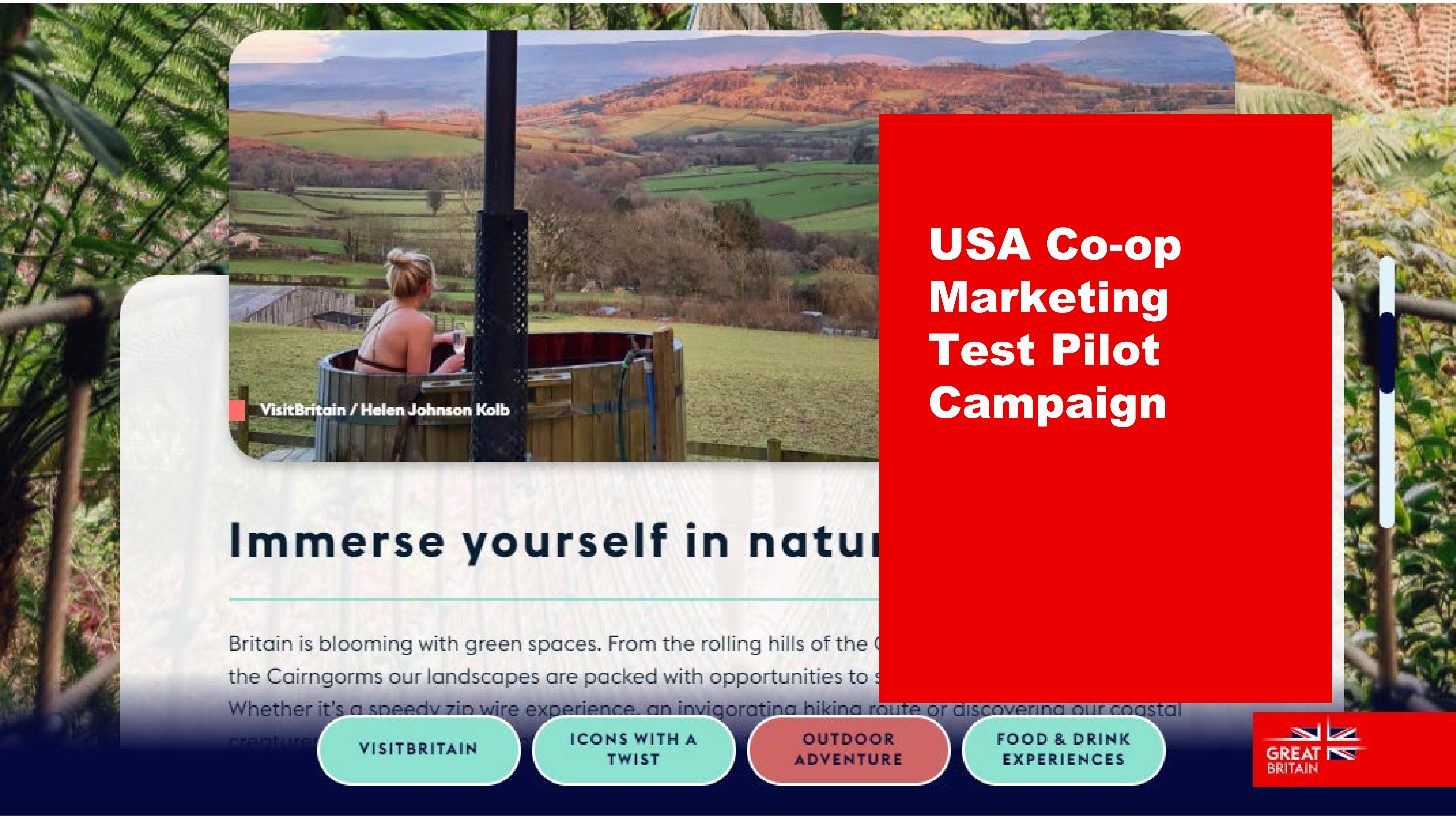
It'll be a funny challenge. Brits and Americans may both speak English, but some British accents sound like another language!

So get ready to discover just how wonderfully rich and varied Britain really is.

VISIT BRITAIN VisitEngland

Fake Br(it) Till You Make It

USA Co-op Marketing Test Pilot Campaign



GREAT BRITAIN

Co-Op Marketing Test Pilot 2023

Budget	• **Total Campaign Value: £575k** • ***(VisitBritain: £250K + 15 Partners £325K)***
Objective	• **Pilot program to support industry by leveraging VB media partnerships providing a collaborative campaign platform for industry partners to buy into.**
Phase 1 *(Awareness/Push)*	• **VB-ONLY: Mar 9-31, 2023** • **VB Seed Funding: £250K**
Phase 2 *(Convert/Pull)*	• **PARTNERS: Apr-May 2023** • **15 Partners contributed: £325K**
Brand Platform	• **Come See Things Differently** • **Themes: Icons w/a Twist, Outdoor Adventure, Food & Drink Experiences**
Overall Performance	• **Revenue & Partners:** exceeded goals on revenue (£325k v. £200k) & partners (15 v. 12) • **Media**: exceeded all targets: 54+M impressions, 53K+ clicks, 932k interactions. • **Economic Impact:** The campaign drove 3,000+ travellers at an average spend of £1,300 (IPS) = circa GB£4M (circa US$5M). *(Source: Sojern)*

VISIT BRITAIN VisitEngland

US Coop Test Investment - £574K
VisitBritain: £250K + 15 Partners: £325K (130%)

GLOBUS

Hilton

Glasgow life

Historic Royal Palaces

visitBrighton

Visit Wales
Croeso Cymru

West Midlands
Growth Company

Aer Lingus

ENGLISH HERITAGE

CIE C·I·E TOURS

KENT
GARDEN of ENGLAND

ABBA Voyage

ROALD DAHL'S
Matilda
THE MUSICAL

WIZARDING WORLD

Harry Potter

VISIT BRITAIN
VisitEngland

Co-Op Creative Examples

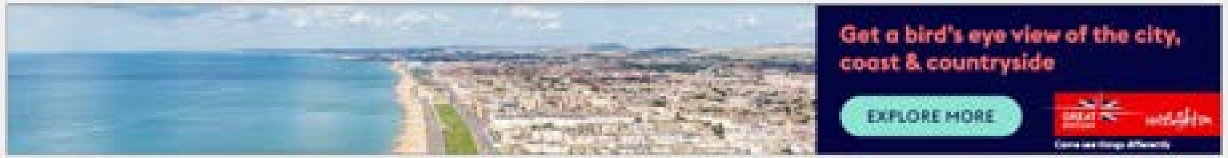
VisitBritain – Visit Brighton

Retarget ads

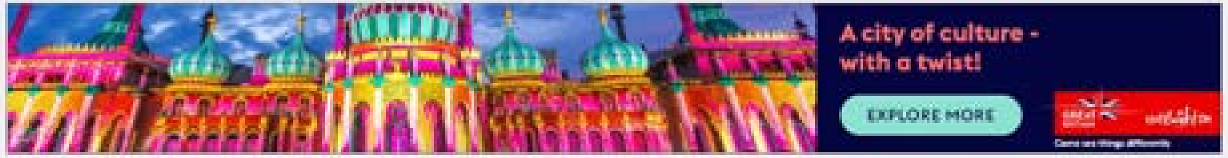
300x250

Frame 1

Frame 2



Frame 1



Frame 2

VisitBritain – CIE Tours

Retarget ads

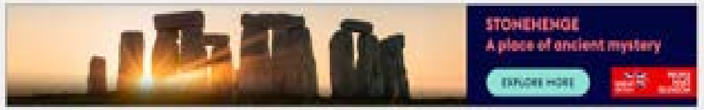
300x250

Frame 2

VisitBritain – English Heritage

Retarget ads

728x90



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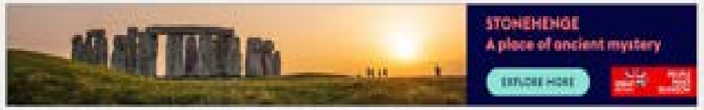

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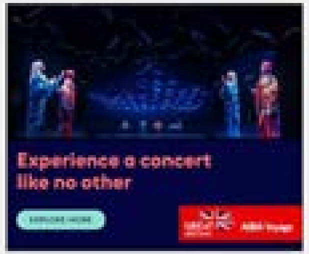


Frame 1

Frame 2

VISIT BRITAIN VisitEngland

Co-Op Marketing Test Pilot Campaign


GREAT
BRITAIN

B2B Strategy

ORGANISATION VISION: By 2025 the BTA will have transformed into an influential global organisation leading a common agenda Government and industry to grow a sustainable future for the visitor economy

ORGANISATION ROLE: OUR ROLE: To drive immediate tourism recovery by building back visitor spend as quickly as possible and supporting the industry

B2B Vision: to enable the UK tourism industry to grow the value of international visits in a sustainable way

1) Support for UK industry

A mix of self service, webinars, workshops and low-cost opportunities that provide economies of time/effort and a route to market

Focus: 100% existing product

2) Sales resources & training for international trade

A mix of self service information, sales & marketing toolkits and a destination training programme

Focus: 50/50 existing v new product

3) B2B Events Programme

An improved programme of events that is tailored to the needs of the UK industry, reflecting the importance of virtual and f2f meetings

Focus: 50/50 existing v new product

4) Focused Account Management

An upskilled & focused KAM team that can prioritise direct engagement with best prospects on the supply and demand creation using e-crm to extend reach and influence

Focus: 50/50 existing v new product

5) Growth Partnerships

Criteria driven partner campaigns that leverage resources & marketing funds of key intermediaries to develop, contract and promote new/extended regional programmes

100% new product

Underpinned by a 'Britain Destination Growth Framework' – an agreed roadmap with strategic partners of priorities for responsible growth across seasonal & regional spread, spend and sustainability

Enablers: CRM system, new industry website and training platform

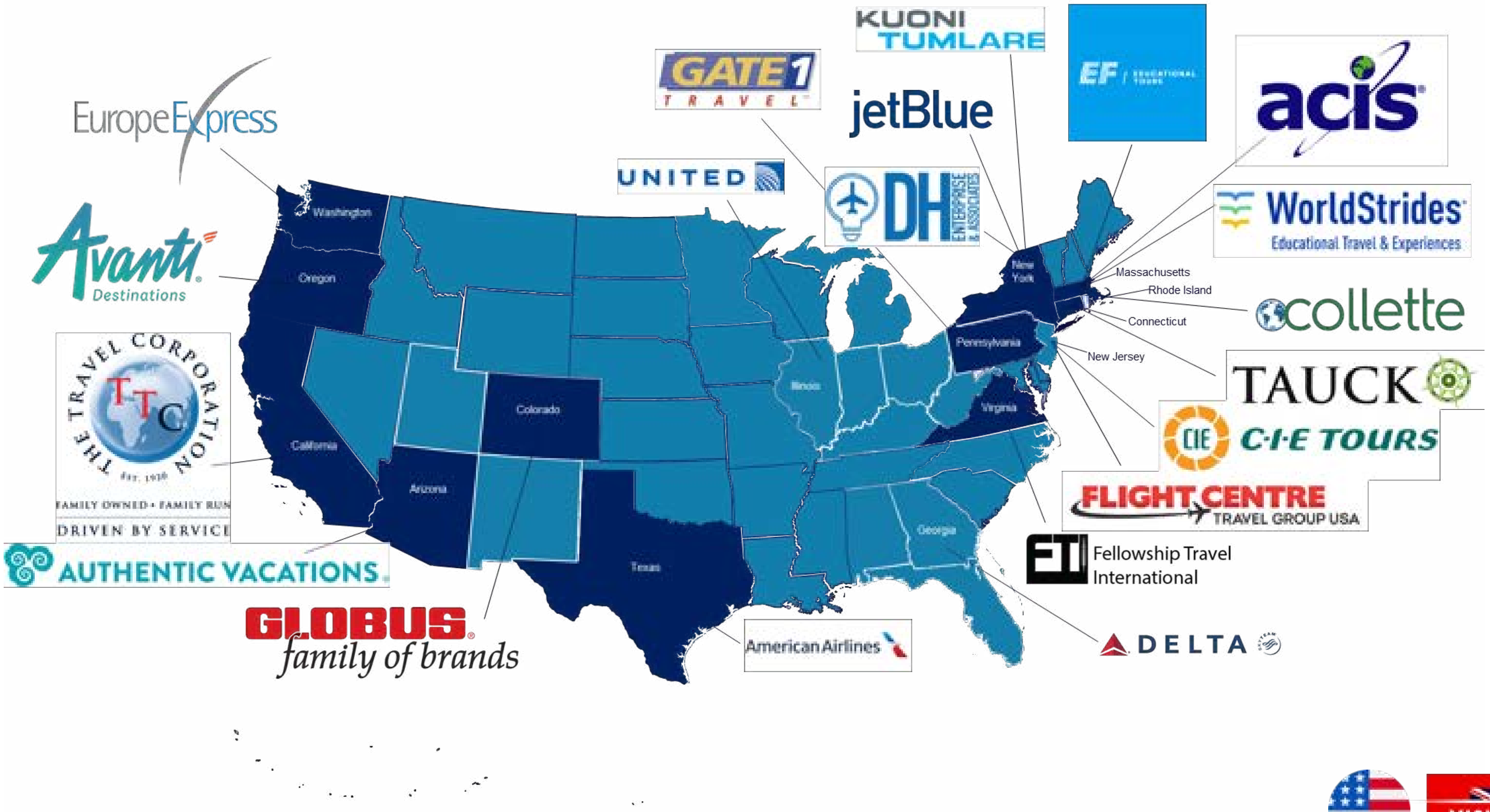
Strategy dependencies:

Demand-Building Strategy, Stakeholder Strategy, Content Strategy

Travel Trade Landscape – USA

Travel Agency Groups	Key Tour Operators	Online Travel Agents	Wholesalers/Aggregators
Flight Centre Travel Group	The Travel Corporation	Booking.com	hotelbeds
Travel Leaders Network	Globus family of brands	Expedia	trivago
Virtuoso	Avanti Destinations	KAYAK	
Signature Travel Network	Authentic Vacations.com	Tripadvisor	
	Costco travel		

Top USA Account Locations



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VisitEngland

Travel Trade Landscape – Canada

Travel Agency Groups	Key Tour Operators	Airlines
Travel Leaders Network	The Travel Corporation (TTC) – Family owned • Family run – Driven by service	Air Canada
Virtuoso – Specialists in the art of travel	Goway	British Airways
ensemble	RIT	transat
Flight Centre Travel Group	Globus family of brands	WestJet
Trevello	TravelBrands	
	Kensington Tours	

Canada Key Trade Account Locations

BA X VB Partnership: Ask Britain Anything

The objective of the campaign is to change perceptions of Britain and get Experience Seekers to choose Britain as their next overseas trip in 2023 and book on British Airways.

The USA has always been curious about British culture, but beneath the stereotypes – how well do they *truly* know us? We've taken 50 of Americans' most searched questions about the UK: from meaningful to light-hearted. Then we interviewed real Brits to answer them – with authenticity that sheds light on who we truly are. The results will challenge stereotypes – showing a Britain that's more vibrant, diverse & welcoming than the world realises.

EST. LIVE DATES
Q4: w/c 13th March – 21st of April
*Possible Q1 extension

TOTAL INVESTMENT
£3.816M (VB £1.908M + BA £1.908M)

KPIs
Consideration: CTR, VCR, time spent, ER, bounce rate & cost per qualified visit
Conversion: Looks & bookings on ba.com

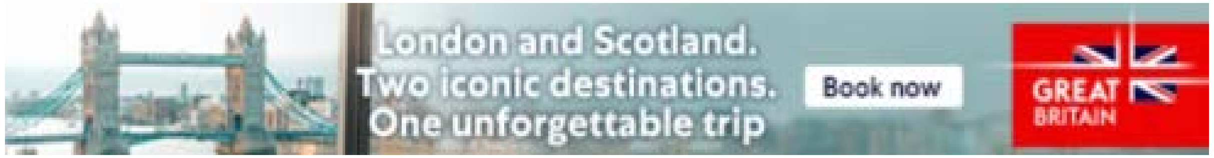
CHANNELS
Social (IG/FB), digital video & display (The Trade Desk), CTV (Disney + / TrueX), and a custom content partnership (DotDash Meredith).

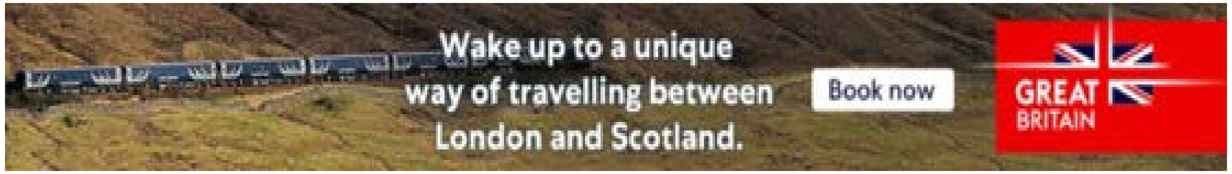
London & Partners Gateway Innovation Fund

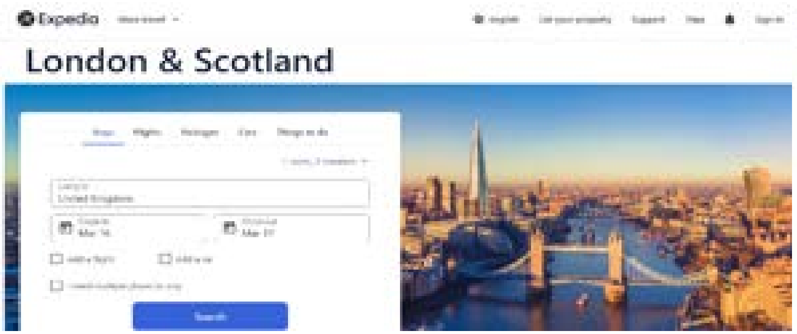
Objective: Drive incremental consideration and international spend to London and Scotland in a single trip.

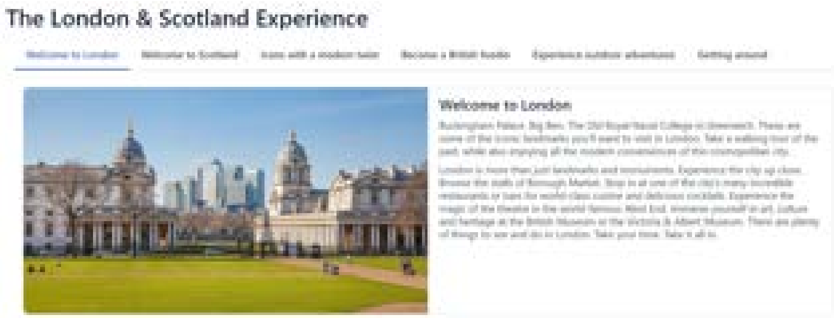
Partners: Expedia, LGW, Caledonian Sleeper, VisitScotland, Scottish DMOs including Glasgow, Edinburgh, Inverness, Aberdeen and Aberdeenshire.

Live dates: 3 March – 12 May 2023
Investment: £773K (£397k Cash / £376k MIK)









PR & Communications

Taking a proactive, targeted approach to media engagement

- Increased focus on top-tier media outlets aligned with high-value Experience Seeker audience
- Closer collaboration with Central PR team to leverage KAM engagement
- Redefining Influencer strategy
- Team returning to full-strength

Press Visits

- Recruiting media for group trips organized centrally (x3)
- Americas regional trips (x2)
- Budget for 6-8 fully hosted individual trips
- Limited budget for partial assist
- Recruiting media for trips hosted by Visit Wales

Desksides

- Renewed engagement plan for New York City-based media
- In-person engagement in key markets including Los Angeles, Miami, Chicago and Washington, DC

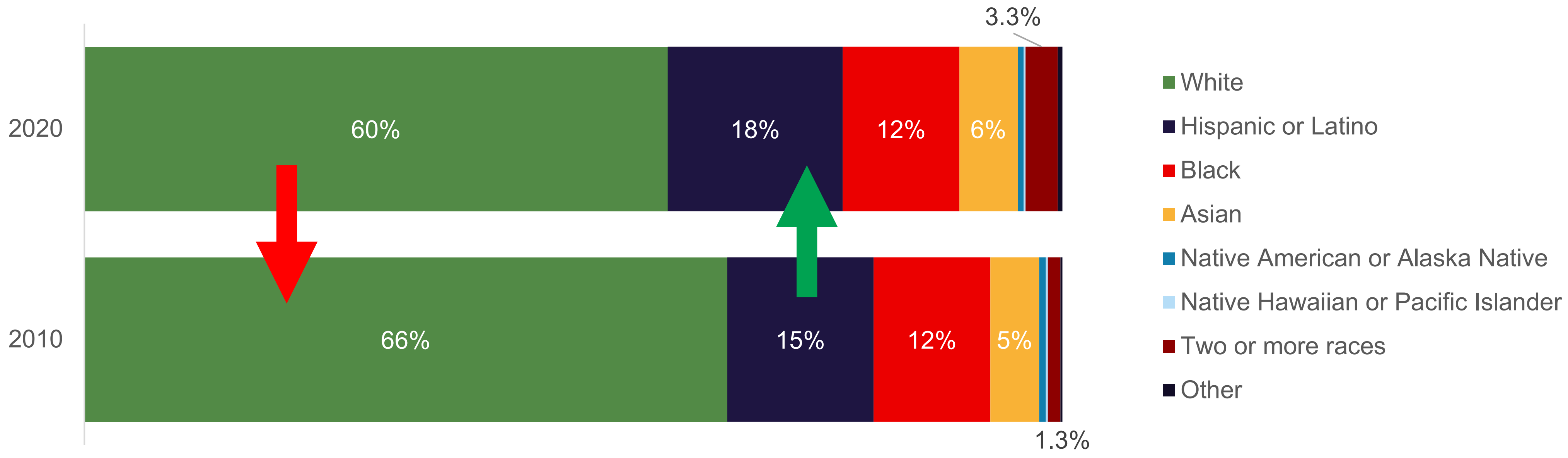
Strategic Partnerships

- Collaboration in-destination and in-market with VisitScotland, Visit Wales, London & Partners
- PDP
- External partners (suppliers in destination, PR reps in market)

Market Insights / Tips For Growing Your North American Business

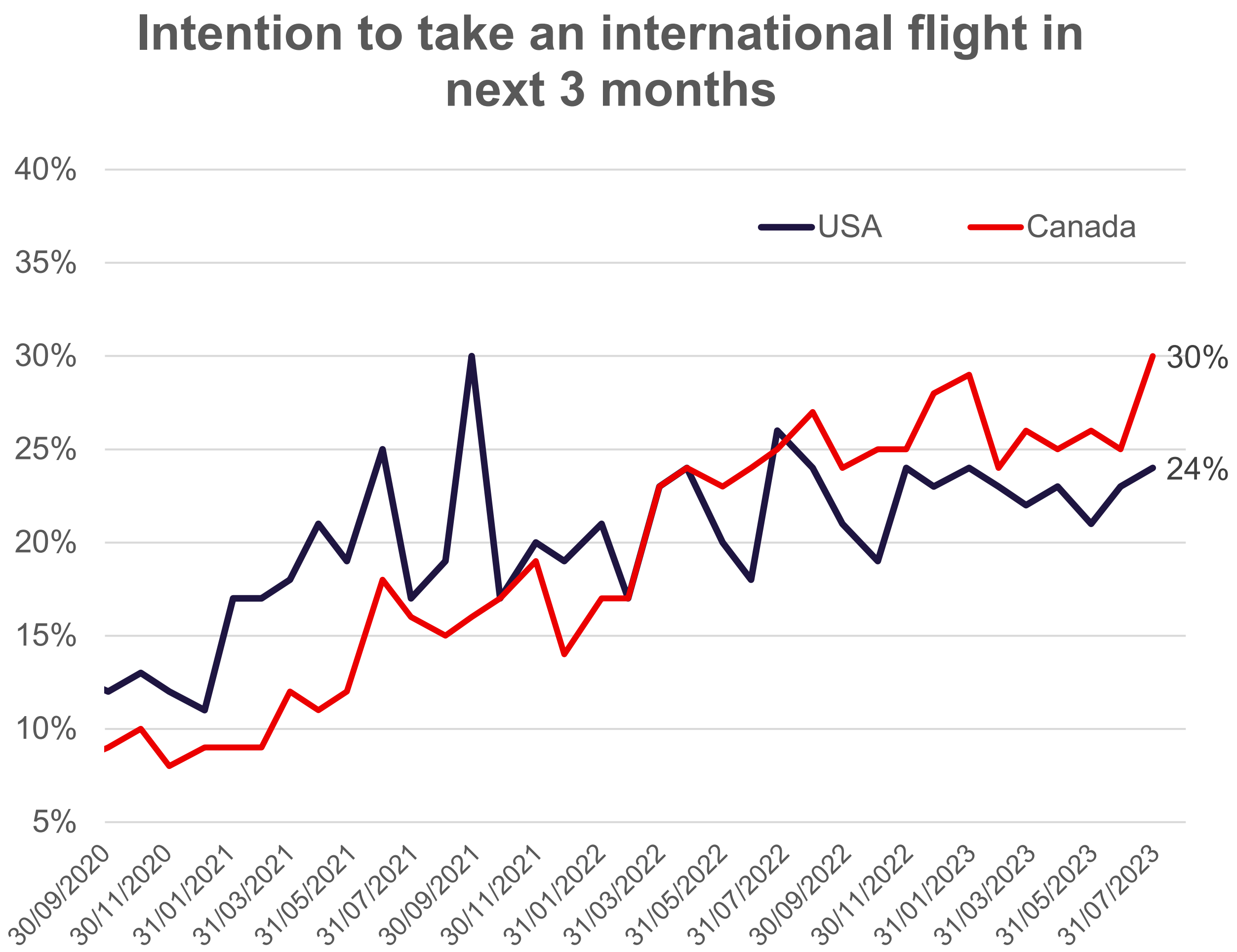
North America is more diverse and multiracial than ever before

- The US has experienced **unprecedented multiracial population growth and a decline in the white population for the first time in the nation's history.** The share of those who identified as Hispanic or Latino or as multiracial grew the most.
- **Under-18 population is rapidly diversifying**. Non-White US residents under 18 now make up 53% of the population, up from 47%.



Source: US Census 2020

North American travel sentiment driven by younger and high income traveller segments



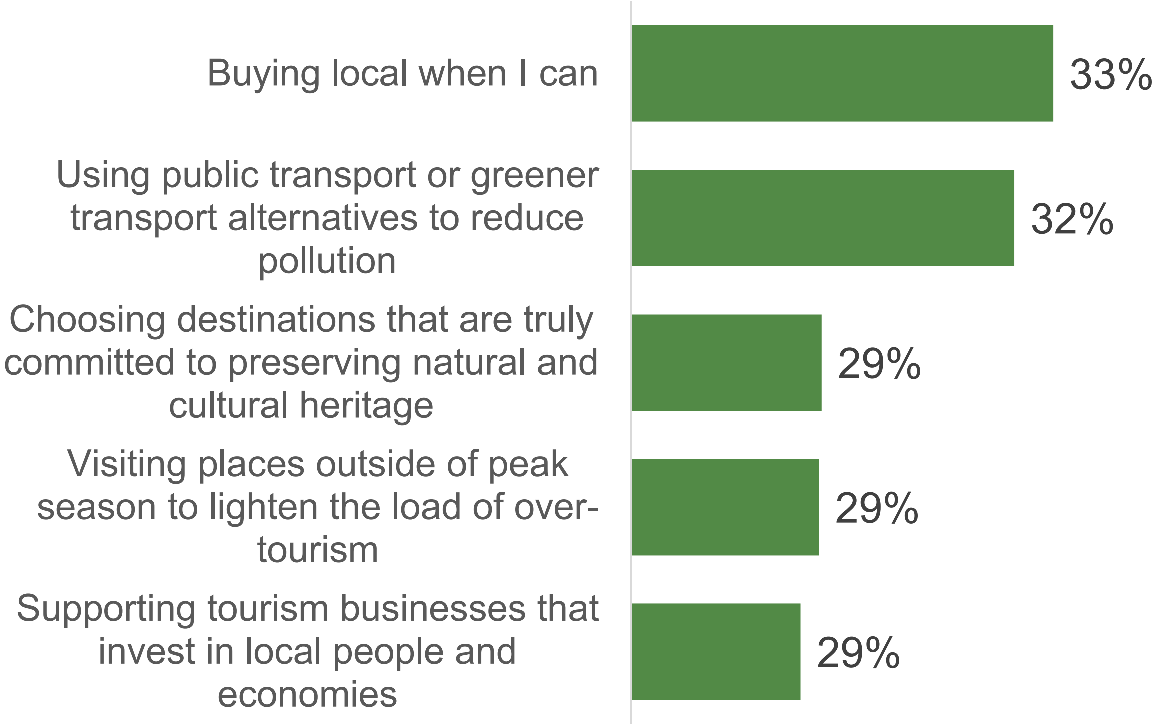
- Overall sentiment for North American international travel has **steadily grown** since the pandemic.
- Almost **1 in 4 American's** and **1 in 3 Canadians** intend to take an international flight in the next 3 months.
- Those **aged 18-34** have strongest intention to travel internationally
- Those within the **higher income** brackets are also driving travel sentiment

Source: Deloitte Global State of the Consumer Tracker

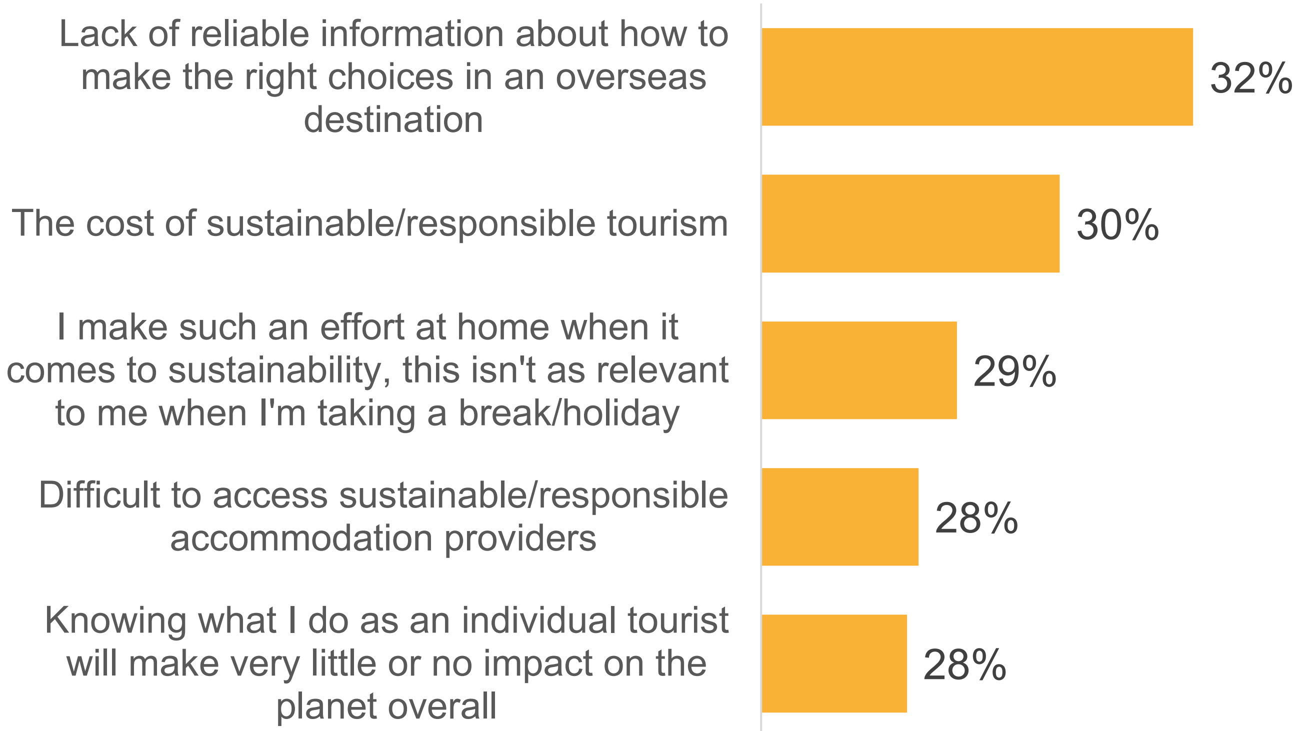
North American visitor views on sustainability

Visitors from North America are willing to make sustainable choices when reliably informed on how to do so, and when these choices don't come with a high personal cost

Sustainable choices already taken by previous NA visitors to Britain



Barriers to adoption among previous NA visitors to Britain



Source: VisitBritain/Kubi Kalloo MIDAS research project published June 2022. Base visitors to Britain in the past 5 years.

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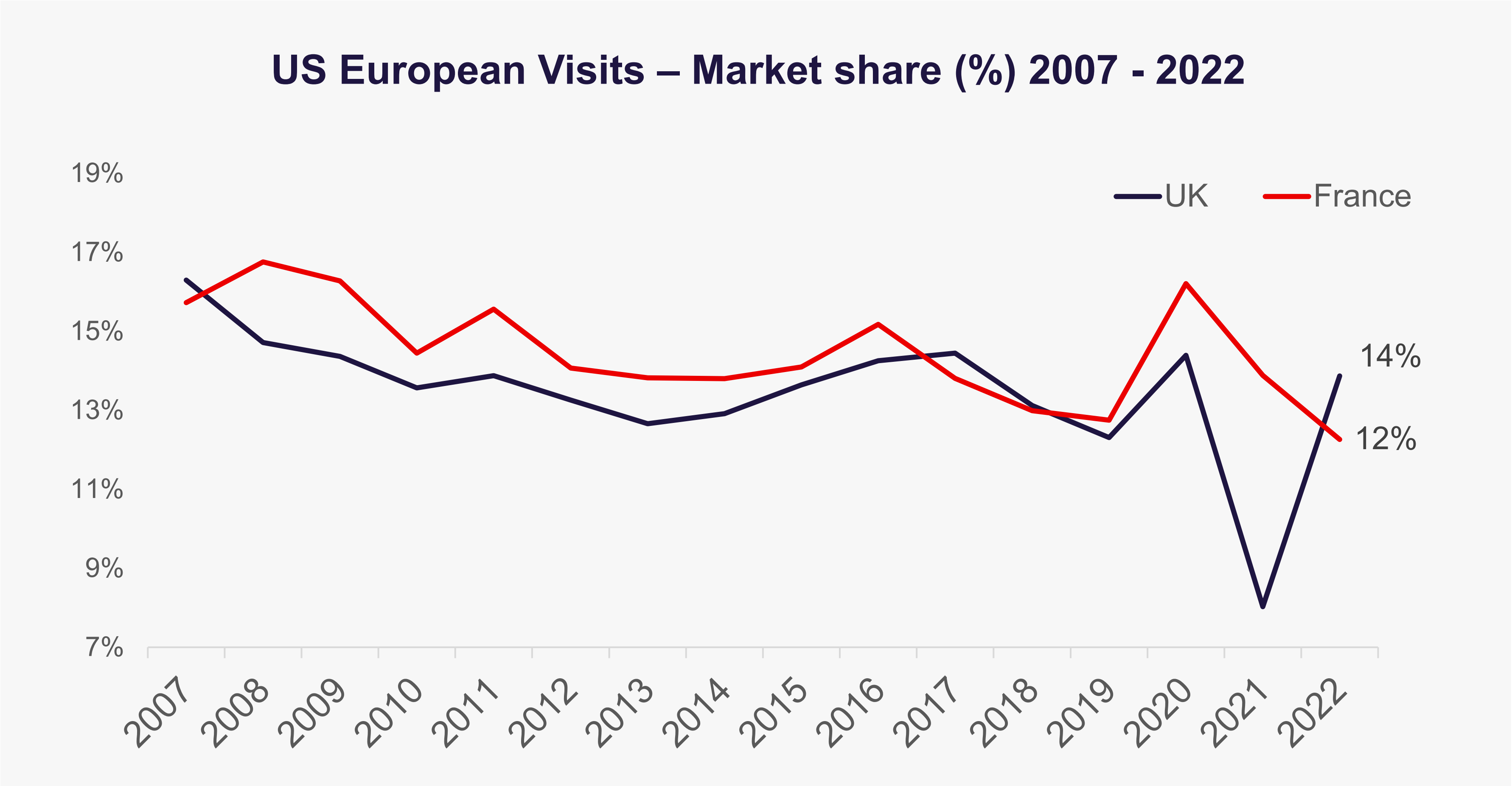
The UK regains European lead amongst US travellers

According to Oxford Economics, the UK became **#1 most visited European market** for Americans in 2022, representing 14% share of US European inbound visits, overtaking France for the first time since 2017.



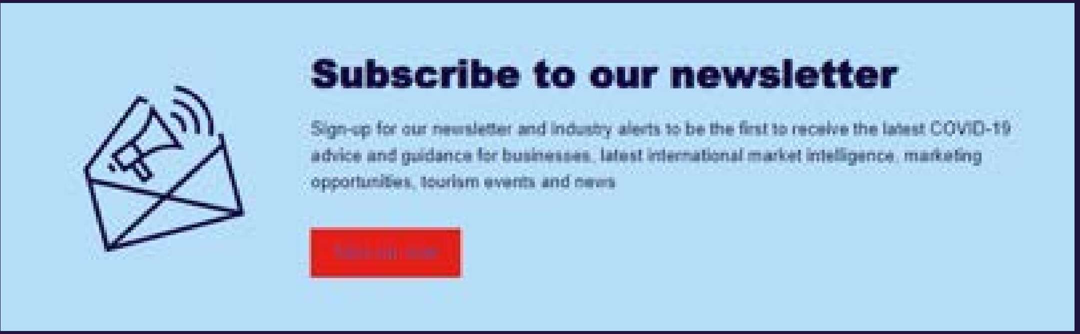
Source: Oxford Economics. 2022 based on estimates.

How to Get Involved

International
UK Trade support
Stuart.heath@visitbritain.org
Flavia.messina@visitbritain.org
Laura.Capraro@visitbritain.org

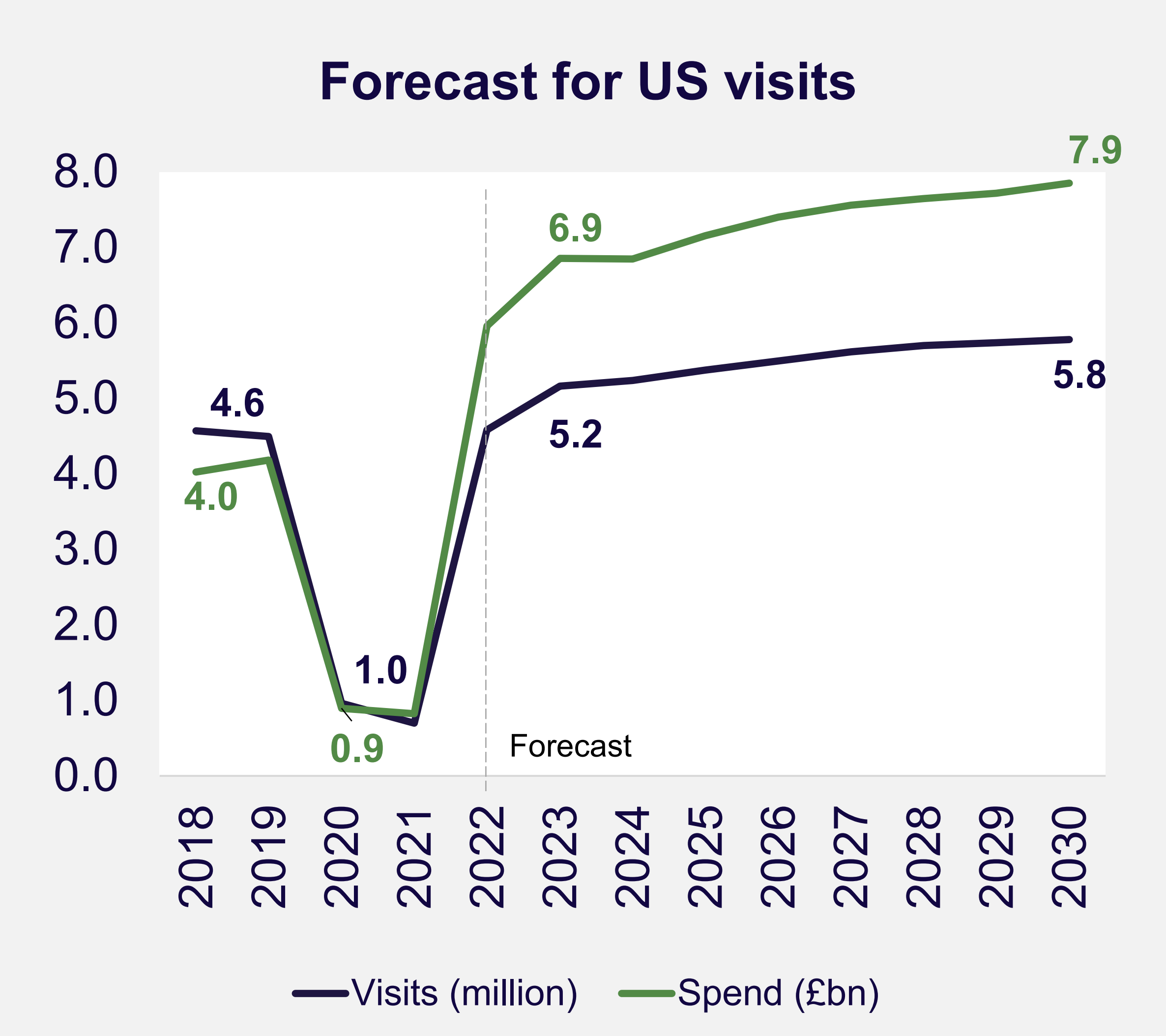
Domestic
Business support
Vicky.Parr@visitbritain.org

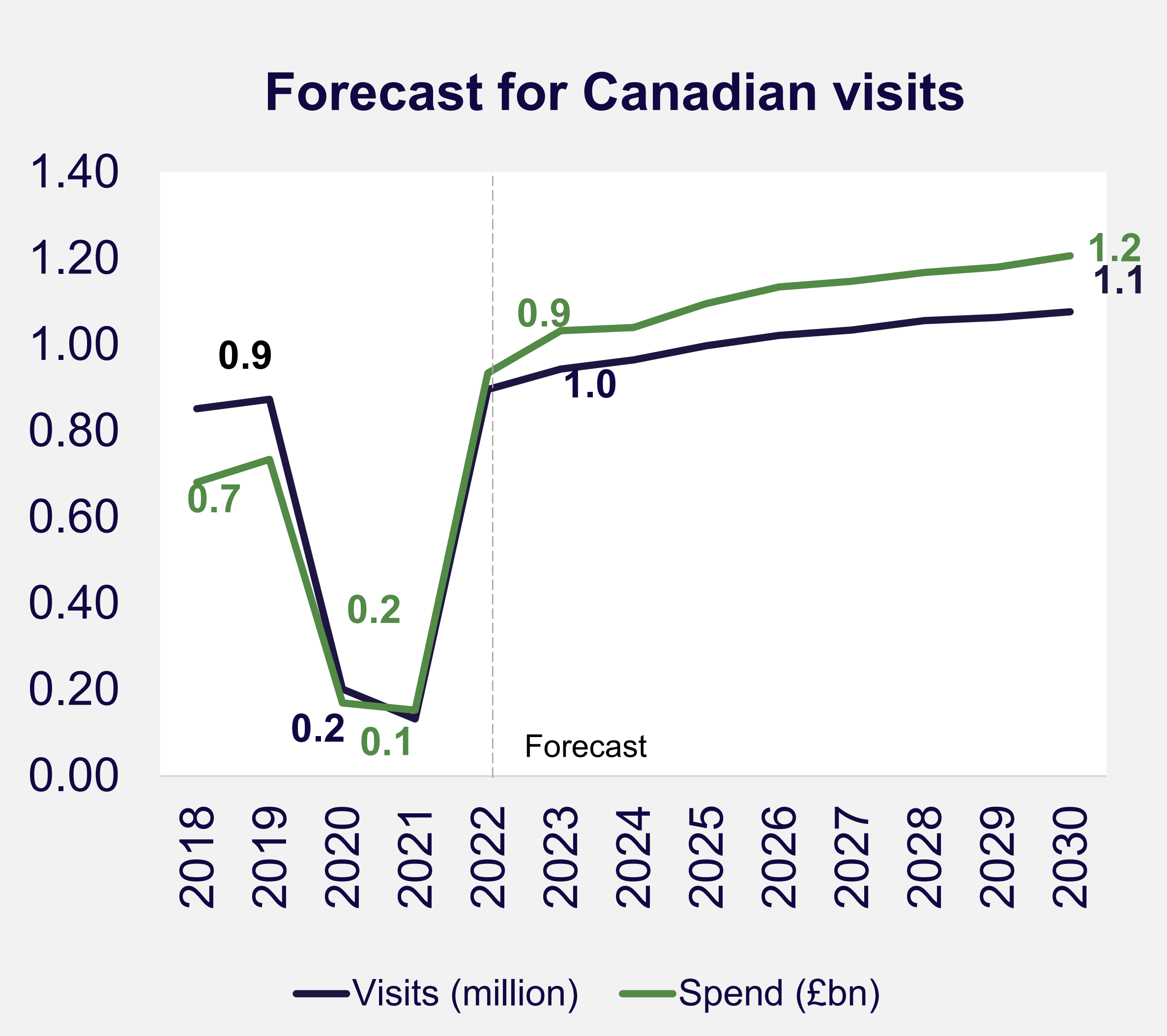
Overseas teams
visitbritain.org/meet-our-international-travel-trade-teams



Appendix

Future Focus – visits and spend to the UK





Source: : International Passenger Survey by ONS, Forecast run June 2023 based on Oxford Economics/VisitBritain; forecasts are reviewed regularly due to ongoing volatility

Perceptions of Britain amongst North Americans

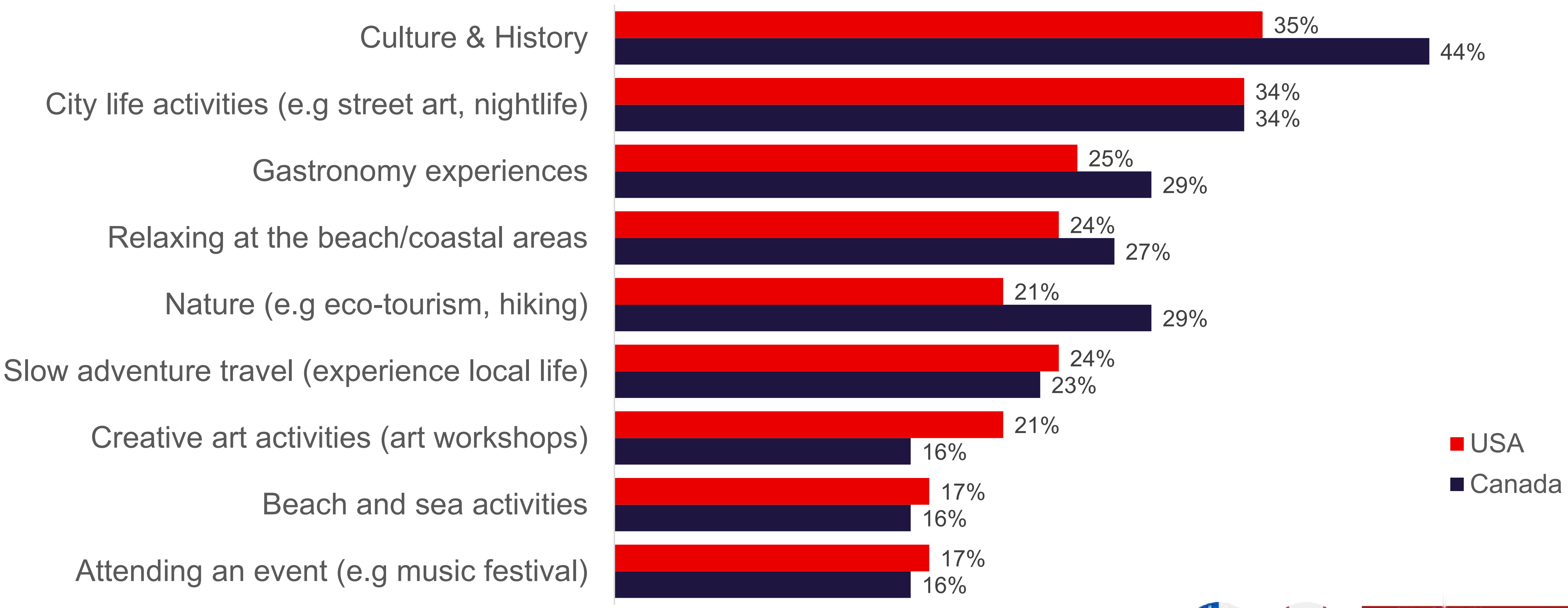
Perceptions of Britain	Associations with Britain		
	GLOBAL Rank	USA Rank	Canada Rank
Is a place where I can explore history and heritage	1	1	1
There are vibrant towns and cities to explore	2	2	4
I can roam around visiting many types of places	3	6	5
Is a mixture of old and new	4	3	2
Is good for seeing famous sites, places, ticking off the 'must do' list	5	4	3
It's easy to get around once there	6	9	11
Offers a lot of different experiences in one destination	7	7	6
Has an interesting mix of cultures from around the world	8	10	8
Is inclusive and accessible for visitors like me	9	5	9
Is a welcoming place to visit	10	8	7

- **Britain's perceived strengths** include history and heritage, mixture of old and new, sightseeing and vibrant towns and cities.
- **Welcome**, the key motivator for destinations, fairing well in the perception rankings
- **Offering good value for money** was ranked one of the weakest perceptions of Britain.

Sources: VisitBritain/Kubi Kalloo June 2022. Core compset include France, Germany, Ireland and Italy.

Culture and History are key interests amongst North Americans

Most sort after activities on European trips - 2023



Source: ETC Long-Haul travel Barometer – May 2023

Creative overview – ‘Fake (Br)it Till You Make It’ Brand Solus Campaign

- Highlighted the richness of Britain’s regional diversity with a variety of local phrases laid over destination images from across Britain and videos with local accents and dialects welcoming visitors and promoting their destinations, encouraging visitors to come and explore for themselves

- The creative pulled on the fact we have the highest density of different accents in the world and that with each one comes a different, exciting place, to visit, by creating an online game on VisitBritain’s consumer website, using machine learning we invited Americans and Canadians to impersonate a selection of regional accents (Scouse, Geordie, Glaswegian, Welsh and Essex) once they had played we invited them to learn more about the region with links to destination information to drive bookings and share their attempts on social with the hashtag #fakebritchallenge.

- The campaign was live across multiple paid media channels including online video, connected TV, influencer activations, programmatic, social, audio and digital display and was amplified through a range of partnerships including a global content partnership with Matador Network that includes global influencer activation and media partnership with Conde Nast.

Owned & Earned Results
Fake Brit Till Make it (US & CA)

Owned and earned content supported the destinations featured in the Fake Brit game, as well as experiences that help visitors see Britain differently. This resulted in top tier media coverage and time on site 9x above benchmark.

Social

16 Boosted Posts
1.1M+ Reach
392K+ Engagements
264K+ Video ThruPlays
16.8K+ Clicks
1.6% Engagement Rate
$0.15 CPE

PR

100% of coverage included key messages

10% above benchmark

Top 3 Key Messages:

- Great Britain feels exciting!
- Great Britain is a welcoming destination to visit.
- Great Britain offers a unique experience.

PR

393 pieces of coverage secured

213 million impressions

100% of coverage included a call to action
50% above benchmark

Website - AI Game

34K+ Sessions
09:27 Spent on Page
36.9% Engagement Rate
63.1% Bounce Rate

30.8K+ Game Plays

65% Display
15.6% Direct
10.2% Organic
5.8% Paid (Other)
1.7% Social (Organic)

Website - Content Sessions

Campaign Landing Page = 32.9K+

Liverpool = 4.4K+
Scotland = 3.8K+
Wales = 2.9K+
Newcastle = <1K+
Colchester(Essex) = <1K+

Insights from our recent KAM meetings

Trends

- **Storyfication** - Wales to be selling well with Welcome to Wrexham helping. Film + TV has constantly helped highlight certain areas of Britain.
- Seasonality shift – Seeing more visitors looking at the shoulder months and avoiding the busy summer months (May/June/Sep).
- Most are looking for one off experiences to compliment the usual famous attractions.
- North Americans are staying longer (average 11 nights). Many are returning to the UK, spending more and staying longer

Opportunities

- Now is a great time to push visitors to Britain with attractions struggling in other areas of Europe with mass tourism (Italy).
- Potential growth in new emerging sectors such as Accessible travel and Black history.
- Certain areas of Britain feel saturated and there is potential to push rural areas.
- Consumer are using Travel agents.
- Seeing an increase in luxury travel enquiries.
- Build on Britain’s strengths; culture, history and heritage and mixing the old with new.

Challenges

- Many operators are struggling to find competitive hotel rates in high demand locations and between May – October. Some are struggling to find rates for 2024 onwards.
- Train travel prices have increased resulting in other forms of transport required.
- Guides who cover multiple areas along with driver guides as hard to find.
- Questions regarding the new ETA Visa.
- Agent Training is needed - Many new travel agents that don’t have enough destination product knowledge.

USA Market Update Summary

The USA is the top source market for the UK and the key driver of global travel recovery. It was one of the first major tourism outbound market to rebound following the recovery from the pandemic, with strong pent up demand for international travel seen in 2021 and 2022.

The USA is leading UK's inbound tourism recovery as indicated by most recent inbound stats:

- The USA contines to solidify its position as the UK's the **largest and most value** market with IPS data showing visits and spend **recovered to pre-pandemic** levels in 2022. A total of **4.59 million visits** from the USA were recorded in 2022, a +2% increase on 2019. Tourism spend in the UK reached a **record high of £5.96 billion,** +42% more than 2019 and 37% up from the previous all-time high in 2017. £1 in every £5 spent by international visitors in 2022 was spent by an American.
- **US hit IPS records for both volume and value in Q1 2023**, demonstrating a further strengthing of the market, up +8% in volume and +35% in value vs 2019.
- **The UK overtakes France to be US's number 1 European inbound destination for American's** in 2022, for the first time since 2017.
- **North America remains the global region to see strongest rebounds in forward bookings and arrivals**. US bookings to the UK have exceeded 2019 levels for all but two weeks across 2023, outperforming all other global regions. Prospects for US arrivals in the next 3-6 months (Aug 23 – Jan 24) is particularly strong (+15%).
- **Connectivity between the US and UK is expected to fully recover from the pandemic by Q4 2023 finishing the year +1% up on 2019**. Scheduled seat capacity is expected to exceed 2019 levels by the end of Q3 2023, with seat capacity currently up +3% in September and +7% across October vs 2019.

Source: International Passenger Survey by the ONS 2019 – 2023, ForwardKeys (August 2023), Apex (August 2023), Oxford Economics, Deloitte State of the Consumer Tracker – July 2023

USA Market Update Summary

The US economy remains resilient and economic anxieties ease amongst travellers in the US:

- **Oxford Economics upgrades economic growth forecast**, with a mild recession now expected in Q4 2023. With easing inflation and GDP growth, economic anxieties begin to dampen amongst consumers.
- **Economic concerns amongst American travellers dissipate.** While costs still remain relatively high, airfare, gas and inflation costs begin to decline, improving consumer confidence to travel.
- **American's commitment to travel remains high.** Research shows that faced with tighter budgets, Americans are more likely to cut back on in-destination spending rather than accommodation and trip length.

US perceptions of Britain are strong:

- **UK travel intention amongst Americans is high.** VB's MIDAS research demonstrates a strong propensity to visit Britain with 66% of American respondents considering taking a break or holiday to Britain in the next 5 years.
- Recent VB MIDAS research on US travellers points towards Britain being seen as a **welcoming** and **inclusive** place to visit, over indexing against the global average. 55% of US associate 'a welcoming place to visit' with Britain and 58% agree its 'an inclusive and accessible place for visitors like me'. With unprecedented multiracial population growth across the US in the last 10 years, it is more important than ever to drive home these strong perception attributes.
- **Americans rank the UK highly in the Nations Brand Index:** The UK sat in 4th place ranking among Americans in the 2022 NBI, with 'Visiting if money was no object' reaching 3rd place, the highest ranking on record.

Source: Oxford Economics, Destination Analyst (July 2023), VB MIDAS Research – June 2022

Canada Market Update Summary

Canada's outbound travel landscape was slow to recover immediately following the pandemic but growth in regards to international travel and visits to the UK has rebounded from Q2 2022 into 2023.

The most recent IPS data release demonstrates that in 2022, Canadian visits and spend to the UK exceeded pre-pandemic level hitting new records.

- Across 2022 the UK welcomed 897,000 visits, spending £934 million. This represented 103% of the level of visits in 2019 and exceeded 2019 spend by 27%. For Q1 2023 volume and value is significantly higher than in Q1 2019, up +25% in visits and +29% in spend.
- Canada now represents the 9th largest and 7th most valuable tourism market to the UK, moving up the ranking by 5 places both in volume and value to sit within the top 10 key markets.
- The largest proportion of Canadian visitors who came to the UK in 2022 reside in Ontario (47%) and British Columbia (20%). These two provinces generated two-thirds of all inbound visits from Canada in 2022.

North America as a global region consistently outperforms the global average for bookings and arrivals. Forward Keys ticketing data demonstrates North America's significance in contributing to the recovery of international tourism industry in the UK.

- Flight bookings from North America to the UK have significantly exceeded 2019 levels across all but 3 weeks of 2023, consistently outperforming the global booking average. Since April 2023 arrivals on a weekly basis have remained around 95-97% the levels of 2019.

Connectivity between Canada and the UK has followed a steady positive trend across 2022, with scheduled capacity on par with 2019 levels for the last quarter of 2023.

- Seat capacity from Canada to the UK significantly picked up the pace in 2022, from 38% the 2019 level in Feb 2022, to reach a peak of around 89% in November 2022.
- In the first half of 2023 recovery momentum stabilised around an average 83% of pre-pandemic levels, however capacity is expected to improve in the coming months, nudging over 2019 levels in November 2023.

Source: *Oxford Economics – based on estimations, VB MIDAS Research – June 2022, NBI 2022, IPS 2022, Forward Keys (August 2023), Apex (August 2023)

Canada Market Update Summary

The UK is a key destination for Canadian visits to Europe with intention to visit the UK high.

- The UK became a top visited European destination in 2022*, ranking in joint first place with France, with each representing 21% of the European market. Oxford Economics forecast the UK position within the European competitor set to drop slightly, into second position across 2023 but will still remain ahead of pre-pandemic favourite, Italy.
- Almost 2 in 3 (65%) of Canadian international leisure travellers consider taking a break or holiday to Britain in the next 5 years.

Canadians hold favourable perceptions of Britain, with strong ancestral ties.

- An estimated 3rd of the Canadian population trace their heritage back to the UK, leading to a large proportion of Canadians taking a trip to visit friends or family. Almost 1 in 2 visited the UK for that primary reason in 2022 and was the most popular primary trip purpose overtaking holidays.
- **Canadian's see the UK in a very positive light:** 61% of Canadians associate Britain with 'a welcoming place to visit' and 59% agree Britain is 'an inclusive and accessible place for visitors like me'. Both perceptions are ranked higher than the global average of rankings.
- **Canadians rank the UK highly in the Nations Brand Index:** The UK sat in 6th place ranking among Canadians in the 2022 NBI, with 'Sport' reaching 5th place, returning to the highest ranking on record.

Canadian economic outlook remains uncertain, with the onset of a recession expected by the end of 2023.

- Economic concerns remain high on the agenda for Canadian travellers with 4 in 10 identifying affordable travel experiences as the most important criteria for choosing a destination currently.
- Financial concerns from rising interest rates and high (but lowering) inflation have led travellers to consider cutting their travel budgets, with willingness to sacrifice dining out as a top cut back when travelling this summer.

Source: Oxford Economics – based on estimations, VB MIDAS Research – June 2022, NBI 2022, IPS 2022, ETC Long Haul Barometer (June 2022),

Opportunities and challenges

Opportunities

- **Strong future intention to travel**
- **High-value travellers:** fully recovered market, spending more and staying longer
- **Embrace off peak season travel preference**: growing opportunity for low and shoulder season travel
- **Build on Britain's strengths and strong perception attributes**; culture, history and heritage and variety of places (old and new)

Challenges

High cost of living and inflation - Ideally allow options for multiple levels of budget to cater for need for value for money

Strong competition from other European markets – **value for money**

Tax free shopping competition