



INTERNATIONAL MARKET FOCUS UNITED KINGDOM (UK)

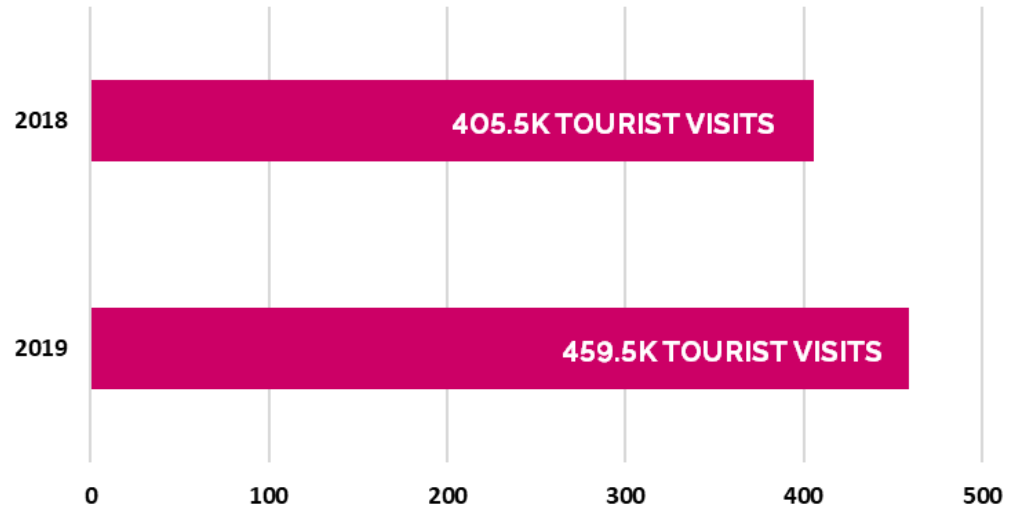
Fall 2023

DESTINATION
ONTARIO

MARKET SIZE

- The UK remained Ontario's largest source country for overseas visits in 2019, with **459,500 tourist visits to Ontario** (+13% over 2018).
- UK tourists stayed **10 nights** per overnight Ontario visit, on average, in 2019.
- The UK accounted for **13% of all overseas visits to Ontario** in 2019.

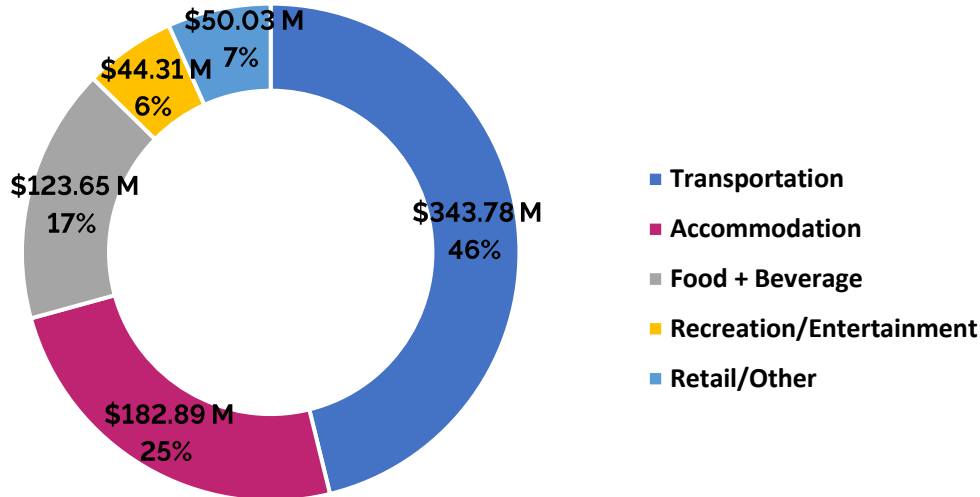
UNITED KINGDOM VISITS IN ONTARIO



VISITOR SPENDING

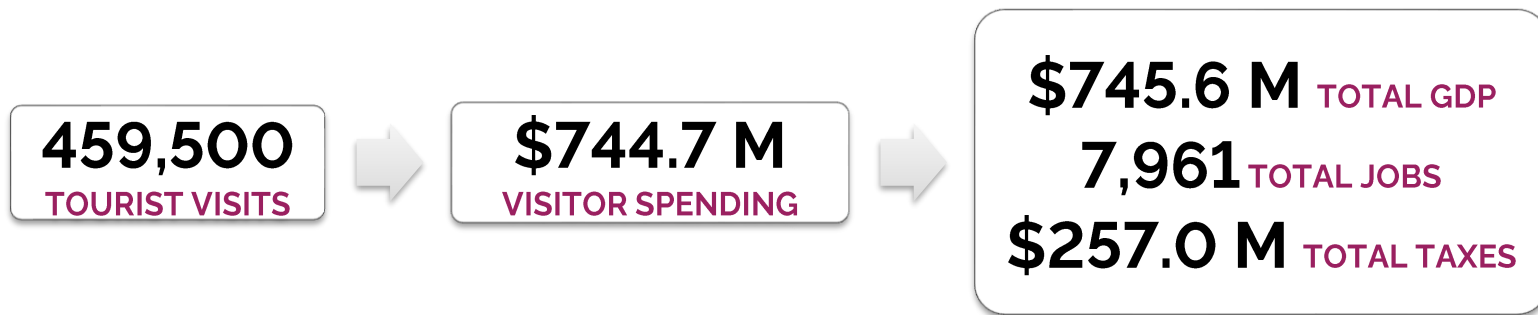
- Visitor spending in Ontario from the UK totalled **\$744.7 million** in 2019 (+14% from 2018).
- The UK accounted for **13% of overseas visitor spending in Ontario**.
- UK tourists spent an average of **\$1,621 per visit in Ontario** in 2019 – **7.3 times more** than the average spend per visit in Ontario. The largest share of visitor spending was on **transportation (46%)**.
- Destination Canada has estimated that it may take until 2025 for UK tourism spending in Canada to recover to 2019 levels.

UNITED KINGDOM SPENDING BY CATEGORY: 2019



THE VALUE OF THE UK TRAVELLER

ECONOMIC IMPACT OF VISITOR SPENDING FROM THE UK IN ONTARIO (2019)



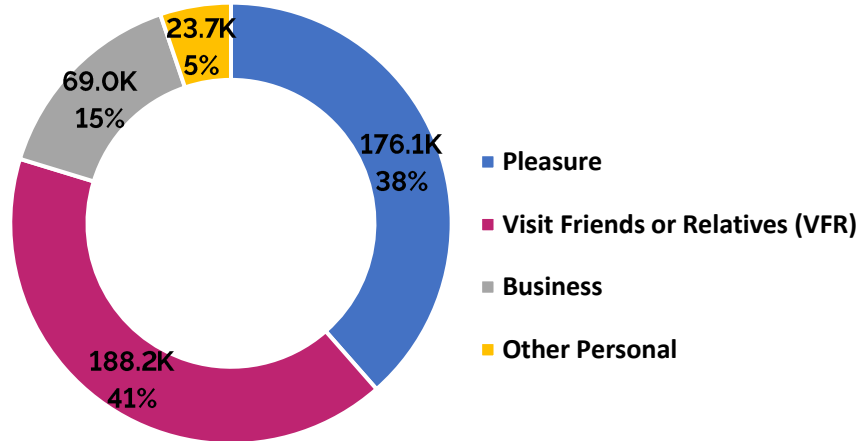
Source: Statistics Canada, Visitor Travel Survey (2019) and the Ontario Ministry of Tourism, Culture and Sport's Tourism Regional Economic Impact Model



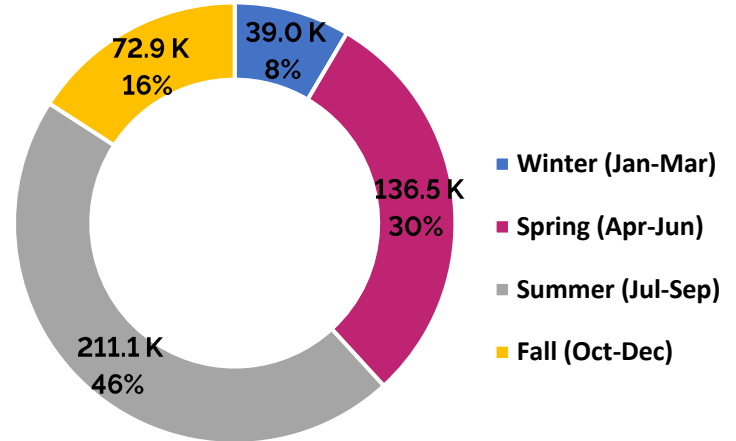
TRIP CHARACTERISTICS

- **41%** of tourist visits from the United Kingdom to Ontario were taken to **visit friends or relatives**
- **46%** of tourist visits from the UK to Ontario occurred in the **summer**

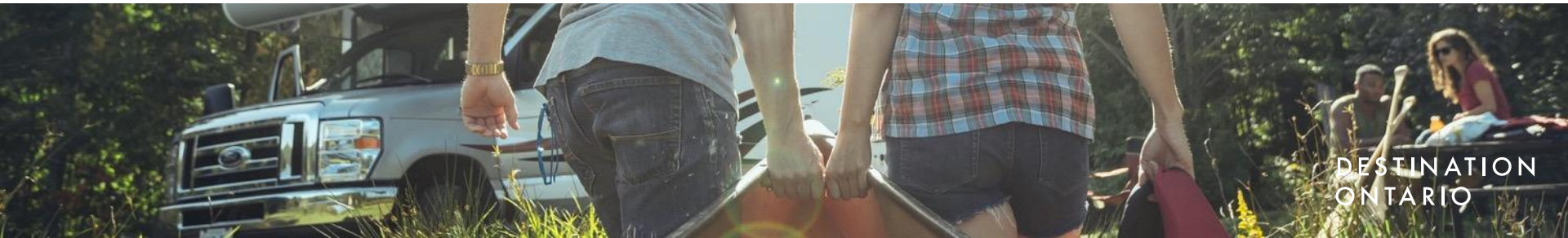
MAIN PURPOSE OF UK VISIT: 2019



UK SEASON OF VISIT: 2019



Source: Statistics Canada, Visitor Travel Survey



TRIP CHARACTERISTICS

TOP TRIP ACTIVITIES IN ONTARIO (2019)

TRIP ACTIVITY	% UK VISITS IN ONTARIO
Restaurant, bar or club	90%
Sightseeing	76%
Shopping	70%
Visit friends or family	53%
Historic site	51%

Source: Statistics Canada, Visitor Travel Survey

TOP TOURISM REGIONS VISITED (2019)

TOURISM REGION	% UK VISITS IN ONTARIO
Region 5: Greater Toronto Area	64%
Region 10: Ottawa and Countryside	34%
Region 2: Niagara Canada	33%
Region 9: Southeastern Ontario	9%
Region 3: Hamilton, Halton, Brant	6%

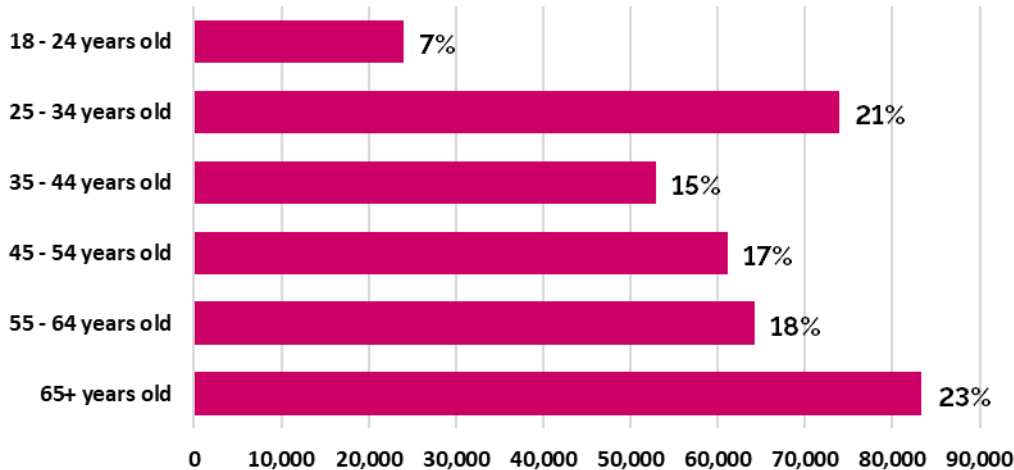


DESTINATION
ONTARIO

DEMOGRAPHICS

- The largest share of tourist visits from the UK to Ontario was from those aged 65+ years old (23%) in 2019. **The average age of a UK tourist to Ontario was 48.**
- 10% of UK travel parties to Ontario had children travelling with them in 2019.
- Of those who stated their gender, slightly more than half (53%) of UK visits to Ontario were taken by men in 2019.

UK VISITS TO ONTARIO BY AGE STATED (18+): 2019



Source: Statistics Canada, Visitor Travel Survey



DESTINATION
ONTARIO

POTENTIAL MARKET SIZE FOR CANADA



Total potential long-haul[^]
pleasure travellers aged
18 years or more



Target Market for Canada



Those in the dream to
purchase stages of the path
to purchase for Canada

Size of the target
market



Immediate Potential
for Canada



Will definitely/very likely visit
Canada in the next 2 years¹

Immediate potential



Source: Destination Canada 2022 Global Markets Traveller Incidence & Market Sizing Update

[^] Long-haul = outside of Europe, North Africa and the Mediterranean | ¹ Includes respondents likely to visit Canada for a trip of 1 to 3 nights, or a trip of 4 nights or more.





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