60.5 million US out-of-state leisure travellers intend to visit Canada in the next two years.

**Market Insights**

**Pent Up Savings**
While inflationary pressures are stirring fears of an impending recession, savings remain at an all time high for Americans and travel is at the top of their list for discretionary spending.

**Geo-Political Impacts**
Due to the ongoing war in Ukraine, many Americans are hesitant to travel to Europe in the near term. Canada can position itself as a safe and easy travel alternative over the coming months.

**Frictionless Travel**
Americans have low tolerance for friction, with clunky consumer experiences resulting in abandoned purchases. Seamless experiences throughout the travel journey – from information gathering all the way to in-destination activities – are key to positive sentiment and repeat travel.

**Market Potential**

Canada’s target market

**107,461,500**

56% are definitely/very likely to visit Canada in the next 2 years

60,498,500
Canada’s immediate potential in the next 2 years

**Demographics**

**Age**

<table>
<thead>
<tr>
<th>Age</th>
<th>18-34</th>
<th>35-54</th>
<th>55+</th>
</tr>
</thead>
<tbody>
<tr>
<td>34%</td>
<td>36%</td>
<td>30%</td>
<td></td>
</tr>
</tbody>
</table>

**Annual Household Income**

<table>
<thead>
<tr>
<th>Income</th>
<th>Less than $50,000</th>
<th>$50,000 to $99,999</th>
<th>$100,000 and over</th>
</tr>
</thead>
<tbody>
<tr>
<td>30%</td>
<td>33%</td>
<td>34%</td>
<td></td>
</tr>
</tbody>
</table>

**Children**

<table>
<thead>
<tr>
<th>Yes</th>
<th>No</th>
</tr>
</thead>
<tbody>
<tr>
<td>40%</td>
<td>60%</td>
</tr>
</tbody>
</table>

**Seasonal Demand**

- **2019 Actual Arrivals**
- **2021 Total Demand (%)**
  - Jan-Feb: 6%
  - Mar-Apr: 11%
  - May-Jun: 21%
  - Jun-Jul: 32%
  - Jul-Aug: 31%
  - Aug-Sep: 19%
  - Sep-Oct: 16%
  - Oct-Nov: 12%
  - Nov-Dec: 6%

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Top Motivators for Future Trip to Canada¹

- Is a safe place to visit: 38%
- Offers outdoor experiences I am interested in: 35%
- Opportunity to relax, unwind, and decompress: 34%
- Offers cultural experiences I am interested in: 32%
- Offers city experiences I am interested in: 31%

Top Barriers to Canada¹

- Cost: 26%
- Health risks: 22%
- Poor weather: 21%
- Safety concerns: 19%
- There are other places I would rather visit: 17%

Top Activities of Interest for Future Trip to Canada¹

- Trying local food and drink: 51%
- Northern lights: 51%
- Hiking or walking in nature: 49%
- Natural attractions like mountains or waterfalls: 48%
- Nature parks: 46%
- Fall colors: 41%
- Oceanside beaches: 41%
- Food and drink festivals or events: 40%
- Viewing wildlife or marine life: 40%
- Lakeside beaches: 39%

Travel Consideration by Province, % Likely to Visit by Region (Next 2 Years)¹

- BC: 48%
- AB: 34%
- SK: 14%
- ON: 56%
- QC: 47%
- ATL: 26%
- ON: 56%
- QC: 47%
- BC: 48%
- MB: 16%
- SK: 14%
- AB: 34%

Net Promoter Score (Normalized)¹

- North America: 9%
- Canada: 56%
- Mexico or the Caribbean: 47%
- Alaska: 26%
- Atlantic: 26%
- Florida & the South: 40%
- New England: 40%
- Pacific Northwest: 39%
- Rocky Mountains: 41%
- Texas & the Southwest: 41%
- Mid-Atlantic: 40%
- Midwest: 39%
- Europe: 35%
- Hawaii: 34%
- Alaska: 32%
- Canada: 56%
- Mexico or the Caribbean: 47%
- Alaska: 26%
- Atlantic: 26%
- Florida & the South: 40%
- New England: 40%
- Pacific Northwest: 39%
- Rocky Mountains: 41%
- Texas & the Southwest: 41%
- Mid-Atlantic: 40%
- Midwest: 39%

Travel Agent Usage for Future Trip to Canada¹

- NET Definitely / Very / Somewhat Likely: 63%

For further information, please contact:
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¹ Global Tourism Watch 2021.