



United States Market Highlights – Facts at a Glance

More than 4 million US Learners aged 25-44 intend to visit Canada for pleasure in the next two years.

2017 Performance



Arrivals¹

14.3M (↑3%)



Average Trip Spend²

\$663

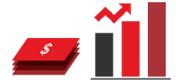
- 2017's lift in arrivals to Canada was seen predominantly among trips via air, up 7% over 2016. The increase in air arrivals was supported by a 4% increase in direct air capacity.
- Auto arrivals made up 56% of overnight visits to Canada, with 45% of vehicles registered to New York, Michigan and Washington states.

2018 Forecast



Visitor Forecast²

14.8M (↑3%)



Spend Forecast²

\$9.9B (↑5%)



Airline Seat Capacity³

↑**5%**



Local Currency vs CAD⁴

↓**1.1%**

Market Insights



The US is Canada's largest source market of international tourists, contributing to 69% of overnight arrivals.¹



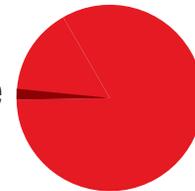
Destination Canada's US investment reflects the importance of this market, contributing \$30M in resources over 2018.



Consideration of Canada for leisure trips has risen, along with an improving knowledge of Canada's tourism products.⁵

Channel Investment Mix

1%
Travel Trade

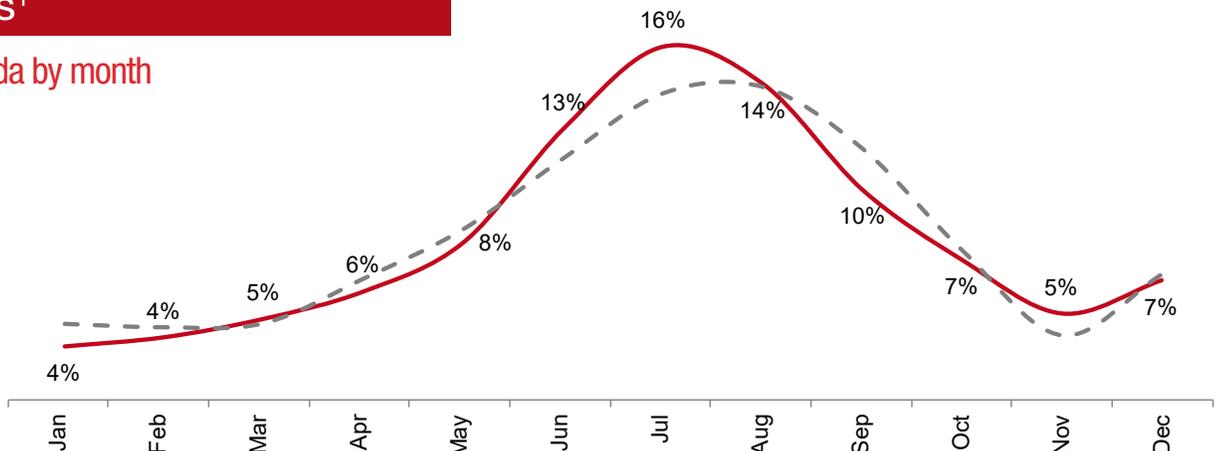


99%
Consumer Direct
& Earned Media

Travel Seasons¹

% of arrivals to Canada by month

— United States
- - Destination Canada Market Average



Market Potential⁵



8,685,000

Canada's target market



46%

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



4,004,000

Canada's immediate potential

Top Drivers⁵

The main features that American travellers desire in a destination are...

- 1** Great shopping
- 2** Proud to tell people I have visited
- 3** Allows me to de-stress
- 4** Unique culture that I want to experience on a vacation
- 5** Spend quality time with friends and/or family
- 6** Cities are great for exploring and soaking in the atmosphere
- 7** Great place for touring around to multiple destinations
- 8** Adventures that challenge me
- 9** Intellectually stimulating travel experiences
- 10** Adventures that everyone can enjoy

Target Audiences



Learners 25-44

They seek out distinctive experiences and cultures, crave learning and adventures that challenge them. They want experiential trips that stimulate them and give them a fresh perspective on life so that they can share their knowledge and opinions with others.

Key themes

Inspire with iconic and niche experiences that will make their experience in Canada unique and share-worthy.



Put Canada on the A-List

Bring to life and help foster Canada's overall cool factor.



Discovering cinematic, bragworthy scenes

Create opportunities for them to share Canada's coolness through cities, culture, and scenes.



Bragworthy adventures

Making adventures that challenge me worthy of and easy to share.

Canada

For further information, please contact:

Ms. Sarah Finstad
Executive Director, US Leisure Market
Destination Canada
Vancouver, Canada

finstad.sarah@destinationcanada.com

¹ Statistics Canada, Frontier Counts, 2017

² Destination Canada Research estimates, using Statistics Canada preliminary Q1-Q3 ITS, Frontier Counts and e311 adjusted data (April 2018)

³ IATA SRS Analyzer Data, March 2018

⁴ Tourism Economics, March 2018

⁵ Global Tourism Watch 2017