



Over 11 million Chinese long-haul leisure travellers intend to visit Canada in the next two years.

2018 Performance



2018 Arrivals¹
737,380
(↑6.1%)



2018 Average Trip Spend²
\$2,846

Key Insights

- Canada welcomed a record number of Chinese tourists in 2018, surpassing the 700K mark for the first time and doubling the number of annual travellers since 2013, with an average annual growth rate of 16%.¹
- China remained Canada's second largest long-haul market for arrivals in 2018 and largest for spend.^{1,2}
- Steady expansion of direct air capacity and the positive strength of the Chinese Yuan in Canada supported this growth in 2018.^{3,4}

2019 Forecast



Visitor Forecast²
763,920
(↑3.6%)



Spend Forecast (CAD)²
\$2.13 B
(↑5.8%)



Air Seat Capacity Growth³
↑10.3%

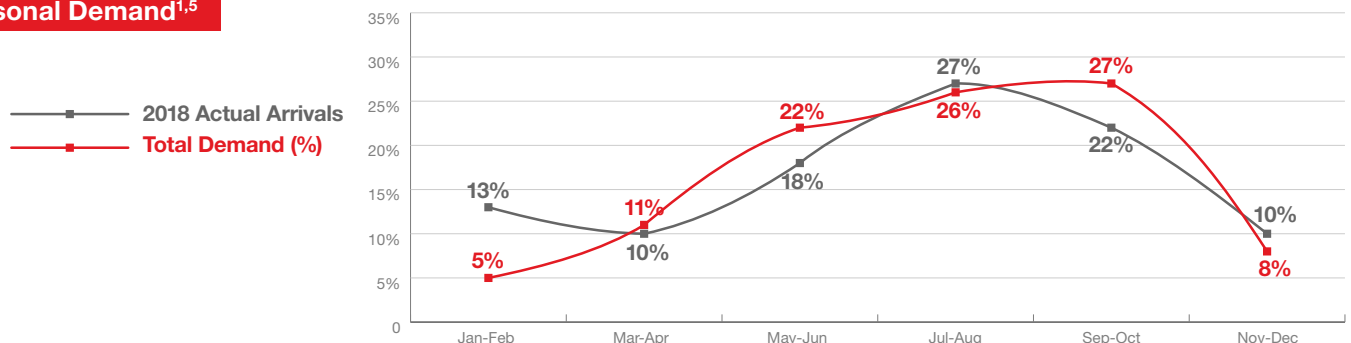


Local Currency vs. CAD⁴
↓5.2%

Market Insights

- In 2018, desire to visit Canada among Chinese leisure travellers was highest between July and October.⁵
- Seeing natural attractions like mountains or waterfalls, trying local food and drink, exploring Indigenous culture, hiking or walking in nature and viewing wildlife represent some of the top activities that Chinese leisure travellers want to do while on holiday.⁵
- 78% of Chinese leisure trips to Canada continue to be booked as part of an organized group travel package, with more than half of these being done online via a travel agent or tour operator.⁵

Seasonal Demand^{1,5}



¹ Statistics Canada, Frontier Counts, 2018.

² Destination Canada Research estimates, using Statistics Canada preliminary 2018 Q1-Q3 VTS, 2017 ITS Q4, Frontier Counts, National Tourism Indicators, Bank of Canada and visitor forecasts from Destination Canada 2019 Forecast.

³ IATA SRS Analyzer Data, March 2018.

⁴ Bank of Canada.

⁵ Global Tourism Watch 2018.



Market Potential⁵



Canada's target market
16,196,500



69%
are definitely/very likely to visit
Canada in the next 2 years

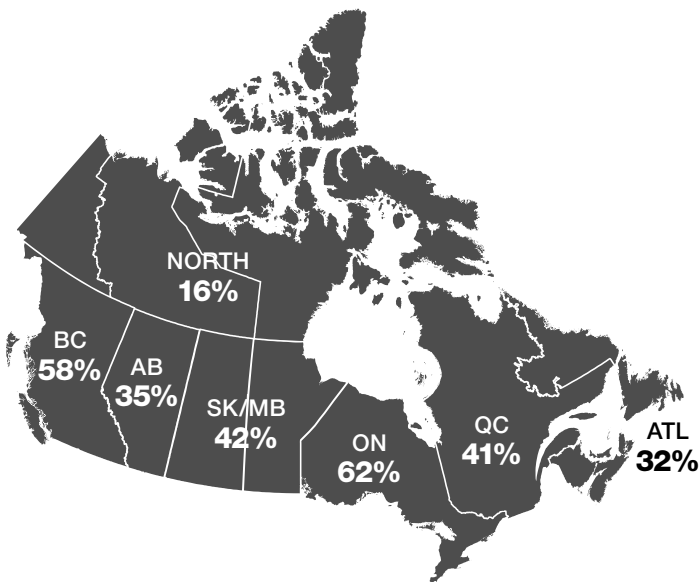


11,111,000
Canada's immediate potential

Top Drivers for Chinese Travellers to Any Destination⁵

- 1** Is a place to spend quality time with friends and/or family
- 2** Is a great place for regular vacations that avoid surprises
- 3** Is a place that allows me to de-stress
- 4** Offers good value for money
- 5** Is a place I would be proud to tell people I have visited
- 6** Its cities have a lot of great attractions to see and do
- 7** Is easy to travel to from where I live
- 8** Offers adventures that everyone can enjoy
- 9** Is a place that provides intellectually stimulating travel experiences
- 10** Its cities are great for exploring and soaking in the atmosphere

Travel Consideration by Province,
% Likely to Visit Region⁵



Travel Agent/Tour Operator Usage
For Recent Trip to Canada⁵

Used for either research <u>or</u> booking	95%
Used for both research <u>and</u> booking	64%
Used for research <u>only</u>	25%
Used for booking <u>only</u>	6%

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⁵ Global Tourism Watch 2018.