



Over 44 million US long-haul leisure travellers intend to visit Canada in the next two years.

2018 Performance



2018 Arrivals¹

14,440,350
(↑1.4%)



2018 Average Trip Spend²

\$685

Key Insights

- US arrivals reached 14.44 million in 2018, the highest level recorded since 2004.¹
- US arrivals growth was driven primarily by the 8.18 million auto arrivals in 2018, which were the largest source of overnight visitors to Canada, making up 57% of US arrivals in 2018.¹

2019 Forecast



Visitor Forecast²

14,758,040
(↑2.2%)



Spend Forecast (CAD)²

\$10.55 B
(↑6.8%)



Air Seat Capacity Growth³

↑3.8%



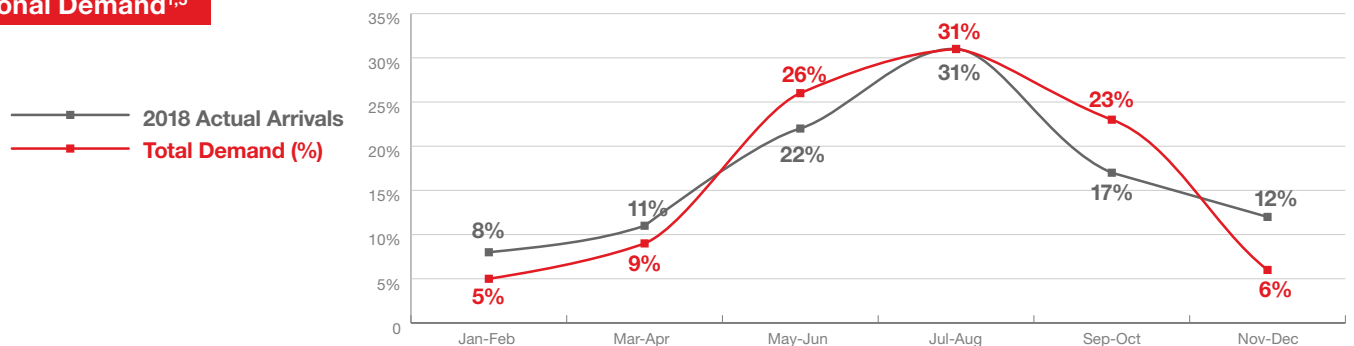
Local Currency vs. CAD⁴

↑2.9%

Market Insights

- American leisure travellers like to take advantage of the long weekends for travel, with Memorial Day, Independence Day and Labour Day contributing to the largest weekend spikes in road arrivals in 2018.⁵
- In 2018, 4 of the top 5 activities that American leisure travellers wanted to experience were nature-based, including seeing natural attractions, hiking or walking in nature, visiting nature parks and viewing wildlife.⁵
- An increasing proportion of American leisure travellers to Canada (69%) are choosing not to book organized group travel packages.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.

⁶ Statistics Canada, Frontier Counts based on daily Integrated Primary Inspection Lane (IPI) data, 2018.



Market Potential⁵



Canada's target market
105,017,000



42%
are definitely/very likely to visit
Canada in the next 2 years

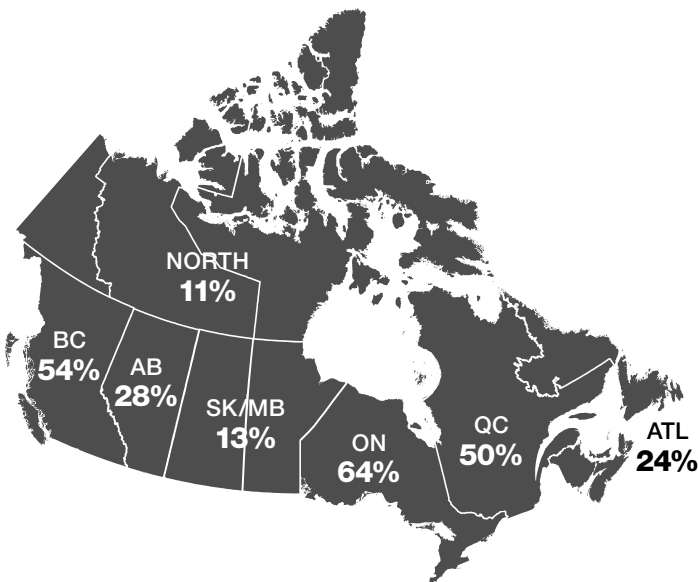


44,201,000
Canada's immediate potential

Top Drivers for US Travellers to Any Destination⁵

- 1** Is a place I would be proud to tell people I have visited
- 2** Is a place that allows me to de-stress
- 3** Has a unique culture that I would want to experience on a vacation
- 4** Offers adventures that challenge me
- 5** Is a great place for touring around to multiple destinations
- 6** Is a place that provides intellectually stimulating travel experiences
- 7** Has people that are friendly and welcoming
- 8** Has great summer outdoor activities I would participate in
- 9** Is a great place for regular vacations that avoid surprises
- 10** Has beautiful outdoor scenery and landscapes

**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	36%
Used for both research <u>and</u> booking	22%
Used for research <u>only</u>	10%
Used for booking <u>only</u>	4%

For further information, please contact:

Sarah Finstad
Regional Managing Director, North America
T +604-638-8352
finstad.sarah@destinationcanada.com

⁵ Global Tourism Watch 2018.