

Australia Market Highlights – Facts at a Glance

Nearly 3 million Australian long-haul pleasure travellers intend to visit Canada in the next two years.

2017 Performance



Arrivals¹

375K (↑13%)



Average Trip Spend²

\$2,324

- Canada welcomed a record number of Australian tourists in 2017.
- Increases in direct air capacity (up 29% over 2016), and strong economic fundamentals supported market growth.
- The lift in air capacity was due predominantly to continuation of the monthly Air Canada service between Brisbane and Vancouver.

2018 Forecast



Visitor Forecast²

388K (↑4%)



Spend Forecast²

\$983M (↑6%)



Airline Seat Capacity³

↑ **13%**



Local Currency vs CAD⁴

↓ **1.4%**

Market Insights



Australians are an attractive leisure target for Canada with 57% of Australian tourists to Canada visiting for pleasure and recreation.²



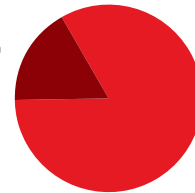
In 2017, Australian travellers were more likely than the average overseas visitor to arrive during the ski season, as well as Spring months.¹



Canada's credentials in providing beautiful outdoor experiences are well known among Australian travellers. Canada is also perceived as safe, friendly and welcoming.⁵

Channel Investment Mix

19%
Travel Trade

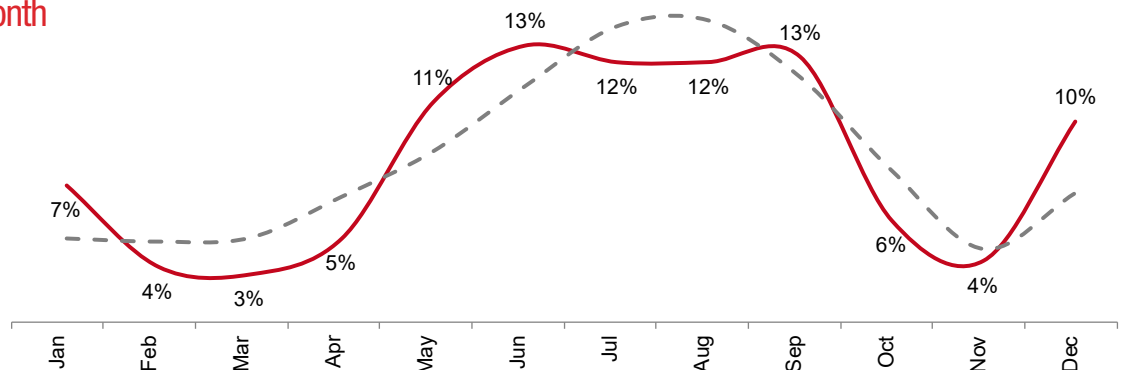


81%
Consumer Direct
& Earned Media

Travel Seasons¹

% of arrivals to Canada by month

— Australia
- - Destination Canada Market Average



Market Potential⁵



5,707,000

Canada's target market



47%

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



2,665,000

Canada's immediate potential

Top Drivers⁵

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

- 1** Proud to tell people I have visited
- 2** Safe place to visit
- 3** Beautiful outdoor scenery and landscapes
- 4** People are friendly and welcoming
- 5** Cities are great for exploring and soaking in the atmosphere
- 6** Great dining/food experiences
- 7** Allows me to de-stress
- 8** Cities have a lot of great attractions
- 9** Combines both outdoor activities and city experiences
- 10** Distinctive experiences during four seasons

Target Audiences



Cultural Explorers 25-34

They don't just want to "visit" - they want to immerse themselves in local culture, live like the locals and discover all the authentic places and experiences that makes Canada so special.

Key themes

Excite and inspire with unique and authentic experiences that will immerse them into Canadian culture.



Experiencing authentic Canadiana

Experience distinctively Canadian culture, personalities, and cuisine that can't be found at home.



Uncovering hidden gems

Finding the lesser-visited attractions that will make their experience in Canada unique.



Engaging with Canada's natural beauty

Participate in physically engaging outdoor activities while taking in Canada's natural beauty.



55+ Social Samplers

They make the most of their time when they travel - they want to experience all the iconic attractions Canada has to offer while they're there.

Key themes

Showcase thoroughly planned itineraries that connect travellers to iconic and niche Canadian experiences.



Nature connected to cities

Feeling wowed by Canada's beautiful landscapes and wildlife, while being stimulated by the culture and vibrancy of cities.



The history behind Canadian icons

Discovering the "must-see" attractions in Canada, and learning about their historical and cultural significance.



Exploring regions, not destinations

Tour multiple destinations through fly-drive experiences connecting urban and outdoor adventure.

Canada

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

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