



VISITOR FORECAST



Source: DC Research Estimates

China's lucrative market opportunity

In 2016, arrivals from China increased by 24% to an estimated 601,300 arrivals, contributing to \$1.254B in tourism receipts for Canada. 2017 is expected to be equally as bright for Canada, with increasing household consumption, solid disposable income growth and the expansion of air access into Canada via 11 gateway cities driving anticipated arrivals growth of 23% in 2017.

The Chinese spend big on travel

Recent research by Destination Canada suggests that 34% of Chinese long-haul travellers say they will spend more on travel outside Asia in 2017. Considering Chinese travellers already spend over \$2000 per trip in Canada, we can expect this to increase even more in 2017.

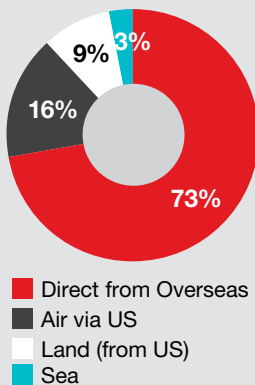
Holiday travel is driving growth to Canada

In 2016, holidays among Chinese visitors as their main trip purpose to Canada more than doubled when compared to 2015, which represented 96% of the net increase in visitors over the same time.

Exploring and soaking in the Canadian atmosphere is stimulating travel

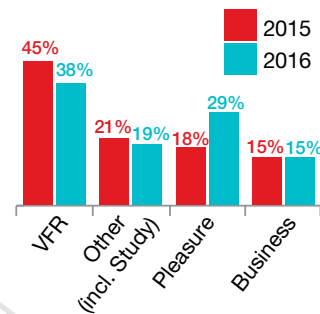
Chinese visitors enjoy well-rounded travel experiences to Canada, as it is perceived as combining the best of both outdoor activities and city experiences, as well as offering great historical and cultural opportunities.

MODE OF ENTRY



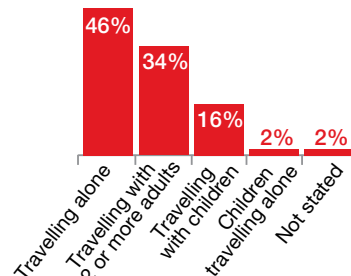
Source: Statistics Canada, Frontier Counts, 2016

MAIN TRIP PURPOSE



Source: Statistics Canada, International Travel Survey

LEISURE TRAVEL PARTY COMPOSITION, 2016



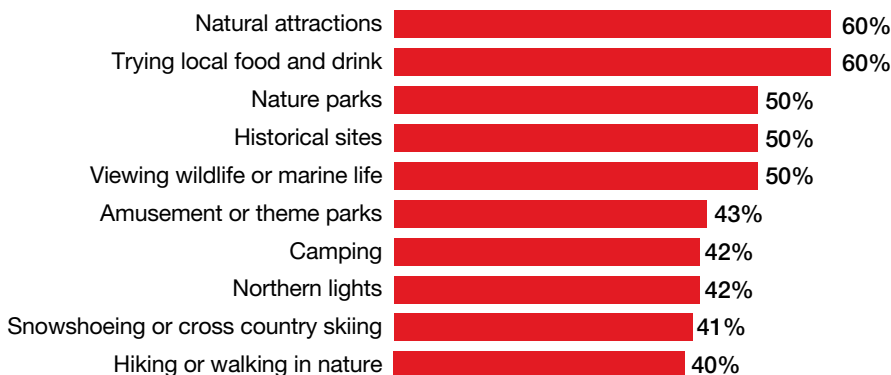
AGE DISTRIBUTION, 2016

Age Groups	Total	Business	Leisure*
<19	13%	0%	15%
20-34	26%	28%	26%
35-44	20%	42%	16%
45-54	19%	24%	18%
55-64	11%	2%	12%
>65	9%	0%	10%
Not Stated	3%	4%	2%

*"Leisure" is defined as travellers who stated their main trip purpose was either for pleasure/recreation, visiting family & friends, or other personal reasons (incl. study, medical and transit).

ACTIVITIES TRAVELLERS ARE INTERESTED IN - TOP 10

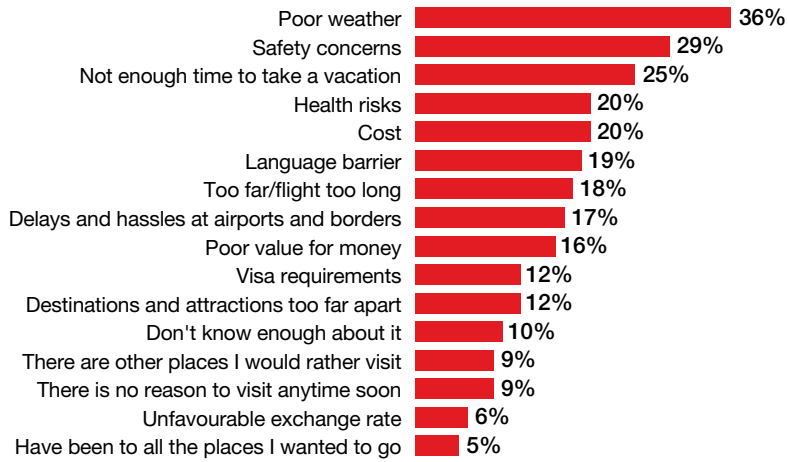
Source: Global Tourism Watch, 2016. Long-haul pleasure travellers (past 3 years or next 2 years) (n=2,204)





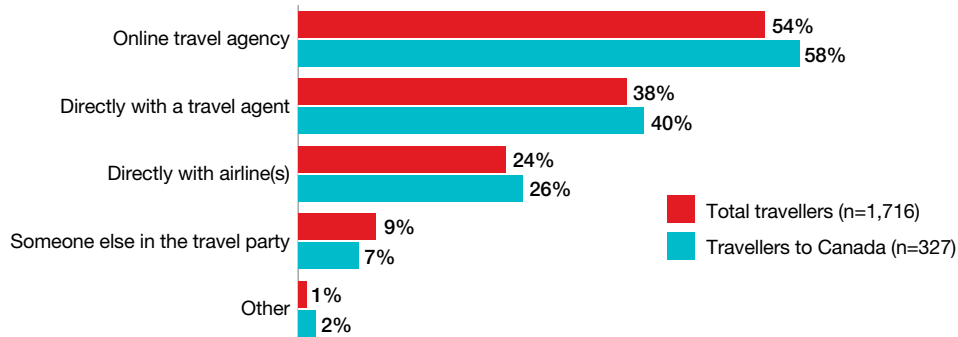
KEY BARRIERS FOR VISITING CANADA

Source: Global Tourism Watch, 2016. Long-haul pleasure travellers (past 3 years or next 2 years) (n=2,204)



FLIGHT BOOKINGS – MOST RECENT TRIP

Source: Global Tourism Watch, 2016. Long-haul pleasure travellers (past 3 years)



ACCOMMODATION BOOKINGS – MOST RECENT TRIP

Source: Global Tourism Watch, 2016. Long-haul pleasure travellers (past 3 years)

