



# 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



Arrivals<sup>1</sup>

**14.3M** (↑3%)



Average Trip Spend<sup>2</sup>

**\$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 Forecast<sup>2</sup>

**14.8M** (↑3%)



Spend Forecast<sup>2</sup>

**\$9.9B** (↑5%)



Airline Seat Capacity<sup>3</sup>

↑**5%**



Local Currency vs CAD<sup>4</sup>

↓**1.1%**

## Market Insights



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



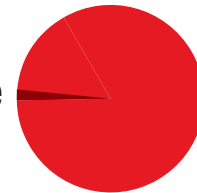
Destination Canada's US investment reflects the importance of this market, contributing \$30M in resources over 2018.



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

## Channel Investment Mix

**1%**  
Travel Trade

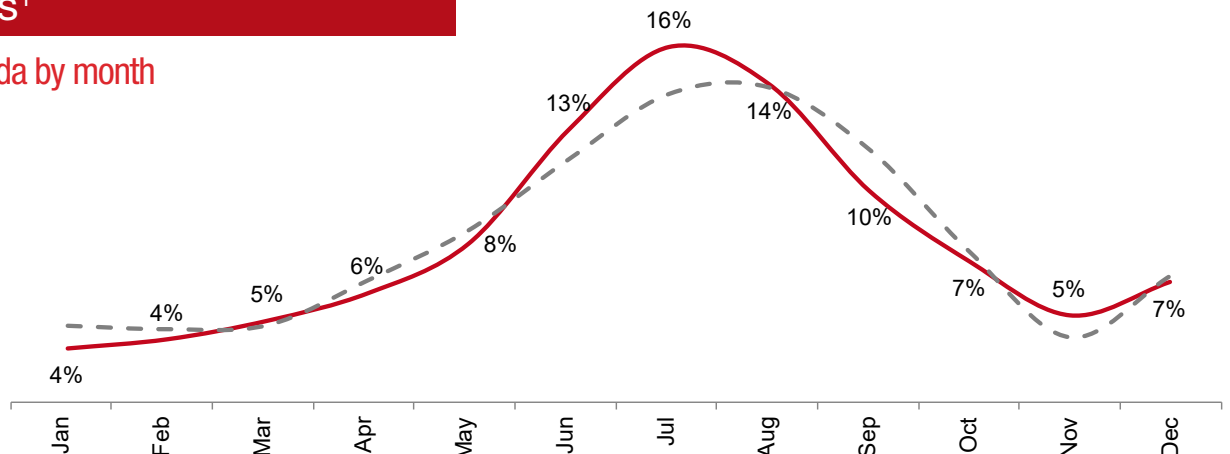


**99%**  
Consumer Direct  
& Earned Media

## Travel Seasons<sup>1</sup>

### % of arrivals to Canada by month

— United States  
- - Destination Canada Market Average



## Market Potential<sup>5</sup>



**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 Drivers<sup>5</sup>

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

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<sup>1</sup> Statistics Canada, Frontier Counts, 2017

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

<sup>3</sup> IATA SRS Analyzer Data, March 2018

<sup>4</sup> Tourism Economics, March 2018

<sup>5</sup> Global Tourism Watch 2017