

# 2019 Market Snapshots:

Understanding the Opportunity for Indigenous Tourism Business in Canada

## ASIA PACIFIC

AUSTRALIA  
CHINA  
JAPAN  
SOUTH KOREA

## EUROPE & INDIA

FRANCE  
GERMANY  
UNITED KINGDOM  
INDIA

## NORTH AMERICA

MEXICO  
UNITED STATES  
CANADA



**INDIGENOUS**  
TOURISM ASSOCIATION OF CANADA  
ASSOCIATION TOURISTIQUE  
**AUTOCHTONE**  
DU CANADA



**DESTINATION  
CANADA**







# Australia Market Snapshot

Australian travellers are most interested in visiting British Columbia, Ontario and Alberta, drawn by the major cities, popular ski locations and iconic natural attractions. They are most likely to visit more than one province during their trip.



Arrivals to Canada in 2017

**363K**

Inbound Travel to Canada  
Market Rank

**#6**

Average Length of Stay  
(Nights)

**15.8**

Average Spend Per Visitor  
(Excluding Air)

**\$2,924**

YOY Arrivals  
(2017 vs. 2016)

**↑ 13%**

YTD Arrivals  
(2018 vs. 2017; YTD July)

**↓ 7%**

## Indigenous Tourism Opportunity

TRAVELLERS IN THE PAST 3 YEARS  
THAT TOOK PART IN AN INDIGENOUS  
EXPERIENCE

**16%**

% OF MARKET INTERESTED IN  
INDIGENOUS CULTURAL EXPERIENCES

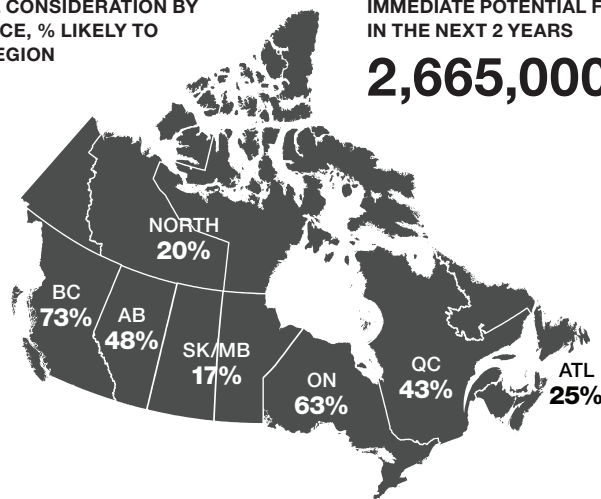
**28%**

IMMEDIATE POTENTIAL FOR  
INDIGENOUS TOURISM IN THE  
NEXT 2 YEARS

**746,000**



TRAVEL CONSIDERATION BY  
PROVINCE, % LIKELY TO  
VISIT REGION



IMMEDIATE POTENTIAL FOR CANADA  
IN THE NEXT 2 YEARS

**2,665,000**



Top 10 Activities of Interest

- 1 Trying local food and drink
- 2 Natural attractions like mountains or waterfalls
- 3 Viewing wildlife or marine life
- 4 Nature parks
- 5 Historical, archaeological or world heritage sites
- 6 Northern lights
- 7 Hiking or walking in nature
- 8 Food and drink festivals or events
- 9 City green spaces like parks or gardens
- 10 Shopping for items that help me remember my trip

Out of 46 activities, interest in  
*Exploring aboriginal culture, traditions  
or history* ranked **#23**



## The Australia Traveller Types

Destination Canada research shows that these two types of travellers are most likely to consider immediate travel to Canada.



### CULTURAL EXPLORERS 25-34

#### What do they want out of their travel?

Cultural Explorers live for travel, and strive to live like a local - they are always seeking out opportunities to embrace, discover and immerse themselves in local culture, and connect with the people of the places they visit. Cultural Explorers gravitate towards unstructured travel, and prefer to visit places of cultural, historical or natural significance. They want to be in control, and define their travel experiences on their own terms. They value spontaneity in their travel - it enriches the experience.

#### What are their impressions of Canada?

Canada is perceived to be a safe place with beautiful outdoor scenery and wildlife. They intend to travel to Canada to be outside - they perceive Canada to offer great outdoor and city experiences. In particular, they perceive Canada to offer great winter activities and a hospitable culture.

#### What stands in the way of them visiting?

Cost, distance and perceived time to take a vacation are the top barriers to visitation. Despite these barriers, the likelihood of them visiting is relatively high - 49% of 25-34 Australian travellers intend to travel to Canada in the next 2 years.



### SOCIAL SAMPLERS 55+

#### What do they want out of their travel?

Social Samplers enjoy the shared experience of travelling as part of a group, but feel the pressure of limited time when travelling. As a result, they are samplers, who actively seek out a destination's icons, and prefer structured travel - it affords them maximum efficiency when touring. Travelling is a part of their identity, and they are able to find novelty in even the most ordinary moments of everyday life.

#### What are their impressions of Canada?

The predominant draw to Canada is nature: wildlife and landscapes. Being a safe, friendly and welcoming place is conducive to travellers' affinity for social connection. They take pride in visiting Canada, perceiving it as a place where they can do and experience things they can't at home.

#### What stands in the way of them visiting?

Cost is the most significant barrier. They are not concerned about having enough time to take a vacation, but are concerned about the length of the flight. They also appear to be more sensitive to exchange rates - nearly 1 in 5 cited an unfavourable exchange rate as a barrier to visitation, and it is among the top 3 barriers overall for this target.



## Activities and Experiences Most Appealing to the Australia Traveller

Destination Canada has identified the kinds of experiences these visitors are looking for. You can use these themes to make your experience more appealing to travellers from Australia, or find ways to partner with other businesses to target the customer.

Our Content Themes are developed at a Global level, and adapted for market relevance. The themes ensure our Brand Position and Editorial Vision are aligned to the interests and travel motivators of our target audience.

### Average Booking Lead Time

<b>WINTER</b> <b>90</b> DAYS	<b>SPRING</b> <b>75</b> DAYS
<b>SUMMER</b> <b>96</b> DAYS	<b>FALL</b> <b>65</b> DAYS



### Vibrant Cities

Canada's vibrant cities are filled with **trendy neighbourhoods and friendly Canadians** willing to help travellers discover for themselves why these are the best places in the world to live. Endless culinary experiences, art galleries and museums, and green spaces highlight these **authentic, urban adventures**.



### Natural Wonders on a Canadian Scale

Welcome to the stunning beauty of Canada's outdoors. Here, **awe-inspiring scenery and wildlife** inspire **exhilarating and unique adventures**. The changing seasons provide year-round entertainment for travellers who wish to **experience Canada the way Canadians do**.



### Incomparable Culture & Heritage

It's the friendly people, historical neighbourhoods, multicultural food and arts, and the festivals and nightlife that make Canada **rich with culture**. Travellers will discover a heritage weaved together from Indigenous and European history and rich, diverse communities.



### Memorable Food & Drink

Canada's **natural bounty of ingredients** encourages local chefs to be mindful of their rich environment and explore their creativity through **local and authentic dining experiences** that you just can't experience in Australia.



### Engaging Road Trips

Journeying between regions is the best way to **discover Canada freely**. Experience vibrant cities, epic natural wonders, iconic cultural & heritage attractions, captivating communities, and **friendly locals who welcome visitors** and share an insider's perspective on how and where to travel.





# China Market Snapshot

Chinese travellers are most likely to visit British Columbia and Ontario during their visits, and are more likely to visit multiple provinces during their trip.



Arrivals to Canada in 2017

**672.3K**

Inbound Travel to Canada  
Market Rank

**#3**

Average Length of Stay  
(Nights)

**15.8**

Average Spend Per Visitor  
(Excluding Air)

**\$2,668**

YOY Arrivals  
(2017 vs. 2016)

**↑ 12%**

YTD Arrivals  
(2018 vs. 2017; YTD July)

**↑ 5%**

## Indigenous Tourism Opportunity

TRAVELLERS IN THE PAST 3 YEARS  
THAT TOOK PART IN AN INDIGENOUS  
EXPERIENCE

**27%**

% OF MARKET INTERESTED IN  
INDIGENOUS CULTURAL EXPERIENCES

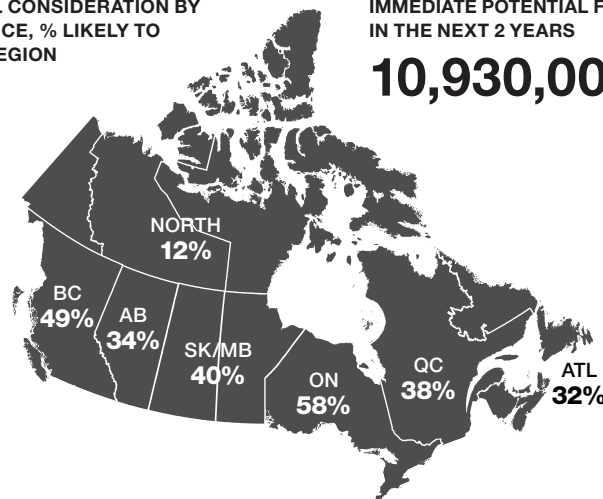
**35%**

IMMEDIATE POTENTIAL FOR  
INDIGENOUS TOURISM IN THE  
NEXT 2 YEARS

**3,825,500**



TRAVEL CONSIDERATION BY  
PROVINCE, % LIKELY TO  
VISIT REGION



IMMEDIATE POTENTIAL FOR CANADA  
IN THE NEXT 2 YEARS

**10,930,000**



Top 10 Activities of Interest

- 1 Natural attractions like mountains or waterfalls
- 2 Trying local food and drink
- 3 Historical, archaeological or world heritage sites
- 4 Nature parks
- 5 Viewing wildlife or marine life
- 6 Amusement or theme parks
- 7 Camping
- 8 Snowshoeing or cross country skiing
- 9 Northern lights
- 10 Exploring aboriginal culture, traditions or history



## The China Traveller Types

Destination Canada research shows that these two types of travellers are most likely to consider immediate travel to Canada.



### FREE SPIRITS 35-44

#### What do they want out of their travel?

Chinese Free Spirits are passionate and committed explorers who seek experiences that give them status and recognition. They are “brand name” travellers, who seek out culturally relevant experiences and want to see the icons. They have a strong desire for cultural immersion and group travel - shared experience with family and friends is important. They want to indulge, feel pampered, and do a little of everything. They are motivated to see natural and historical icons.

#### What are their impressions of Canada?

Chinese Free Spirits 35-44 see Canada as a place with beautiful outdoor scenery, and a place where they can view wildlife in its natural habitat. They perceive Canada as a safe place, where they can de-stress - it's seen as a place where travellers can enjoy a vacation without surprises.

#### What stands in the way of them visiting?

Weather is the predominant barrier to visiting Canada - Free Spirits were significantly more likely to cite weather as a barrier than other Chinese travellers in the same age cohort. Concerns over not having enough time to take a vacation and safety were cited as concerns by nearly one-third of Chinese Free Spirits 35-44.



### ASPIRING ESCAPISTS 35-44

#### What do they want out of their travel?

Chinese Aspiring Escapists are looking for a break from it all - they are stressed about life in general, and want luxurious, worry-free experiences that give them reprieve from it all. They are relatively apprehensive travellers, who seek to relate their experiences to what they know from home. They seek soft adventure experiences that give them the simple pleasures of life, but can also give them great stories to take back home.

#### What are their impressions of Canada?

They see Canada as a place with balance of beautiful outdoor scenery and landscapes and great dining and food experiences. They also enjoy how Canada offers distinctive experiences throughout all four seasons.

#### What stands in the way of them visiting?

Language, safety and cost are the main barriers to visitation. Though Canada is seen as an appealing destination, Aspiring Escapists consider visiting other destinations over Canada, particularly destinations in Asia and the US.





## Activities and Experiences Most Appealing to the China Traveller

Destination Canada has identified the kinds of experiences these visitors are looking for. You can use these themes to make your experience more appealing to travellers from China, or find ways to partner with other businesses to target the customer.

Our Content Themes are developed at a Global level, and adapted for market relevance. The themes ensure our Brand Position and Editorial Vision are aligned to the interests and travel motivators of our target audience.

### Average Booking Lead Time

WINTER 31 DAYS	SPRING 23 DAYS
SUMMER 38 DAYS	FALL 26 DAYS



### Vibrant Cities

Canada's vibrant cities provide travellers with countless ways to **indulge and treat themselves**. With luxury hotels, innovative restaurants, and shopping in cool boutiques, urban vacations in Canada are world-class.



### Natural Wonders on a Canadian Scale

**Nestled next to cities**, the majestic Canadian outdoors is the most **relaxing place to destress** at any time of year. Spacious, open, and clean, the pristine Canadian wilderness is a **breath of fresh air** for travellers. Best of all, it's all easily accessible from luxurious wilderness retreats and hotels.



### Incomparable Culture & Heritage

Canadian culture weaves together **fascinating Indigenous and European history**, our love for nature, and **multiculturalism**. Experience the art, history, architecture, and fashion, and come away with **brag-worthy, uniquely Canadian** photos, decorations, and outfits for friends and family back home.



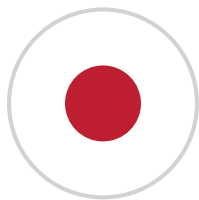
### Memorable Food & Drink

From Maple Syrup to haute cuisine, Canada's culinary scene has emerged as **world-class**. Cities are filled with restaurants where you can **indulge on truly local ingredients** in dishes and drinks that look as good as they taste.



### Engaging Road Trips

**Travelling between Canada's cities** provides countless opportunities to see epic natural wonders, iconic attractions, cultural events, and accessible Canadian adventures. Enjoy **guided journeys**, train or boat tours, and **an endless array of things to do** along the way.



# Japan Market Snapshot

Japanese travellers show increased interest to visit Western Provinces; and interest in Atlantic Regions strong too.



Arrivals to Canada in 2017

**287.1K**

Inbound Travel to Canada  
Market Rank

**#8**

Average Length of Stay  
(Nights)

**8.1**

Average Spend Per Visitor  
(Excluding Air)

**\$2,019**

YOY Arrivals  
(2017 vs. 2016)

**↓ 1%**

YTD Arrivals  
(2018 vs. 2017; YTD July)

**↓ 19%**

## Indigenous Tourism Opportunity

TRAVELLERS IN THE PAST 3 YEARS  
THAT TOOK PART IN AN INDIGENOUS  
EXPERIENCE

**7%**

% OF MARKET INTERESTED IN  
INDIGENOUS CULTURAL EXPERIENCES

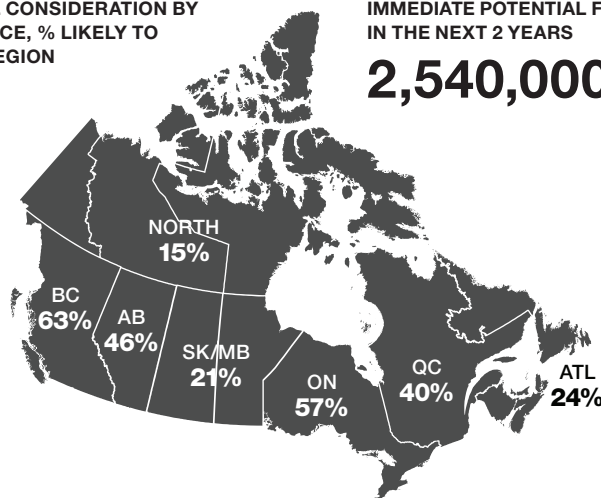
**21%**

IMMEDIATE POTENTIAL FOR  
INDIGENOUS TOURISM IN THE  
NEXT 2 YEARS

**533,500**



TRAVEL CONSIDERATION BY  
PROVINCE, % LIKELY TO  
VISIT REGION



IMMEDIATE POTENTIAL FOR CANADA  
IN THE NEXT 2 YEARS

**2,540,000**



## Top 10 Activities of Interest

- 1 Natural attractions like mountains or waterfalls
- 2 Hiking or walking in nature
- 3 Historical, archaeological or world heritage sites
- 4 Trying local food and drink
- 5 Northern lights
- 6 Nature parks
- 7 City green spaces like parks or gardens
- 8 Fall colours
- 9 Shopping for items that help me remember my trip
- 10 Art galleries or museums

Out of 46 activities, interest in  
*Exploring aboriginal culture, traditions  
or history* ranked **#14**





## The Japan Traveller Types

Destination Canada research shows that these two types of travellers are most likely to consider immediate travel to Canada.



### FREE SPIRITS 25-34

#### What do they want out of their travel?

Japanese 25-34 target travellers in general say that relaxing, unwinding and decompressing is the top factor when considering a destination selection. They also want to visit destinations that are on their bucket list.

#### What are their impressions of Canada?

Japanese Free Spirits 25-34 most closely associate a vacation in Canada with seeing wildlife and outdoor scenery. They feel that they can get the best of both outdoor activities and city experiences, and that it is a safe place to visit.

#### What stands in the way of them visiting?

Cost and flight length are the most significant barriers to visiting Canada. A lack of understanding of vacation opportunities (don't know enough about Canada), competition from destinations that sit higher on the consideration list, and not feeling like there is any reason to visit anytime soon are also top barriers to visitation.



### CULTURAL HISTORY BUFFS 55+

#### What do they want out of their travel?

Cultural History Buffs 55+ want to unwind, and immerse themselves in bucket list-cultural and city experiences. They are less concerned about budget, and more interested in finding activities that are aligned to their passions.

#### What are their impressions of Canada?

Japanese Cultural History Buffs 55+ perceive Canada as a safe place to view natural attractions and wildlife, offering distinctive experiences in all seasons.

#### What stands in the way of them visiting?

There are other places they want to visit, and feel that the time, distance and cost aren't worth it. Though nearly 40% cite that nothing would prevent them from visiting, Canada ranks 16<sup>th</sup> in consideration and only 3% are actively planning.



## Activities and Experiences Most Appealing to the Japan Traveller

Destination Canada has identified the kinds of experiences these visitors are looking for. You can use these themes to make your experience more appealing to travellers from Japan, or find ways to partner with other businesses to target the customer.

Our Content Themes are developed at a Global level, and adapted for market relevance. The themes ensure our Brand Position and Editorial Vision are aligned to the interests and travel motivators of our target audience.

### Average Booking Lead Time

<b>WINTER</b> <b>30</b> DAYS	<b>SPRING</b> <b>33</b> DAYS
<b>SUMMER</b> <b>31</b> DAYS	<b>FALL</b> <b>25</b> DAYS



### Vibrant Cities

Extravagant cuisine, great shopping and a unique atmosphere highlight Canada's **world-class cities**. **Crafted by multiculturalism**, these cosmopolitan urban centres are packed with authentic Canadian experiences, accessible green spaces, and **Instagrammable moments**.



### Natural Wonders on a Canadian Scale

Canada's cities exist on the edge of inspiring nature, allowing travellers to **escape to the wilderness** to unwind, decompress, and breathe at any time of year. Natural retreats **balance breathtaking scenery with modern amenities**, so experiencing the wilderness is both spiritual and premium.



### Incomparable Culture & Heritage

Canadian culture weaves together **fascinating Indigenous and European history**, our love for nature, and **multiculturalism**. Experience the art, history, architecture, and fashion, and come away with **brag-worthy, uniquely Canadian** photos, decorations, and outfits for friends and family back home.



### Memorable Food & Drink

There's a taste in Canada that is distinct and defining, inspired by our natural bounty of ingredients. Travellers can experience culinary classes and festivals, or discover distinctive farm-to-table dining and local wineries, distilleries, and breweries that deliver authentic flavours that **can't be found in Japan**.



### Engaging Road Trips

Touring through Canada is safe, accessible, and a great way to see the best Canada has to offer. Not only is **exploring multiple destinations** in one trip doable, but the journey between cities is littered with incredible natural wonders, breathtaking scenery, iconic attractions, and friendly locals.





# South Korea Market Snapshot

South Korean travellers show a high degree of interest in Quebec.



Arrivals to Canada in 2017

**280.1K**

Inbound Travel to Canada  
Market Rank

**#9**

Average Length of Stay  
(Nights)

**7.9**

Average Spend Per Visitor  
(Excluding Air)

**\$1,751**

YOY Arrivals  
(2017 vs. 2016)

**↑ 17%**

YTD Arrivals  
(2018 vs. 2017; YTD July)

**↓ 4%**

## Indigenous Tourism Opportunity

TRAVELLERS IN THE PAST 3 YEARS  
THAT TOOK PART IN AN INDIGENOUS  
EXPERIENCE

**21%**

% OF MARKET INTERESTED IN  
INDIGENOUS CULTURAL EXPERIENCES

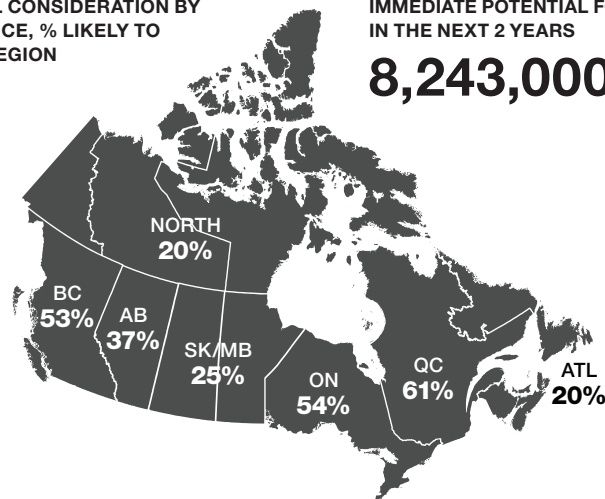
**32%**

IMMEDIATE POTENTIAL FOR  
INDIGENOUS TOURISM IN THE  
NEXT 2 YEARS

**2,638,000**



TRAVEL CONSIDERATION BY  
PROVINCE, % LIKELY TO  
VISIT REGION



IMMEDIATE POTENTIAL FOR CANADA  
IN THE NEXT 2 YEARS

**8,243,000**



## Top 10 Activities of Interest

- 1 Natural attractions like mountains or waterfalls
- 2 Hiking or walking in nature
- 3 Trying local food and drink
- 4 Nature parks
- 5 Culinary tours or cooking classes
- 6 City green spaces like parks or gardens
- 7 Food and drink festivals or events
- 8 Historical, archaeological or world heritage sites
- 9 Art galleries or museums
- 10 Camping

Out of 46 activities, interest in  
*Exploring aboriginal culture, traditions  
or history* ranked **#14**



## The South Korea Traveller Types

Destination Canada research shows that these two types of travellers are most likely to consider immediate travel to Canada.



### FREE SPIRITS 25-34

#### What do they want out of their travel?

Korean Free Spirits 25-34 want to experience new cultures and get to know the atmosphere and life of the places they visit. They are here for a short time, but a good one: they are samplers, and want to do a little bit of everything. They want to meet new people, but want to feel safe and welcomed as they immerse themselves in things they can't do at home.

#### What are their impressions of Canada?

Canada is seen as a place with beautiful scenery and landscapes, where travellers can experience things they can't at home. Canada is also seen as a safe place, and a destination with great wildlife viewing.

#### What stands in the way of them visiting?

Flight length / travel time is the largest barrier to visitation - nearly half of Free Spirits 25-34 cited it as a barrier. Cost and time to take a vacation were also cited as strong barriers to visiting Canada.



### FREE SPIRITS 55+

#### What do they want out of their travel?

Korean Free Spirits 55+ are looking to experience a variety of attractions and activities in both nature and cities. They desire unique and distinct experiences that they can share with family and friends - it is a source of relaxation and enjoyment. Travellers want to feel safe among friendly and welcoming people, and desire to immerse themselves in things they can't do at home - it gives them a sense of pride.

#### What are their impressions of Canada?

Canada is predominantly perceived as a destination with beautiful scenery and landscapes. Free Spirits 55+ also believe Canada is a place to spend quality time with family and/or friends, and that it's a place to de-stress.

#### What stands in the way of them visiting?

Flight length / travel time is the largest barrier to visitation, cited by 1/3 of Korean Free Spirits 55+. The distance between attractions and the time needed to take a vacation were also cited as top barriers to visitation.





## Activities and Experiences Most Appealing to the South Korea Traveller

Destination Canada has identified the kinds of experiences these visitors are looking for. You can use these themes to make your experience more appealing to travellers from South Korea, or find ways to partner with other businesses to target the customer.

Our Content Themes are developed at a Global level, and adapted for market relevance. The themes ensure our Brand Position and Editorial Vision are aligned to the interests and travel motivators of our target audience.

### Average Booking Lead Time

WINTER 38 DAYS	SPRING 34 DAYS
SUMMER 51 DAYS	FALL 47 DAYS



### Vibrant Cities

Canada's vibrant cities have an **amazing atmosphere**, where friendly locals share in the best, most **Instagram-worthy experiences** you can't find anywhere else. Treat yourself to luxury hotels, spas, stimulating nightlife, world-class cuisine, designer shopping and people-watching.



### Natural Wonders on a Canadian Scale

Canada is a gorgeous country **to see and be seen in**. With vibrant cities set against stunning natural landscapes that are easily accessible, it's the perfect setting for **creating memories to share** with your friends and family back home. Relax, unwind, breathe freely, and celebrate your carefree spirit.



### Incomparable Culture & Heritage

Canadian culture weaves together **fascinating Indigenous and European history**, our love for nature, and **multiculturalism**. Experience the art, history, architecture, and fashion, and come away with **brag-worthy, uniquely Canadian** photos, decorations, and outfits for friends and family back home.



### Memorable Food & Drink

From Maple Syrup to haute cuisine, Canada's culinary scene has emerged as **world-class**. Travellers can experience culinary classes, festivals, breweries, wineries and restaurants where they can **indulge in truly local dishes and drinks** that look as good as they taste.



### Engaging Road Trips

Touring through Canada is safe, accessible, and a great way to see the best Canada has to offer. Not only is **exploring multiple destinations** in one trip doable, but the journey between cities is littered with incredible natural wonders, breathtaking scenery, iconic attractions, and friendly locals.



# France Market Snapshot

Although interest in visiting Quebec has declined since 2016, traveller interest is still concentrated in Quebec.



Arrivals to Canada in 2017

**574.4K**

Inbound Travel to Canada  
Market Rank

**#4**

Average Length of Stay  
(Nights)

**13.0**

Average Spend Per Visitor  
(Excluding Air)

**\$1,778**

YOY Arrivals  
(2017 vs. 2016)

**↑ 5%**

YTD Arrivals  
(2018 vs. 2017; YTD July)

**↑ 6%**

## Indigenous Tourism Opportunity

TRAVELLERS IN THE PAST 3 YEARS  
THAT TOOK PART IN AN INDIGENOUS  
EXPERIENCE

**37%**

% OF MARKET INTERESTED IN  
INDIGENOUS CULTURAL EXPERIENCES

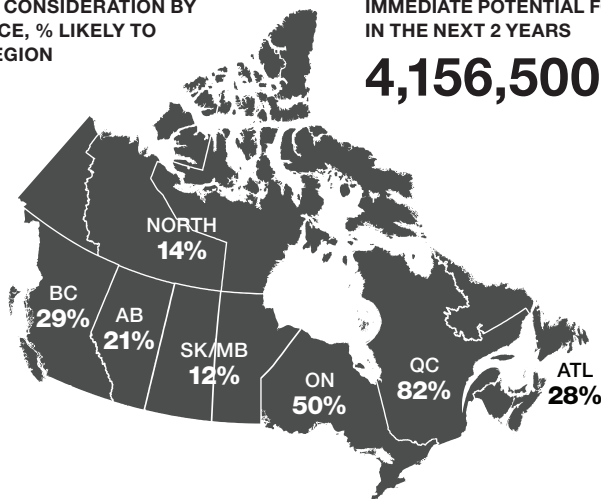
**63%**

IMMEDIATE POTENTIAL FOR  
INDIGENOUS TOURISM IN THE  
NEXT 2 YEARS

**2,618,500**



TRAVEL CONSIDERATION BY  
PROVINCE, % LIKELY TO  
VISIT REGION



IMMEDIATE POTENTIAL FOR CANADA  
IN THE NEXT 2 YEARS

**4,156,500**



Top 10 Activities of Interest

- 1 Hiking or walking in nature
- 2 Trying local food and drink
- 3 **Exploring aboriginal culture, traditions or history**
- 4 Natural attractions like mountains or waterfalls
- 5 Nature parks
- 6 Historical, archaeological or world heritage sites
- 7 Exploring places most tourists won't go to
- 8 Guided city tours
- 9 Northern lights
- 10 Fine dining



## The France Traveller Types

Destination Canada research shows that these two types of travellers are most likely to consider immediate travel to Canada.



### CULTURAL EXPLORERS 25-44

#### What do they want out of their travel?

French Cultural Explorers 25-44 are looking for control in their travels - they are less risk averse and looking for controlled spontaneity. They are comfortable living outside their comfort zones, and are thrilled by trying new things, and exploring places “off the beaten path”. They are looking to sample different cultures, and seek out new perspectives linked to their personal passions and interests.

#### What are their impressions of Canada?

Canada is seen as a place with beautiful outdoor scenery and friendly people. It's also seen as a safe place to visit and is perceived to offer distinctive experiences during all 4 seasons.

#### What stands in the way of them visiting?

Cost is the most significant barrier to visitation - 41% of travellers cited it as a barrier. A desire to visit other places, perceptions of poor weather and poor value for money are also top barriers to visitation.



### CULTURAL HISTORY BUFFS 45-64

#### What do they want out of their travel?

French Cultural History Buffs 45-64 prefer to have loose itineraries, and are comfortable adjusting with the unfamiliar. They have a desire to learn through travel, and achieve a deeper level of understanding and passion about culture through their experiences.

#### What are their impressions of Canada?

Canada is seen as a place with beautiful outdoor scenery that offers distinctive experiences during all 4 seasons. They perceive Canada to have people who are friendly and welcoming, and that it is a safe place to visit.

#### What stands in the way of them visiting?

Cost is the most predominant barrier to visitation, cited by more than 1/3 of French Cultural History Buffs 45-64. A desire to visit other places, poor value for money and perception that the flight is too far/long are also top barriers, but are not as significant as cost.





## Activities and Experiences Most Appealing to the French Traveller

Destination Canada has identified the kinds of experiences these visitors are looking for. You can use these themes to make your experience more appealing to travellers from France, or find ways to partner with other businesses to target the customer.

Our Content Themes are developed at a Global level, and adapted for market relevance. The themes ensure our Brand Position and Editorial Vision are aligned to the interests and travel motivators of our target audience.

### Average Booking Lead Time

<b>WINTER</b> <b>47</b> DAYS	<b>SPRING</b> <b>42</b> DAYS
<b>SUMMER</b> <b>85</b> DAYS	<b>FALL</b> <b>44</b> DAYS



### Vibrant Cities

Canada's **welcoming, multicultural cities** fuse history, culture, cuisine, nightlife, and nature into unique neighbourhoods. Travellers can **pursue their passions** with a Canadian twist and **live the local experience** in trendy urban centres.



### Natural Wonders on a Canadian Scale

Often only minutes from major cities (and sometimes, within them), travellers to Canada will find **stunning, majestic natural wonders** and wilderness. Experience the **Indigenous connection to nature**, and outdoor activities that **push personal limits**.



### Incomparable Culture & Heritage

In Canada, travellers will discover **multiculturalism** done right. **Indigenous and European history**, including a strong French influence, is weaved together with countless global cultures, creating a beautiful **cultural mosaic** reflected in vibrant, diverse neighbourhoods, delicious ethnic cuisine from all corners of the world, and countless arts and culture festivals and initiatives.



### Memorable Food & Drink

There's a taste in Canada that is distinct and defining, inspired by our natural bounty of ingredients and cultural diversity. In **cities overflowing with great restaurants**, travellers can delight their taste buds with countless local dishes and drinks that just **can't be found in France**.



### Engaging Road Trips

Journeying between regions is the best way to **discover Canada freely**. Dare to explore **beyond Quebec**, and discover vibrant cities, epic natural wonders, cultural & heritage attractions, captivating communities, and **friendly locals who welcome visitors** and share an insider's perspective on how and where to travel.



# Germany Market Snapshot

German long haul travellers are most interested in visiting Ontario, Quebec, British Columbia and Alberta; natural attractions are a draw.



Arrivals to Canada in 2017

**370.9K**

Inbound Travel to Canada  
Market Rank

**#5**

Average Length of Stay  
(Nights)

**14.9**

Average Spend Per Visitor  
(Excluding Air)

**\$2,293**

YOY Arrivals  
(2017 vs. 2016)

**↑ 5%**

YTD Arrivals  
(2018 vs. 2017; YTD July)

**↑ 7%**

## Indigenous Tourism Opportunity

TRAVELLERS IN THE PAST 3 YEARS  
THAT TOOK PART IN AN INDIGENOUS  
EXPERIENCE

**33%**

% OF MARKET INTERESTED IN  
INDIGENOUS CULTURAL EXPERIENCES

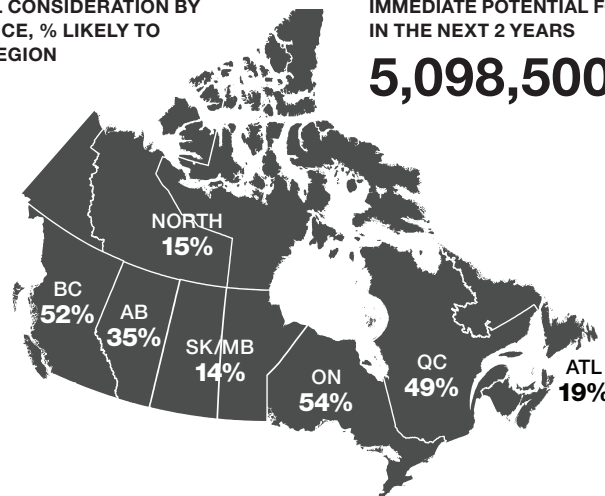
**47%**

IMMEDIATE POTENTIAL FOR  
INDIGENOUS TOURISM IN THE  
NEXT 2 YEARS

**2,396,500**



TRAVEL CONSIDERATION BY  
PROVINCE, % LIKELY TO  
VISIT REGION



IMMEDIATE POTENTIAL FOR CANADA  
IN THE NEXT 2 YEARS

**5,098,500**



## Top 10 Activities of Interest

- 1 Trying local food and drink
- 2 Hiking or walking in nature
- 3 Natural attractions like mountains or waterfalls
- 4 Nature parks
- 5 Viewing wildlife or marine life
- 6 Exploring aboriginal culture, traditions or history**
- 7 Exploring places most tourists won't go to
- 8 Historical, archaeological or world heritage sites
- 9 Food and drink festivals or events
- 10 City green spaces like parks or gardens



## The Germany Traveller Types

Destination Canada research shows that these two types of travellers are most likely to consider immediate travel to Canada.



### LEARNERS 25-34

#### What do they want out of their travel?

They are understated travellers, looking for authentic experiences and any opportunity to embrace, immerse and discover themselves in the culture, people and settings of the places they visit. They appreciate spontaneity, and unstructured travel, enjoying unexpected events and surprises that take them out of their everyday routine. They love to learn about and absorb themselves in the culture, history and social ambiance of the places they visit - being mistaken for a local is something they strive to achieve.

#### What are their impressions of Canada?

Canada is perceived to be a destination with beautiful outdoor scenery, landscapes and wildlife. Canada is also seen as a friendly, safe place. Generally, Learners have a larger appetite than other 25-34 travellers for outdoor activities - Canada's ability to deliver on these experiences is a draw.

#### What stands in the way of them visiting?

Cost is the largest barrier to visitation - 41% of Learners 25-34 believe cost is a factor that could discourage them from visiting Canada. Travellers need to feel confident that they are going to get good value out of a trip to Canada before making the commitment.



### FREE SPIRITS 45-64

#### What do they want out of their travel?

They are highly social and open-minded travellers who seek experimental and adventurous activity. They seek out experiences that they can not only share with others, but that also say something about them as travellers. They want to disconnect from their everyday responsibilities, relax, and spread their time over "must see" experiences. Though they demand authentic experiences, they touch on these experiences superficially - it's as much about the story as it is immersion.

#### What are their impressions of Canada?

Canada is known for its nature and scenery, as well as a destination that has multiple points of interest to travel to. Canada is perceived as a safe place with friendly people, offering opportunities to de-stress and having adventures that everyone can enjoy. Canada is on their "bucket list" - it's a place they've always wanted to visit.

#### What stands in the way of them visiting?

German Free Spirits 45-64 are sensitive to cost and time (distance, flight time, and time to take a vacation). Despite Canada ranking high on travellers' list of places to visit, it is in competition with the United States, Australia and New Zealand for consideration.



## Activities and Experiences Most Appealing to the Germany Traveller

Destination Canada has identified the kinds of experiences these visitors are looking for. You can use these themes to make your experience more appealing to travellers from Germany, or find ways to partner with other businesses to target the customer.

Our Content Themes are developed at a Global level, and adapted for market relevance. The themes ensure our Brand Position and Editorial Vision are aligned to the interests and travel motivators of our target audience.

### Average Booking Lead Time

<b>WINTER</b> <b>39</b> DAYS	<b>SPRING</b> <b>51</b> DAYS
<b>SUMMER</b> <b>103</b> DAYS	<b>FALL</b> <b>54</b> DAYS



### Vibrant Cities

Vibrant, multicultural urban centres are the best places to **rub shoulders with friendly Canadians**. In our welcoming neighbourhoods, culinary hotspots, museums, historical sites, festivals, and green spaces help travellers **authentically connect with locals**.



### Natural Wonders on a Canadian Scale

Canada is made for the outdoor adventurer. A vast and varied nation with pristine, **awe-inspiring nature around every corner**, travellers can fulfill their wanderlust as they experience three coasts, the Rocky Mountains, the Prairies and the Great Lakes, and **majestic wildlife**.



### Incomparable Culture & Heritage

In Canada, travellers will discover **multicultural, historical and cultural icons** showcased in modern ways. **Progressive experiences** of Indigenous culture, contemporary cuisine made with local ingredients, and uniquely Canadian design highlight this accessible heritage.



### Memorable Food & Drink

Canada's **natural bounty of ingredients** encourages local chefs to be mindful of their rich environment and explore their creativity through local and authentic dining experiences that **you just can't experience in Germany**.



### Engaging Road Trips

When travelling in Canada, "getting there" is often just as rewarding as "being there." Not only is exploring multiple destinations in one trip doable, but the journey between cities is littered with incredible **natural wonders, breathtaking scenery, iconic attractions, and friendly locals**.





# UK Market Snapshot

UK travellers are interested in visiting many parts of Canada; interest in Western Canada is growing.



Arrivals to Canada in 2017

**763.7K**

Inbound Travel to Canada  
Market Rank

**#2**

Average Length of Stay  
(Nights)

**9.8**

Average Spend Per Visitor  
(Excluding Air)

**\$1,792**

YOY Arrivals  
(2017 vs. 2016)

↓ **4%**

YTD Arrivals  
(2018 vs. 2017; YTD July)

↓ **2%**

## Indigenous Tourism Opportunity

TRAVELLERS IN THE PAST 3 YEARS  
THAT TOOK PART IN AN INDIGENOUS  
EXPERIENCE

**19%**

% OF MARKET INTERESTED IN  
INDIGENOUS CULTURAL EXPERIENCES

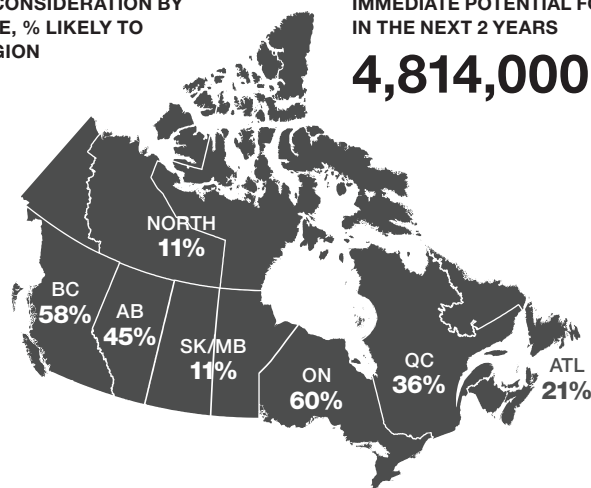
**37%**

IMMEDIATE POTENTIAL FOR  
INDIGENOUS TOURISM IN THE  
NEXT 2 YEARS

**1,781,000**



TRAVEL CONSIDERATION BY  
PROVINCE, % LIKELY TO  
VISIT REGION



IMMEDIATE POTENTIAL FOR CANADA  
IN THE NEXT 2 YEARS

**4,814,000**



## Top 10 Activities of Interest

- 1 Trying local food and drink
- 2 Natural attractions like mountains or waterfalls
- 3 Viewing wildlife or marine life
- 4 Nature parks
- 5 Historical, archaeological or world heritage sites
- 6 Northern lights
- 7 City green spaces like parks or gardens
- 8 Hiking or walking in nature
- 9 Art galleries or museums
- 10 Guided city tours

Out of 46 activities, interest in  
*Exploring aboriginal culture, traditions  
or history* ranked **#13**



## The UK Traveller Types

Destination Canada research shows that these two types of travellers are most likely to consider immediate travel to Canada.



### FREE SPIRITS 25-34

#### What do they want out of their travel?

They are looking for the “it” location to visit, and want to sample everything they can while there. Being able to say “I did that” is more important than deeply immersing oneself in the local culture - they gain currency and/or value out of their trip based on the number of things they can do. Nearly 40% of Free Spirits 25-34 indicated that they would choose their vacation based on a “great deal.”

#### What are their impressions of Canada?

Canada is seen as a friendly, safe place with beautiful outdoor scenery. It's seen as a place where you can get it all - great outdoor experiences and city activities. Canada is believed to be a place where travellers can do things they can't at home, such as appealing winter activities.

#### What stands in the way of them visiting?

Cost is the most significant barrier for UK Free Spirits 25-34. Relative to the next most significant barrier (flight too far), cost is more than 2x as significant as a barrier.



### LEARNERS 55+

#### What do they want out of their travel?

UK Learners 55+ anchor their trips around places that have interesting natural attractions, heritage sites and wildlife. Compared to other 55+ UK travellers, they are more motivated to travel somewhere if it's somewhere they always wanted to visit. They are also driven by destinations that offer cultural experiences that are aligned to their interests.

#### What are their impressions of Canada?

UK Learners 55+ perceive Canada as a place to experience and see the outdoors. They feel that they will be welcomed here - Canada is believed to be a safe place with friendly & welcoming people. Canada is also believed to be a great place to tour multiple destinations - road trips are a top trip anchor activity.

#### What stands in the way of them visiting?

Though cost is a top barrier, Learners 55+ are less cost-sensitive relative to other UK travellers. As a vacation destination, Canada often loses out to other destinations that are perceived to offer more of what UK Learners 55+ are looking for.



## Activities and Experiences Most Appealing to the UK Traveller

Destination Canada has identified the kinds of experiences these visitors are looking for. You can use these themes to make your experience more appealing to travellers from the UK, or find ways to partner with other businesses to target the customer.

Our Content Themes are developed at a Global level, and adapted for market relevance. The themes ensure our Brand Position and Editorial Vision are aligned to the interests and travel motivators of our target audience.

### Average Booking Lead Time

<b>WINTER</b> <b>39</b> DAYS	<b>SPRING</b> <b>41</b> DAYS
<b>SUMMER</b> <b>57</b> DAYS	<b>FALL</b> <b>39</b> DAYS



### Vibrant Cities

Canada's **youthful energy** comes to life in our thriving, multicultural cities and trendy regional hubs. UK visitors can rub shoulders with **friendly and welcoming locals** while experiencing urban centres **connected to breathtaking nature**.



### Natural Wonders on a Canadian Scale

Welcome to the stunning beauty of Canada's outdoors. Here, the majestic scale of our geography inspires **exhilarating and unique adventures**. The changing seasons provide year-round opportunities to experience destinations where a traveller's **free spirit soars**.



### Incomparable Culture & Heritage

In Canada, welcoming locals will help you connect with the country's progressive culture. From historical and Indigenous sites, to museums and galleries, visitors **discover and share in** the energy that is at the heart of our country.



### Memorable Food & Drink

There's a taste in Canada that is distinct and defining, inspired by our natural bounty of ingredients. Travellers discover distinctive farm-to-table dining and local wineries, distilleries, and breweries that deliver authentic flavours that **can only be found in Canada**.



### Engaging Road Trips

Journeying between regions is the best way to **discover Canada freely**. Experience vibrant cities, epic natural wonders, iconic cultural & heritage attractions, captivating communities, and like-minded locals who welcome visitors and share an insider's perspective on how and where to travel.



# India Market Snapshot

Indian travellers are most interested in visiting Ontario and British Columbia.



Arrivals to Canada in 2017

**250K**

Inbound Travel to Canada  
Market Rank

**#10**

Average Length of Stay  
(Nights)

**11.6**

Average Spend Per Visitor  
(Excluding Air)

**\$1,793**

YOY Arrivals  
(2017 vs. 2016)

**↑ 18%**

YTD Arrivals  
(2018 vs. 2017; YTD July)

**↑ 8%**

## Indigenous Tourism Opportunity

TRAVELLERS IN THE PAST 3 YEARS  
THAT TOOK PART IN AN INDIGENOUS  
EXPERIENCE

**33%**

% OF MARKET INTERESTED IN  
INDIGENOUS CULTURAL EXPERIENCES

**31%**

IMMEDIATE POTENTIAL FOR  
INDIGENOUS TOURISM IN THE  
NEXT 2 YEARS

**913,000**



TRAVEL CONSIDERATION BY  
PROVINCE, % LIKELY TO  
VISIT REGION



IMMEDIATE POTENTIAL FOR CANADA  
IN THE NEXT 2 YEARS

**2,945,000**



Top 10 Activities of Interest

- 1 Nature parks
- 2 Natural attractions like mountains or waterfalls
- 3 Hiking or walking in nature
- 4 Camping
- 5 Viewing wildlife or marine life
- 6 Shopping for items that help me remember my trip
- 7 Trying local food and drink
- 8 Amusement or theme parks
- 9 Historical, archaeological or world heritage sites
- 10 Nightlife

Out of 46 activities, interest in  
*Exploring aboriginal culture, traditions  
or history* ranked **#27**





## The India Traveller Types

Destination Canada research shows that these two types of travellers are most likely to consider immediate travel to Canada.



### HIGH INCOME TRAVELLERS 25-44

#### What do they want out of their travel?

Indian high income Travellers 25-44 are looking to visit places that are easy to travel from where they live. They desire to travel to places that allow them to tour multiple destination easily, and that offer great dining and shopping. They are also looking for distinctive experiences during all 4 seasons.

#### What are their impressions of Canada?

Canada is perceived as a safe place to visit, and a destination with beautiful scenery and landscapes. Canada is also seen as a destination that offers good value for money - especially important among a traveller group that cites cost as a top barrier to visitation.

#### What stands in the way of them visiting?

Cost, safety concerns, visa requirements, and length of flight are all top barriers of visitation - one-quarter of Indian High Income Travellers 25-44 cite at least one of these as a barrier to visitation.



### HIGH INCOME TRAVELLERS 55-64

#### What do they want out of their travel?

Indian high income Travellers 54-64 are looking to see wildlife in their natural habitat, and are also looking for distinctive experiences during all 4 seasons.

#### What are their impressions of Canada?

As with the younger cohort, Canada is perceived among Indian High Income Travellers 55-64 as a safe place to visit, and a destination with beautiful scenery and landscapes. Canada is also seen as a great place for touring multiple destinations, and a great place to spend time with family and friends.

#### What stands in the way of them visiting?

Cost, flight length and weather are the top barriers to visiting Canada. Nearly 30% of Indian High Income Travellers 45-64 cite cost as a barrier, and 1/4 believe that Canada is too far.



## Activities and Experiences Most Appealing to the India Traveller

Destination Canada has identified the kinds of experiences these visitors are looking for. You can use these themes to make your experience more appealing to travellers from India, or find ways to partner with other businesses to target the customer.

Our Content Themes are developed at a Global level, and adapted for market relevance. The themes ensure our Brand Position and Editorial Vision are aligned to the interests and travel motivators of our target audience.

### Average Booking Lead Time

WINTER 18 DAYS	SPRING 21 DAYS
SUMMER 22 DAYS	FALL 15 DAYS



### Vibrant Cities

Canada's trendy cities and welcoming neighbourhoods are filled with **authentic experiences** created and curated by **cool, friendly Canadians**. Travellers can live large, enjoying art galleries, local cuisine, and great shopping, all in proximity to nature.



### Natural Wonders on a Canadian Scale

Welcome to the stunning beauty of Canada's outdoors. Here, **photo-worthy scenery and wildlife** inspire **exhilarating and unique adventures**. The changing seasons provide year-round entertainment for travellers who wish to **experience Canada the way Canadians do**.



### Incomparable Culture & Heritage

Canadian culture weaves together **fascinating Indigenous and European history**, our love for nature, and **multiculturalism**. Experience the art, history, architecture, and fashion, and come away with **brag-worthy, uniquely Canadian** photos, decorations, and outfits for friends and family.



### Memorable Food & Drink

There's a taste in Canada that is distinct and defining, inspired by our **natural bounty of ingredients**. Travellers can experience culinary classes and festivals, or discover distinctive farm-to-table dining and local wineries, distilleries, and breweries that deliver authentic flavours.



### Engaging Road Trips

Touring through Canada is **safe, accessible**, and a great way to see the best Canada has to offer with your friends and family. Not only is **exploring multiple destinations** in one trip doable, but the journey between cities is littered with incredible natural wonders, breathtaking scenery, iconic attractions, and friendly locals.



# Mexico Market Snapshot

Mexican travellers show highest interest in visiting Ontario, Quebec, and British Columbia.



Arrivals to Canada in 2017

**344.2K**

Inbound Travel to Canada  
Market Rank

**#7**

Average Length of Stay  
(Nights)

**9.3**

Average Spend Per Visitor  
(Excluding Air)

**\$1,792**

YOY Arrivals  
(2017 vs. 2016)

**↑ 47%**

YTD Arrivals  
(2018 vs. 2017; YTD July)

**↑ 3%**

## Indigenous Tourism Opportunity

TRAVELLERS IN THE PAST 3 YEARS  
THAT TOOK PART IN AN INDIGENOUS  
EXPERIENCE

**28%**

% OF MARKET INTERESTED IN  
INDIGENOUS CULTURAL EXPERIENCES

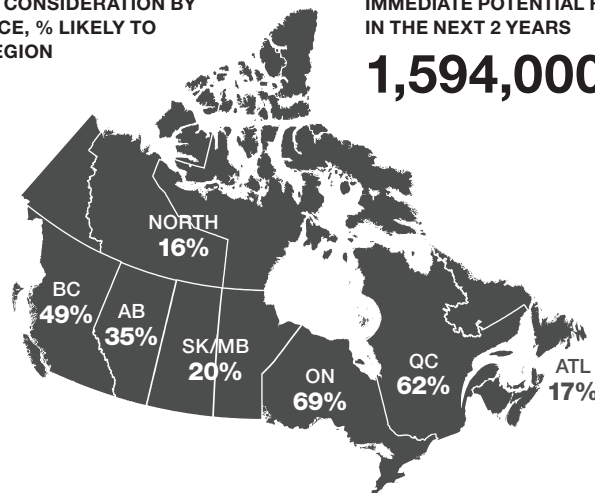
**43%**

IMMEDIATE POTENTIAL FOR  
INDIGENOUS TOURISM IN THE  
NEXT 2 YEARS

**685,500**



TRAVEL CONSIDERATION BY  
PROVINCE, % LIKELY TO  
VISIT REGION



IMMEDIATE POTENTIAL FOR CANADA  
IN THE NEXT 2 YEARS

**1,594,000**



Top 10 Activities of Interest

- 1 Trying local food and drink
- 2 Nature parks
- 3 Natural attractions like mountains or waterfalls
- 4 Northern lights
- 5 Fine dining
- 6 Hiking or walking in nature
- 7 Art galleries or museums
- 8 Historical, archaeological or world heritage sites
- 9 City green spaces like parks or gardens
- 10 Nightlife

Out of 46 activities, interest in  
*Exploring aboriginal culture, traditions  
or history* ranked **#17**



## The Mexico Traveller Types

Destination Canada research shows that these two types of travellers are most likely to consider immediate travel to Canada.



### **AUTHENTIC EXPERIENCERS 18-34**

#### **What do they want out of their travel?**

Mexican Authentic Experiencers 18-34 have a desire to immerse themselves in local life, and meet new people to share in experiences they can't do at home. They are motivated by good value - being able to do and see a lot, tour multiple destinations and experience both nature and city experiences during their trip is a motivator for visitation. They want to challenge themselves by doing things they can't do at home, at their own pace.

#### **What are their impressions of Canada?**

Canada is seen as a place with beautiful outdoor scenery and landscapes. Canada's people are also a positive draw - 42% of Mexican Authentic Experiencers aged 18-34 believe Canada has friendly and welcoming people. Canada is also seen as a safe place to visit, with great winter outdoor activities that they would participate in.

#### **What stands in the way of them visiting?**

Cost is the largest barrier to visitation, cited by nearly half of all 18-34 Mexican Authentic Experiencers. Legacy perceptions of visa requirements and an unfavourable exchange rate are also top barriers to visitation.



### **FREE SPIRITS 35-54**

#### **What do they want out of their travel?**

Mexican Free Spirits 35-54 are social samplers - they want to see and try a variety of things in the destinations they visit. Finding things they can't do at home is closely linked to feelings of pride, which is a top motivator of travel. They want to disconnect from their responsibilities at home, seeking experiences they can share with others.

#### **What are their impressions of Canada?**

Canada is seen as a safe place with beautiful outdoor scenery and landscapes. Nearly half of Mexican Free Spirits 35-54 believe that Canada is a place that they would be proud to tell people they have visited.

#### **What stands in the way of them visiting?**

Cost and visa requirements are top barriers to visitation, cited by around 1/3 of Mexican Free Spirits 35-54. Poor weather and unfavourable exchange rates were also cited as top barriers to visitation.



## Activities and Experiences Most Appealing to the Mexico Traveller

Destination Canada has identified the kinds of experiences these visitors are looking for. You can use these themes to make your experience more appealing to travellers from Mexico, or find ways to partner with other businesses to target the customer.

Our Content Themes are developed at a Global level, and adapted for market relevance. The themes ensure our Brand Position and Editorial Vision are aligned to the interests and travel motivators of our target audience.

### Average Booking Lead Time

WINTER 31 DAYS	SPRING 28 DAYS
SUMMER 33 DAYS	FALL 23 DAYS



### Vibrant Cities

Canada's trendy cities and **welcoming neighbourhoods** are filled with **authentic experiences** created and curated by **cool, friendly Canadians**. Travellers can live large, enjoying art galleries, local cuisine, and great shopping, all in proximity to nature.



### Natural Wonders on a Canadian Scale

The majestic scale of the Canadian outdoors provide travellers with **an accessible playground** to easily experience everything from amazing skiing to tranquil hikes, all while taking in the stunning scenery. The changing seasons provide **year-round entertainment** for those who wish to **truly immerse themselves** in Canada's natural beauty.



### Incomparable Culture & Heritage

Make friends with Canada's **welcoming locals** who are building Canadian culture through festivals, arts, gastronomy, design, architecture, and more. Visit museums, galleries, and restaurants to **discover and share in** the energy that is at the heart of our country.



### Memorable Food & Drink

Multicultural cuisine made from **premium ingredients** is at the heart of Canada's **surprising culinary scene**. Explore new tastes and flavours in cooking classes, at food festivals, in wineries and breweries, or in any of the countless **world-class restaurants** putting Canada on the map.



### Engaging Road Trips

Journeying between regions is the best way to **discover Canada freely**. Experience vibrant cities, epic natural wonders, iconic cultural & heritage attractions, captivating communities, and **like-minded locals who welcome visitors** and share an insider's perspective on how and where to travel.





# United States Market Snapshot

US travellers are most interested in visiting Ontario, followed by British Columbia and Quebec. Toronto, Niagara Falls, Montréal and Vancouver feature as the most sought after destinations.



Arrivals to Canada in 2017

**14.3M**

Inbound Travel to Canada  
Market Rank

**#1**

Average Length of Stay  
(Nights)

**4.2**

Average Spend Per Visitor  
(Excluding Air)

**\$738**

YOY Arrivals  
(2017 vs. 2016)

**↑ 3%**

YTD Arrivals  
(2018 vs. 2017; YTD July)

**↑ 1%**

## Indigenous Tourism Opportunity

TRAVELLERS IN THE PAST 3 YEARS  
THAT TOOK PART IN AN INDIGENOUS  
EXPERIENCE

**18%**

% OF MARKET INTERESTED IN  
INDIGENOUS CULTURAL EXPERIENCES

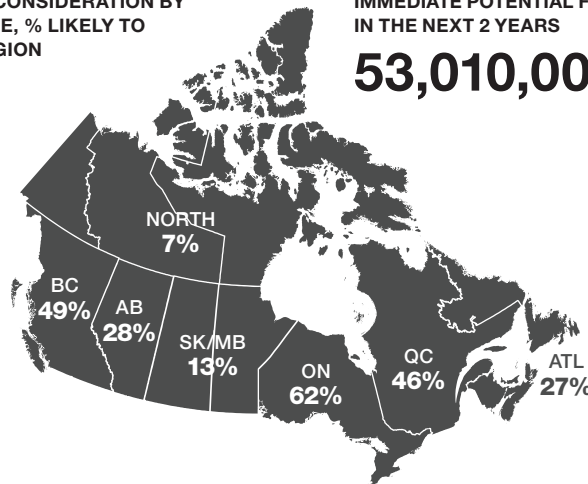
**33%**

IMMEDIATE POTENTIAL FOR  
INDIGENOUS TOURISM IN THE  
NEXT 2 YEARS

**17,493,500**



TRAVEL CONSIDERATION BY  
PROVINCE, % LIKELY TO  
VISIT REGION



IMMEDIATE POTENTIAL FOR CANADA  
IN THE NEXT 2 YEARS

**53,010,000**



Top 10 Activities of Interest

- 1 Trying local food and drink
- 2 Natural attractions like mountains or waterfalls
- 3 Nature parks
- 4 Hiking or walking in nature
- 5 Historical, archaeological or world heritage sites
- 6 Viewing wildlife or marine life
- 7 Food and drink festivals or events
- 8 Northern lights
- 9 Art galleries or museums
- 10 Shopping for items that help me remember my trip

Out of 46 activities, interest in  
*Exploring aboriginal culture, traditions  
or history* ranked **#20**



## The US Traveller Types

Destination Canada research shows that these two types of travellers are most likely to consider immediate travel to Canada.



### LEARNERS 25-44

#### What do they want out of their travel?

Learners are interested in growing through new experiences like travel. They want to immerse themselves in a unique culture, tour around a bit, soak in the atmosphere, have adventures, eat great food, challenge themselves, stimulate their intellect and tell people about their trip. They are confident enough to not need structured travel and like to explore places others won't go. Active outdoor adventures are more their style than high-end indulgence.

#### What are their impressions of Canada?

Canada is safe, friendly and full of the beauty of nature. But it has also been getting a lot of positive press recently when it comes to Canada's music scene, cities, food. It's on my list and I'll get around to it someday.

#### What stands in the way of them visiting?

Value perception is a barrier for Learners, and cost is only part of that equation. If we focus on making the experience we offer seem culturally different enough from the US to challenge them and stimulate some kind of personal growth we are more likely to be seen as more "worth it" than places currently above us on the list.



### FREE SPIRITS 25-44

#### What do they want out of their travel?

Free Spirits are impulsive and like to indulge themselves. They are status-oriented and constantly search for cultural currency they can share socially. They want to go to the new, hot destination before everyone else and brag about it. They want to try as many experiences as possible, both in cities and nature to get the most out of their trip. Challenging adventures and intellectually stimulating experiences meet their transformational travel needs.

#### What are their impressions of Canada?

Safe. Friendly. Not so different from home. Great nature and wildlife, a bit cold. It's on my list and I'll get around to it someday. It's not that far to go.

#### What stands in the way of them visiting?

Incredibly time-pressed and stressed, they may not even take that planned vacation. Instead, it will be a last minute thing. If you aren't top-of-mind when they grab that break you'll miss out. Canada lacks that compelling meaning that cuts through. But given how easy we are, to get to if we can get the right message to them as they are looking to book, we can improve urgency.



## Activities and Experiences Most Appealing to the US Traveller

Destination Canada has identified the kinds of experiences these visitors are looking for. You can use these themes to make your experience more appealing to travellers from the US, or find ways to partner with other businesses to target the customer.

Our Content Themes are developed at a Global level, and adapted for relevance per market. The themes ensure our Brand Position and Editorial Vision are relevant to travellers by aligning to their interests and motivators to travel, providing them an opportunity to find their True North in Canada.



### Courage to challenge yourself

Physical, intellectual and emotional challenges – pushing yourself to experience the world outside your comfort zone.



### Courage to make new connections

Making connections with Canadians of all backgrounds, experiencing their culture and perspectives, evolving your own.



### Courage to keep learning

Culinary and artistic experiences, learning new skills you can bring back to your everyday life.



### Courage to be yourself

Feeling free to step away from your everyday life and be who you really are in an open and welcoming culture.



### Courage to leave the city behind

Experiencing the transformative power of nature – the silence, grounding yourself, connecting to the natural world.



# Domestic Market Snapshot

## Indigenous Tourism Opportunity

TRAVELLERS IN THE PAST 3 YEARS  
THAT TOOK PART IN AN INDIGENOUS  
EXPERIENCE

**9%**

% OF MARKET INTERESTED  
IN INDIGENOUS CULTURAL  
EXPERIENCES

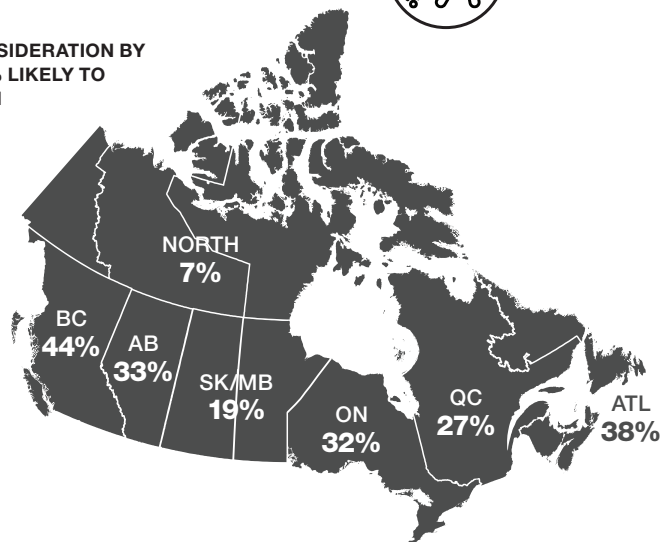
**27%**

IMMEDIATE POTENTIAL FOR  
INDIGENOUS TOURISM IN THE  
NEXT 2 YEARS

**2,584,000**



TRAVEL CONSIDERATION BY  
PROVINCE, % LIKELY TO  
VISIT REGION



IMMEDIATE POTENTIAL  
FOR CANADA IN THE  
NEXT 2 YEARS

**9,571,000**



## Top 10 Activities of Interest

- 1 Natural attractions like mountains or waterfalls
- 2 Trying local food and drink
- 3 Hiking or walking in nature
- 4 Historical, archaeological or world heritage sites
- 5 Nature parks
- 6 Viewing wildlife or marine life
- 7 Art galleries or museums
- 8 Food and drink festivals or events
- 9 City green spaces like parks or gardens
- 10 Northern lights

Out of 46 activities, interest in *Exploring aboriginal culture, traditions or history* ranked **#25**

Sources:  
Statistics Canada, International Travel Survey - Frontier Counts (Dec. 2017 and May 2018)  
Global Tourism Watch 2017, Destination Canada EQ Profiles



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