



2.5 million Australian long-haul leisure travellers intend to visit Canada in the next two years.

## 2018 Performance



2018 Arrivals<sup>1</sup>

**348,980**  
(↓2.5%)



2018 Average Trip Spend<sup>2</sup>

**\$2,433**

### Key Insights

- Australians are expanding their travel interest outside of Western Canada. Based on agency reported air ticket data, arrivals to Ontario, Quebec, Atlantic Canada and Northern Canada expanded at an above average rate between 2012 and 2018.<sup>6</sup>
- The weaker purchasing power of the Australian Dollar in Canada in 2018 (-3% compared to 2017) may have contributed to subdued arrivals, particularly via the US. Overall economic weakness is expected to weigh on consumer confidence.<sup>4</sup>
- Although there were fewer arrivals from Australia via the US in 2018, direct air arrivals were still ahead of 2017 (+6%), in line with expanded air capacity (+12%) resulting from new direct Air Canada flights between Melbourne and Vancouver.<sup>1,3</sup>

## 2019 Forecast



Visitor Forecast<sup>2</sup>

**352,120**  
(↑0.9%)



Spend Forecast (CAD)<sup>2</sup>

**\$837 M**  
(↑0.6%)



Air Seat Capacity Growth<sup>3</sup>

**↑7.0%**



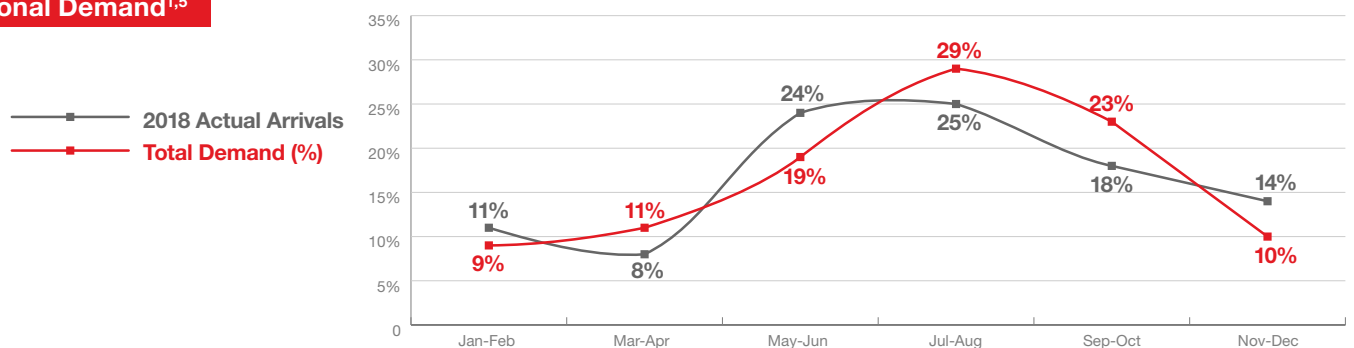
Local Currency vs. CAD<sup>4</sup>

**↓5.9%**

## Market Insights

- In 2018, Australian leisure travellers were most interested in visiting Canada during the summer (29% of travellers) and fall seasons (23%).<sup>5</sup>
- Top activities Australian leisure travellers want to do while on holiday include sampling local food and drink, immersing themselves in nature, seeing sites of historical significance and visiting city-based attractions such as city green spaces, art galleries and museums.<sup>5</sup>
- 1 in 4 Australians visiting Canada on their most recent long-haul leisure trip booked an organized group travel package via a travel agent or tour operator in-person.<sup>5</sup>

## Seasonal Demand<sup>1,5</sup>



<sup>1</sup> Statistics Canada, Frontier Counts, 2018.

<sup>2</sup> 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.

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

<sup>4</sup> Bank of Canada.

<sup>5</sup> Global Tourism Watch 2018.

<sup>6</sup> IATA Global Agency Pro.



**Market Potential<sup>5</sup>**



Canada's target market

**5,768,000**



**43%**

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



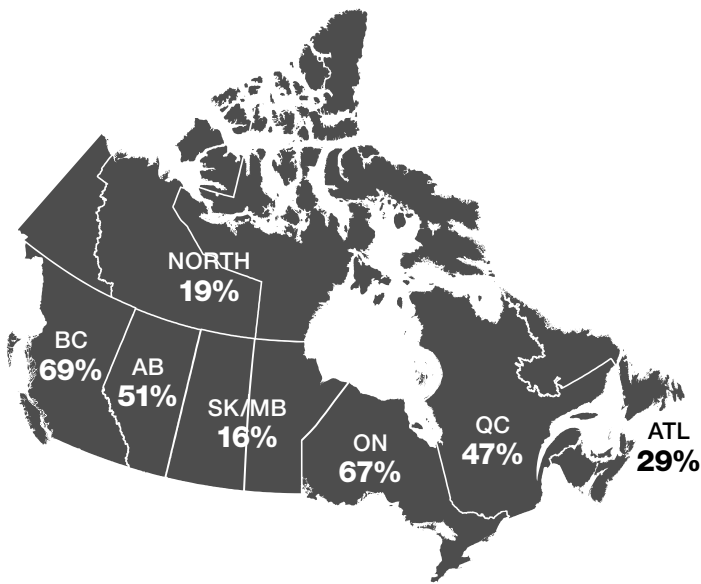
**2,474,500**

Canada's immediate potential

**Top Drivers for Australian Travellers to Any Destination<sup>5</sup>**

- 1** Is a place that allows me to de-stress
- 2** Has people that are friendly and welcoming
- 3** Is a place I would be proud to tell people I have visited
- 4** Is a place to spend quality time with friends and/or family
- 5** Its cities have a lot of great attractions to see and do
- 6** Has beautiful outdoor scenery and landscapes
- 7** Combines the best of both outdoor activities and city experiences
- 8** Has great shopping
- 9** Is a place that provides intellectually stimulating travel experiences
- 10** Is a great place for touring around to multiple destinations

**Travel Consideration by Province,  
% Likely to Visit Region<sup>5</sup>**



**Travel Agent/Tour Operator Usage  
For Recent Trip to Canada<sup>5</sup>**

Used for either research <u>or</u> booking	<b>69%</b>
Used for both research <u>and</u> booking	<b>38%</b>
Used for research <u>only</u>	<b>18%</b>
Used for booking <u>only</u>	<b>13%</b>

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<sup>5</sup> Global Tourism Watch 2018.