

2014 GATEWAY TO GROWTH

ANNUAL REPORT ON CANADIAN TOURISM: FOCUS ON THE US MARKET

TIAC AIMS TO REACH THE WORLD AVERAGE
VISITOR GROWTH RATE OF 5%

—○ By 2020 it could mean an additional ○—

**\$5B IN SPENDING AND
\$1.7B IN TAX REVENUE**

SINCE 2000 CANADA HAS LOST:

- 3M visitors/year (19.6M ⇨ 16.6M)
- Almost HALF its market share (2.8% ⇨ 1.5%)
- 9 places in global destination rankings (8th ⇨ 17th)
- 32% in visitor spending

FOCUS ON THE US MARKET

The US is a key component of the Canadian tourism industry as:

COMPETITOR · **CUSTOMER** · **OPPORTUNITY**

INTERNATIONAL ARRIVALS



26% DECREASE
in US overnight
★ visitors



TWO-NATION
VACATION

➤ 21% of overseas visitors
visit US first

3 OUT OF 4 VISITORS ARE AMERICAN

Increased passport ownership (100M+), recovering economy
and favourable exchange rate = **TIME IS RIGHT**

**IF WE REGAIN 2002
US OUTBOUND MARKET
SHARE OF 28%**

**= 4.7M MORE
US VISITORS**

**= 25% INCREASE IN
CANADA'S OVERALL
VISITATION**

CONNECTING AMERICA MARKETING PROPOSAL:

3 years x \$35M federal investment matched by industry to re-enter US leisure market

TO MEET THIS GOAL WE MUST ADDRESS THE FOLLOWING ISSUES:

M **MARKETING:** Strong national marketing campaigns work.

A **ACCESS:** Aviation costs and Visitor Documentation are some of the biggest barriers for travellers.

P **PRODUCT:** Tourism products that drive international visitation.
PEOPLE: Federal labour programs should reflect the unique nature of the industry.

READ THE FULL REPORT: TIAC.TRAVEL/PUBLICATIONS.HTM