



**DESTINATION
CANADA**





CONNECTING AMERICA



**DESTINATION
CANADA**

Program Overview

3 Year Initiative

Drive **680,000** Travellers to visit
Canada

Resulting in **\$400 Million**
in Visitor Spend



STRONGEST GROWTH IN OVER A DECADE



+8.1% Overnight Arrivals – All Modes



+9.3% Overnight Arrivals



+6.4% Overnight Arrivals

GOING INTO MARKET – SUMMER 2016

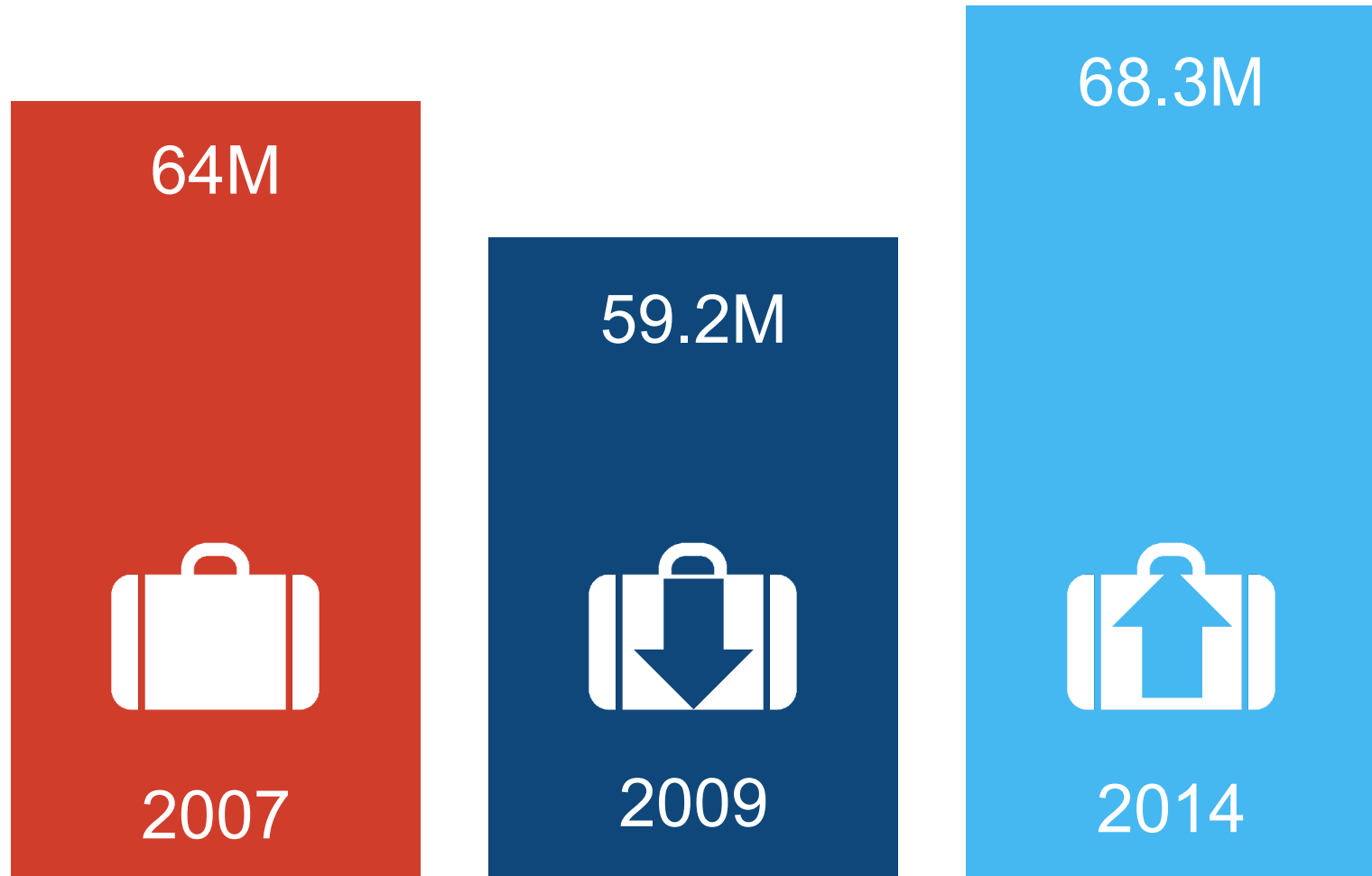




1

US Market Overview

US OUTBOUND TRAVEL AT AN ALL-TIME HIGH



Outbound trips (m)

A MARKET OF MANY MARKETS



81M ACTIVELY CONSIDERING A LEISURE
DESTINATION OUTSIDE OF THE US

A NEW TYPE OF TRAVELER

Travellers to Canada
are becoming **younger**



Becoming **more
hyper-connected.**



Expect brands to deliver **highly
personalized** recommendations,
experiences, and service



2

Our Customer's Perceptions of Canada



NEGATIVE PRECONCEPTIONS OF CANADA



**We're Too
Cold All
Year
Round**



**We Lack
Urban
Sophistication**



**We're Far
Away In
Their
Minds**



**We're
Costly**

WE NEED TO DISRUPT BRAND PERCEPTIONS

1. WE LIVE HERE

*Canada is
beauty only*



2. WE NEED TO BE HERE

*There is more
to Canada
than nature*



THEY NEED TO SEE
US THROUGH A
NEW LENS

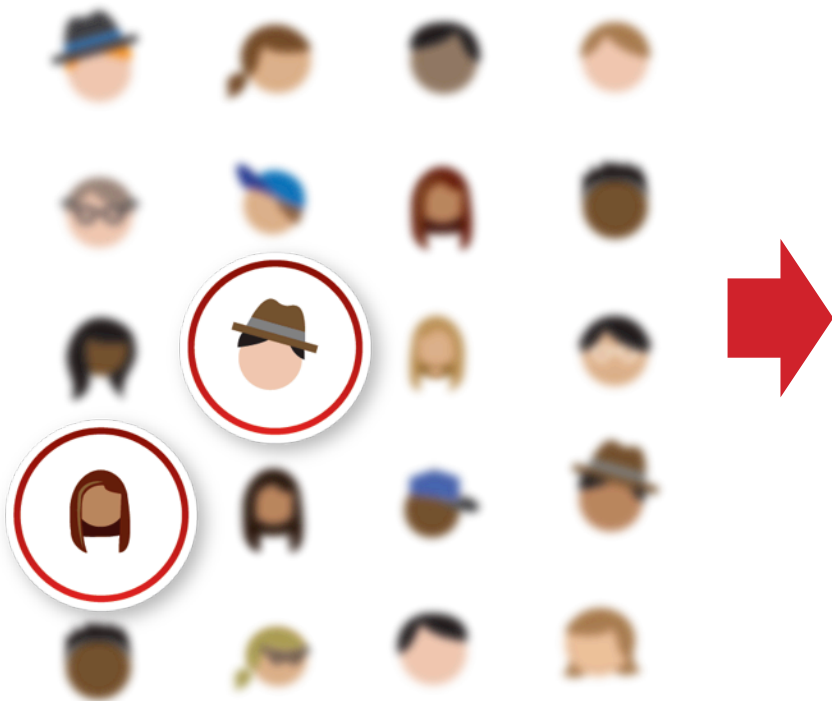


3

Finding Americans Leaning In – But Haven't Been



FINDING OUR CUSTOMER



- Hold a passport
- Have taken a leisure in the last year more than 200 miles from home
- Want to visit Canada next 2 years
- Already have some knowledge of vacation experiences in Canada
- Can access direct flights to multiple destinations in Canada

19 MILLION AMERICANS



19M AMERICANS LIVING IN US CITIES WANTING
TO VISIT CANADA IN THE NEXT 2 YEARS

OUR HIGHEST POTENTIAL CUSTOMER



WHAT THEY SHARE IN COMMON

Life's Explorers

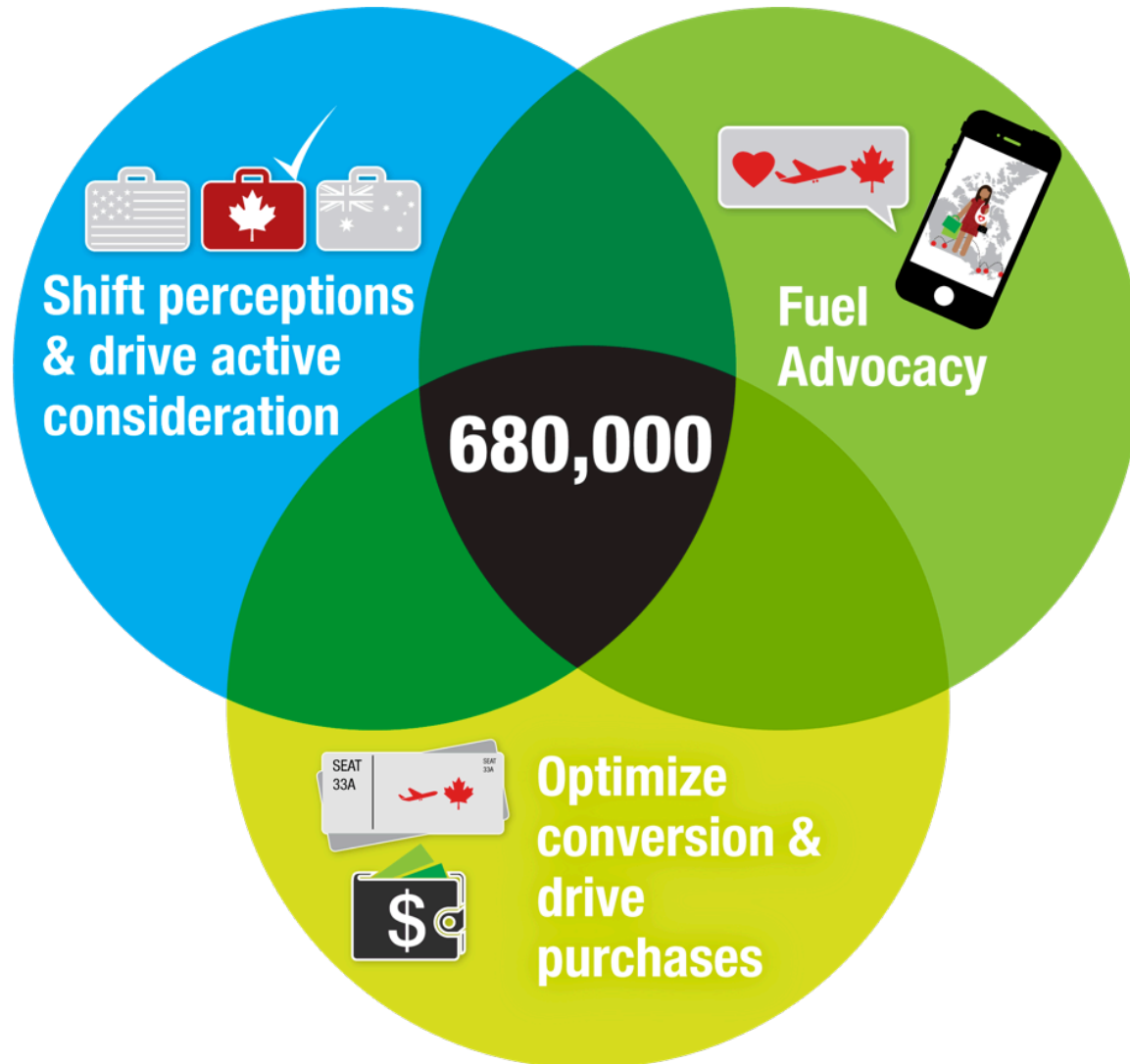
- Actively participate in life – don't sit on the sideline
- Curious, bold, always learning – pushing new boundaries
- Want to learn and soak in “local” experiences when they travel
- Choose destinations that are perceived as exciting – yet easy to enjoy

4

Our Engagement Strategy



OUR 3 YEAR STRATEGY



SUMMING IT UP





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CANADA**