



The United States remains Canada’s largest international market, leading both in visitor volume and total economic contribution.

- Spending by American travelers surpassed 2019 levels in 2023, while overnight visitor volumes are expected to fully recover in 2025. A strong US dollar in 2023 and 2024 has made Canada a more affordable and attractive destination.
- While the US economy is forecasted to grow in 2025, outlooks remain uncertain. Despite this, spending is projected to reach 139% of 2019 levels.
 - Visits from the US are forecasted to rise 8.0% in 2025 and another 5.4% in 2026.
 - By 2026, Canada is expected to welcome 16 million visitors from the US, generating \$16.7 billion in spending.

Spending and visitation levels (% relative to 2019)¹

	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030
Spend	100	13	17	66	115	127	139	150	161	169	175	182
Visitation	100	13	14	61	85	94	101	107	112	116	117	119

0%-50% 51%-75% 76%-100% 101%-120% 121%+

There is an unprecedented economic opportunity from a growing tourism industry, but there is significant potential for disruption in 2025. To remain resilient, our industry must reinforce that Canada remains open and friendly.

Potential Market Size²

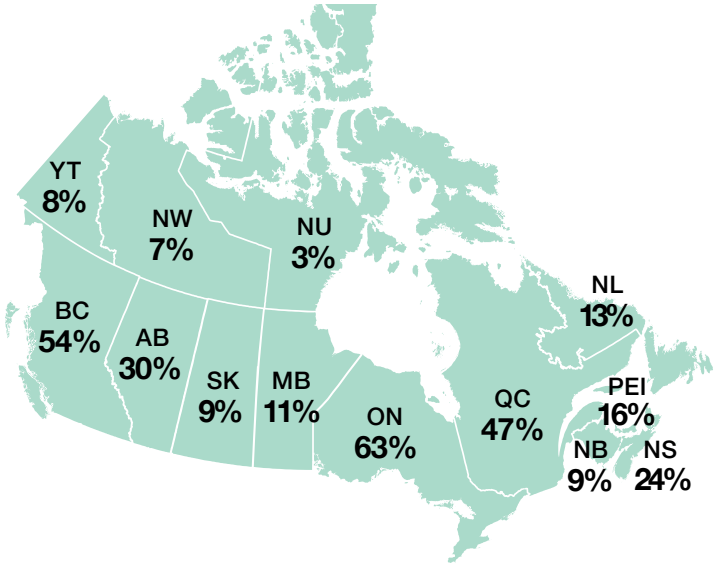


Total potential for long-haul travellers

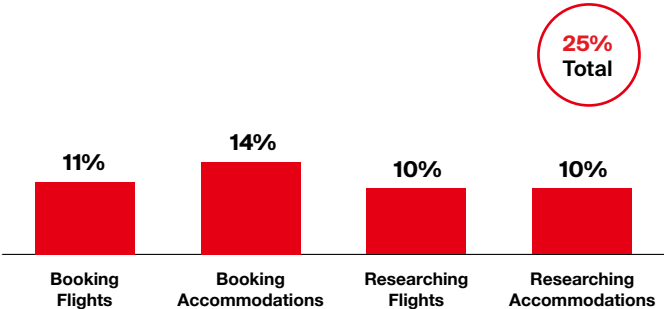


Canada's immediate potential

Likelihood to Visit Canadian Regions (Next 2 Years)



Use Travel Agent on Canada Trip²



The DC Tourism Outlook Fall 2023 has been adjusted from 2023 to 2025 to reflect the latest arrival numbers.

¹ Destination Canada Tourism Outlook 2025-2030
² Destination Canada Global Traveller Research Program 2024



In the US, there are three key priority segments selected through advanced analysis of their alignment to Canada’s product offerings, their potential economic impact, brand alignment, and their ability to benefit Canadian communities.



the US Priority Segment

REFINED GLOBETROTTERS

% Of the US Adult Population

10%

% Of the US Visitors to Canada

18%

% Of the US Spend to Canada

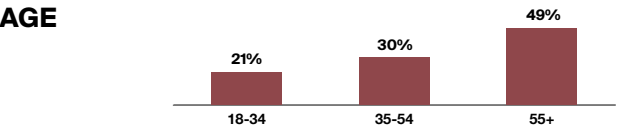
28%

We prioritize travel above all, indulging in world-class destinations, gourmet dining, and exclusive experiences. We are experienced travellers who are always on the lookout for new, unique places to cross of our list.

TOP CANADA ACTIVITIES

- Local Cuisine
- Cultural Experiences & Attractions
- Shopping
- Guided Tours
- Health & Wellness

Type of Travel Trade	Level of Use (compared to rest of market)
Travel Trade for group travel	★★★★★ (Very High)
Travel Trade for non-group travel	★★★★★ (Very High)





the US Priority Segment

OUTDOOR EXPLORERS

% Of the US Adult Population

13%

% Of the US Visitors to Canada

21%

% Of the US Spend to Canada

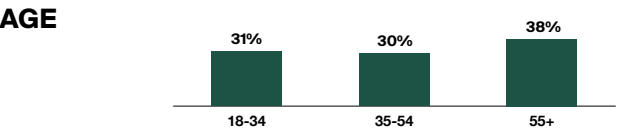
20%

We are nature explorers who crave the thrill of unknown landscapes and overcoming challenges. Adventure travel allows us to grow, learn new skills, and establish personal traditions.

TOP CANADA ACTIVITIES

- Nature Experiences
- High-intensity Sports
- Water / Winter Based Sports
- Casual Sports

Type of Travel Trade	Level of Use (compared to rest of market)
Travel Trade for group travel	★★★★☆ (Average)
Travel Trade for non-group travel	★★★★☆ (Average)





the US Priority Segment

CULTURE SEEKERS

% Of the US Adult Population

11%

% Of the US Visitors to Canada

20%

% Of the US Spend to Canada

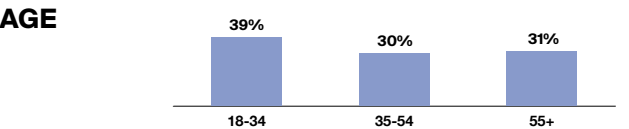
22%

We are sociable, free-spirited individuals who seek unique, authentic experiences and vibrant city life. We thrive on immersing ourselves in new perspectives, local culture & arts, and making connections, which boosts our energy and confidence.

TOP CANADA ACTIVITIES

- Local Cuisine
- Cultural Experiences & Attractions
- Festivals & Events
- Nightlife

Type of Travel Trade	Level of Use (compared to rest of market)
Travel Trade for group travel	★★★★☆ (Average)
Travel Trade for non-group travel	★★★★☆ (High)



Source: Destination Canada Traveller Segmentation Program 2024

Note: Segment sizing estimates will differ from those in the Global Traveller Research Program (GTRP), which applies stricter screening criteria—specifically a more narrowly defined long-haul traveller profile.

For further information, please contact:

Kyla Hochfilzer, Acting Senior Director, Global Marketing, North America

T +01-604-638-8364 | hochfilzer.kyla@destinationcanada.com