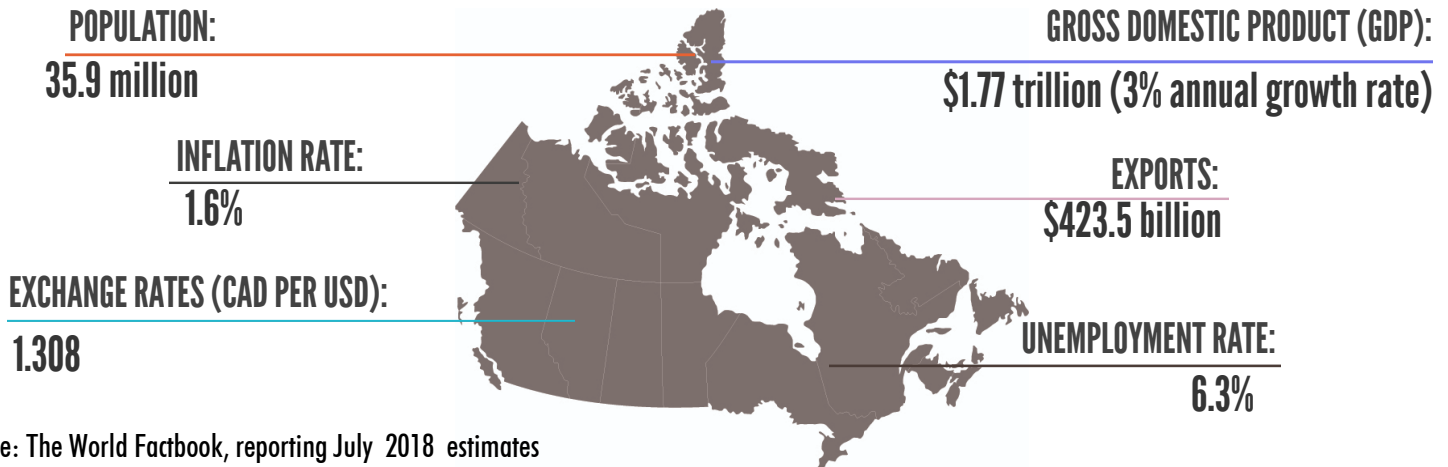


Canada Market Profile

This summary provides the most up-to-date data available on Canada as it relates to their people and economy, travel related motivations and planning behavior and Canadian visitor profile specific to Arizona.

GENERAL COUNTRY PROFILE



Source: The World Factbook, reporting July 2018 estimates

TRAVEL MOTIVATION AND PLANNING



Top Travel Activities

- 36%** Art and Culture
- 34%** Nature/Outdoors (National park, wildlife viewing)
- 26%** Recreation Sports (Hiking, Cycling, Fishing, etc.)



Sources Used to Plan Travel to U.S.

- 50%** Travel company/Booking websites (Expedia, hotels)
- 40%** Friends and family
- 38%** Destination website
- 28%** Social media (Facebook, Twitter, TripAdvisor)



Advance Decision Time

- 28%** Less than a month
- 16%** 1 to 2 months
- 24%** 2 to 3 months
- 31%** 3 to 12 months
- 1%** More than 1 year



Impacts Decision to Visit U.S.

- 61%** Exchange rate/Total cost
- 44%** Ease of crossing border
- 33%** U.S. political situation
- 26%** Concerns of weather (hurricane, fire)
- 22%** Concerns of crime
- 21%** Festivals/Events/Sports



Party Size of Immediate Travel Party

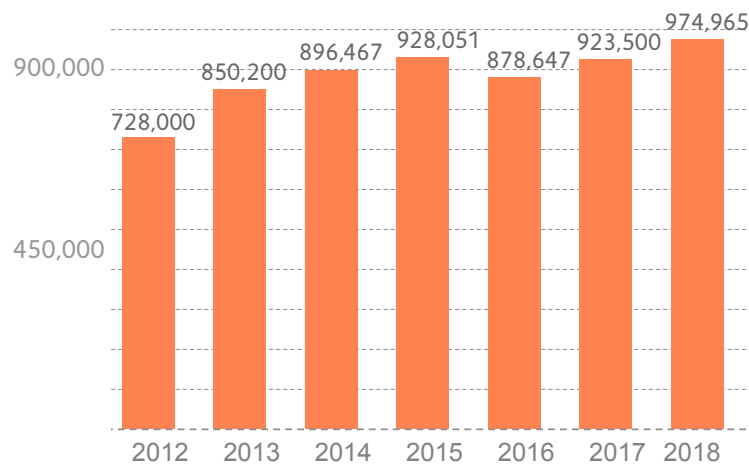
- 9%** 1 person
- 40%** 2 people
- 15%** 3 people
- 36%** 4+

Source: XBorder Canada, 2018 data

CANADIAN VISITATION TO ARIZONA



Visitation Volume to Arizona



Visitor Characteristics

15.3 Average Nights in U.S.

8.0 Median Nights in U.S.

3.5 persons Average Party Size



Mode of Entry

71% Airplane

28% Auto



Visitation by Province

32% Ontario

29% Alberta

23% British Columbia

7% Quebec

6% Manitoba

3% Saskatchewan

1% Atlantic Canada



Main Trip Reason

88% Leisure

44% Vacation/Holiday

26% Visiting Friends/Relatives

17% Other Leisure

8% Business

2% Meetings

1% Convention/Conference/Trade Show



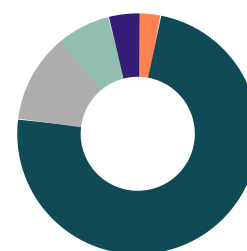
Visa Credit Card Travel Spending

Canadian Visa Card Spending ranked #1 in 2018 with 43% of total International Travel Spending in Arizona.

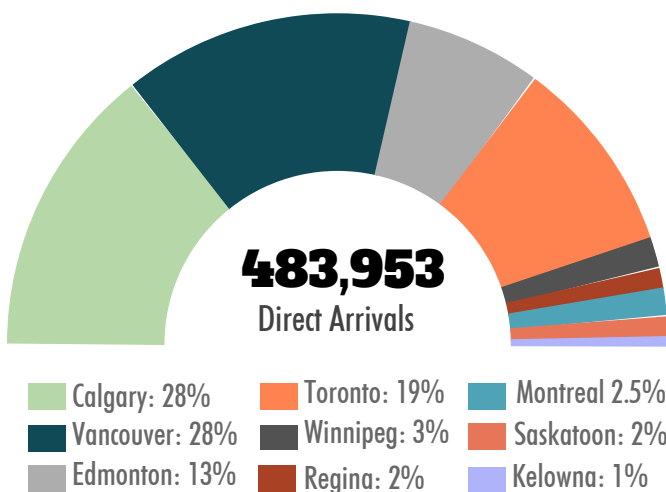
By Quarter



By Arizona Region



AZ Direct Arrivals from Canadian Cities



Source: Tourism Economics, reporting 2012-2018 data
 VisaVUE Travel, reporting 2018 data
 The Conference Board of Canada, 2018 data
 XBorder Canada, 2018 data