



INTERNATIONAL MARKET FOCUS

AUSTRALIA

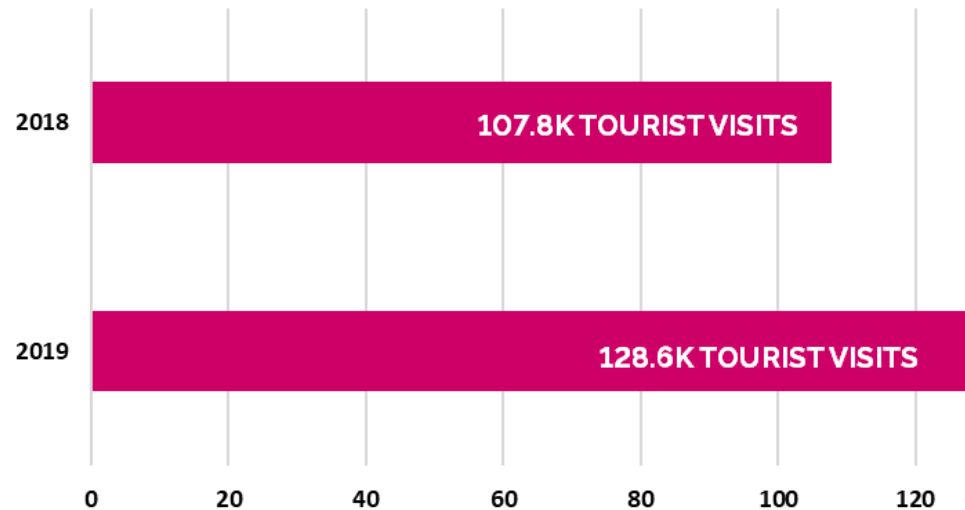
Fall 2023

DESTINATION
ONTARIO

MARKET SIZE

- There were **128,600 tourist visits from Australia to Ontario** in 2019 (+19% over 2018).
- Tourists from Australia stayed **9 nights** per overnight Ontario visit, on average, in 2019.
- Australia accounted for **4% of all overseas visits to Ontario** in 2019, up from 3% in 2018.

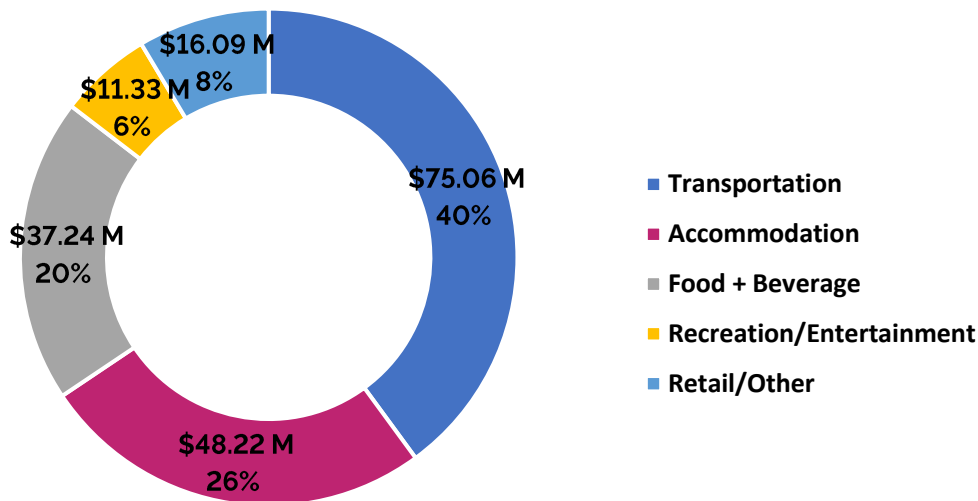
AUSTRALIA VISITS IN ONTARIO



VISITOR SPENDING

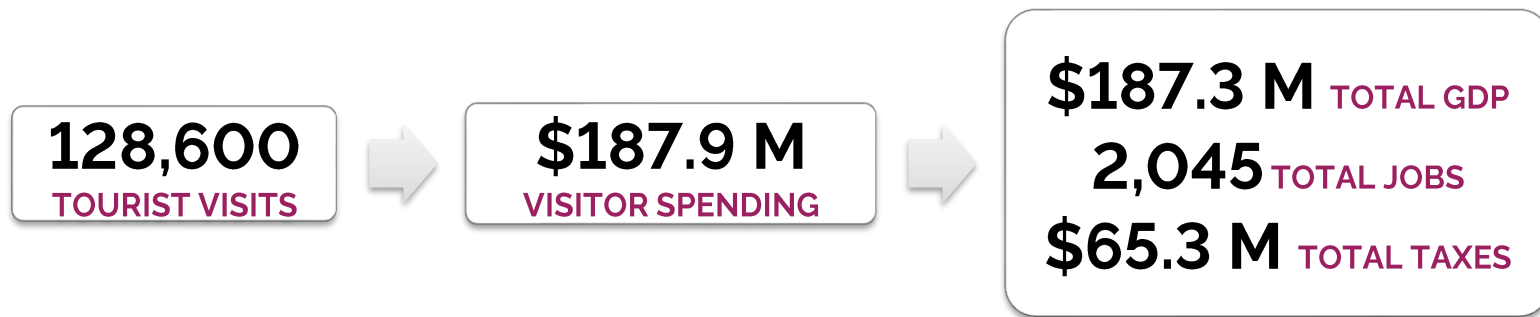
- Visitor spending from Australia totalled **\$187.9 million** in 2019 (+14% from 2018).
- Australia accounted for **3% of overseas spending**, stable with 2018.
- Tourists from Australia spent an average of **\$1,461 per visit in Ontario** in 2019 – **6.6 times more** than the average spend per visit in Ontario. The largest share of visitor spending was on **transportation (40%)**.
- Destination Canada has estimated that it may take until 2024 for Australian tourism spending in Canada to recover to 2019 levels.

AUSTRALIA SPENDING BY CATEGORY: 2019



THE VALUE OF THE AUSTRALIAN TRAVELLER

ECONOMIC IMPACT OF VISITOR SPENDING FROM AUSTRALIA IN ONTARIO (2019)



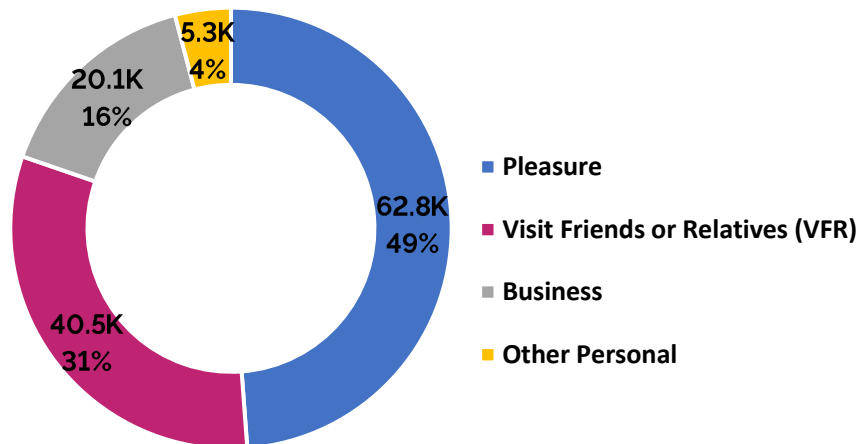
Source: Statistics Canada, Visitor Travel Survey (2019) and the Ontario Ministry of Tourism, Culture and Sport's Tourism Regional Economic Impact Model



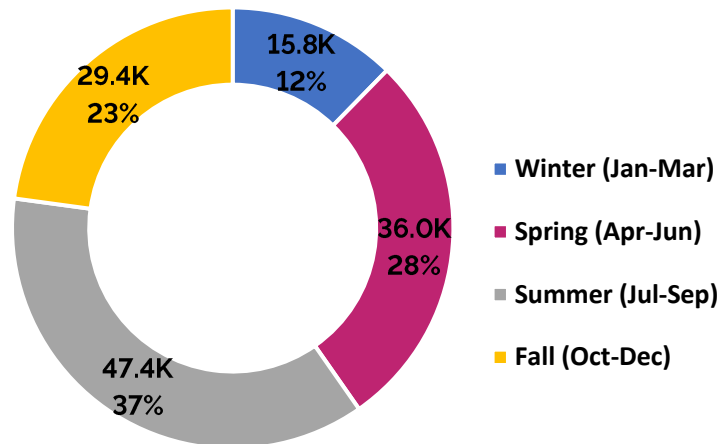
TRIP CHARACTERISTICS

- **49%** of tourist visits from Australia to Ontario were taken for **pleasure**
- **37%** of tourist visits from Australia to Ontario occurred in the **summer**

MAIN PURPOSE OF AUSTRALIA VISIT: 2019



AUSTRALIA SEASON OF VISIT: 2019



Source: Statistics Canada, Visitor Travel Survey

TRIP CHARACTERISTICS

TOP TRIP ACTIVITIES IN ONTARIO (2019)

TRIP ACTIVITY	% AUSTRALIA VISITS IN ONTARIO
Restaurant, bar or club	88%
Sightseeing	73%
Shopping	72%
Visit friends or family	57%
Historic site	49%

Source: Statistics Canada, Visitor Travel Survey

TOP TOURISM REGIONS VISITED (2019)

TOURISM REGION	% AUSTRALIA VISITS IN ONTARIO
Region 5: Greater Toronto Area	70%
Region 2: Niagara Canada	34%
Region 10: Ottawa and Countryside	26%
Region 1: Southwest Ontario	5%
Region 3: Hamilton, Halton, Brant	3%

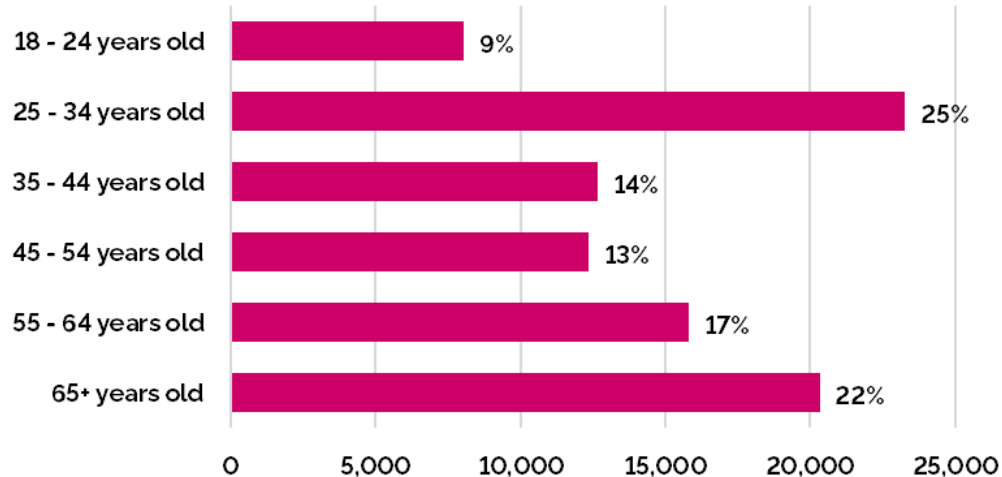


DESTINATION
ONTARIO

DEMOGRAPHICS

- The largest share of Australian tourist visits to Ontario was from those aged 25-34 (25%) in 2019. **The average age of an Australian tourist to Ontario was 47.**
- 5% of Australian travel parties to Ontario had children travelling with them in 2019.
- Of those who stated their gender, slightly more than half (52%) of Australian visits to Ontario were taken by men in 2019.

AUSTRALIA VISITS TO ONTARIO BY AGE STATED (18+): 2019



POTENTIAL MARKET SIZE FOR CANADA



Total potential long-haul[^]
pleasure travellers aged
18 years or more



Target Market for Canada



Those in the dream to
purchase stages of the path
to purchase for Canada

Size of the target
market



Immediate Potential
for Canada



Will definitely/very likely visit
Canada in the next 2 years¹

Immediate potential



Source: Destination Canada 2022 Global Markets Traveller Incidence & Market Sizing Update

[^] Long-haul = outside of Australia, New Zealand, and the Pacific Islands | ¹ Includes respondents likely to visit Canada for a trip of 1 to 3 nights, or a trip of 4 nights or more.



DESTINATION
ONTARIO