

Canadian Summary Report 2015



Executive Summary

Canada at a glance 2015

Canada economy - Canada's recovery from a mild recession is likely to gain momentum in 2016, helped by an improving outlook from a surprising source — Alberta — currently the country's weakest link, the Conference Board of Canada said Monday. While a pickup in exports will be the likely driver overall next year, Alberta should benefit from slightly higher oil prices and infrastructure investment, leading to a modest rebound in economic growth in 2016 after a resources-driven decline this year. "Across the country, the economy has been picking up speed, and that is expected to carry through into 2016," the Ottawa-based think-tank said in its quarterly outlook. "The trade sector will drive much of the improvement, underpinned by strong growth in the U.S. economy and a lower Canadian dollar," it said, leading to growth in this country of 2.3 per cent next year — following an estimated 1.3 per cent increase this year, which was hampered by a mild recession in the first half driven by the global collapse in oil prices.

GDP - Despite eking out only meagre growth in 2015 after a first-half downturn, the Canadian economy is expected to keep pace with many of its Group of Seven counterparts this year and next, according to the International Monetary Fund.

Financial Post January 2016

Housing Market - Contrary to all the predictions, the Canadian real estate market, once again, had a record-breaking year in 2015. Toronto and Vancouver continued their hot streak even as Alberta and Saskatchewan cities watched their housing sales slide; still, the rest of the nation's housing markets started to balance out—moving closer and closer to a more stable, reasonable market.

Money Sense January 2016

Global financial crisis - Patterns in economic data are showing signs of weakness, and the troubles persisting in Europe or the bubble bursting in China may be the trigger that sends the economy over the edge. Unlike in 2008, when central banks were able to lower interest rates and expand their balance sheets, central banks now have much less elbow room to enact loose monetary policy to prevent a recession from happening.

Canadian Travel to the United States

So far this year, overnight auto travel to the US has decreased by almost 1.6 million trips, while non-auto trips have declined -3.4 per cent. **Travel activity continues to vary regionally; trips by Ontario residents have decreased -0.7 per cent.** Despite the strong American dollar, Canadians are still travelling and spending. A few examples are: direct passenger arrivals in Hawaii increased 11.5 per cent while Los Angeles and Phoenix recorded increases of 4.4 per cent and 3.3 per cent, respectively. Direct arrivals into Las Vegas and New Orleans also grew compared to the same period a year ago. Furthermore, direct air arrivals from Canada to major Florida destinations grew by 6.2 per cent to 1.45 million.

The Conference Board of Canada – Outbound Canada December 2015



Drive Market - Canadian Gas Prices



The Globe and Mail cited a report Friday (January 2nd) by the London, Ont.-based Kent Group saying that Canadians could be on track to save \$12 billion on gasoline if crude costs stay at their current levels. The report noted that Canadians paid an average of about \$1.28 per litre for unleaded gasoline in 2013, with prices dropping to 98.1 cents per litre at the end of this year. If the latter price holds up, Canadian households could save about \$25 per week, or even \$1,200 per year, said CTV News.

Huffington Post January 2016

Examples of growth in market despite currency

Direct Air Arrivals to Select U.S. Destinations (January-August)

Destination	2011	2012	2013	2014	2015	2015 vs. 2014	CARG*
Orlando	316,972	338,007	353,849	357,981	380,330	6.2%	4.8%
Sarasota	11,365	11,341	11,590	13,907	16,872	21.3%	11.8%
Tampa	81,877	84,816	90,971	100,898	115,273	14.2%	5.6%
Miami	257,496	262,171	268,974	266,555	270,916	1.6%	3.5%
Fort Myers	53,150	62,117	68,537	77,049	82,686	7.3%	13.0%
Palm Beach	16,318	21,862	26,002	28,882	26,939	-6.7%	4.8%
Fort Lauderdale	325,749	326,569	335,010	365,553	394,116	7.8%	6.9%
Total Florida	1,062,927	1,106,883	1,154,933	1,210,825	1,287,132	6.3%	5.7%
Hawaii	184,736	207,030	208,393	222,736	244,756	9.9%	7.7%
Las Vegas	506,903	516,343	513,889	582,935	606,798	4.1%	4.2%
Los Angeles	604,623	591,498	626,482	694,510	739,859	6.5%	3.5%
New Orleans	11,949	12,296	12,006	12,563	14,072	12.0%	-
Phoenix	288,309	308,641	307,726	323,974	342,668	5.8%	7.5%

Sources: Hawaii's figures from State of Hawaii Department of Business, Economic Development & Tourism. Other figures are from respective airport authorities.

*CARG = Compound Average Annual Rate of growth 2008 to 2015.

The Conference Board of Canada – Outbound Canada December 2015



Airlines are adding new routes into the US in 2016

Air Canada Unveils Major Expansion to 12 US Destinations - Air Canada announced new non-stop services between four key Canadian hubs and 12 U.S. cities beginning next summer. The new transborder routes will introduce new destinations, such as Toronto-Washington-Dulles, Toronto-Salt Lake City and Vancouver-San Jose, while also creating new city-pair routings, such as Vancouver-Chicago, Montreal-Houston, Montreal-Denver and Calgary-San Francisco.

Air Canada November 2015

More Millennials and Increase in Travel Agent Services

It isn't just Baby Boomers seeking the expertise of travel agents, as a new generation of time-pressed customers accustomed to good service seeks out professionals to help plan their trips. In a new report released last month by L.E. Hotels, more than half (51.5%) of agents said they see growth in the number of Millennial clients. About 60% said that over the past two years, 10-25% of their new business was Millennial clients. "For a good 15 years, when the Internet came into play, a lot of people chose to bypass this as an option for a career," says Claire Newell, owner of Travel Best Bets, an agency based in Vancouver. "For the simple things, people are using the Internet and doing it themselves — simple flights and hotel bookings," Newell explains, "but over the past four years there has been a move back to using travel agencies. People want to have everything taken care of for them. The millennials want someone who knows better than they do to book their trip for them, and like the Boomers and matures, want to see some pretty bucket list-y type trips. They're going to Macchu Pichu and the Great Wall of China." They also want airport transfers taken care of, show tickets obtained, tables reserved at restaurants, hotel upgrades — they want it all, and they're willing to pay a booking fee.

Travel Market Report December 2015

Millenials do not have a point of reference with a par exchange rate. They will pay knowing the value of their experience is worth it.

Modern Family

Booming Travel Niche Means more than it used to. Whether it's immediate family or "multi-gen" -- with toddlers, teenagers or grandparents -- tour operators are continuing to target the family travel niche, reports Ann Ruppenstein in this week's digital edition of Travel Courier. "Family travel is becoming more and more significant in people's lives," says Dina Bertolo, VP of product development at Air Canada Vacations. "They want to create lasting memories." A growing number of requests and bookings for family travel led Air Canada Vacations to expand its family-friendly offerings.

At the heart of this trend is the Baby Boom generation, of whom four in ten are grandparents. This population segment values travel and doesn't consider a vacation a luxury, but rather a "must have". They are living longer and staying active later into life. This group is also wealthier than their predecessors often allowing them to be the "financiers" of the family vacation. As the number of grandparents continues to increase, multi-generational travel will also grow in size and influence.

Travel Press January 2015



Wellness Travel

Whether it's a study, testimonial, or research, it seems there's always something new in the world of health and fitness, leading to a booming industry for wellness travel. According to wellness industry expert Spafinder: "Almost 9 out of 10 (86%) travel agents said they expect to see growth in the wellness travel industry. That's the highest percentage of agents expecting annual growth in the survey's eight-year history."

Travel Market Report December 2015

Adventure and Experience Travel

Travelers are seeking an authentic experience, whether it's at a local off-the-beaten path destination or one that offers a unique cultural experience. Customers want to do something different and have more unique experiences when they travel. They want up-close and personal experiences, whether that is through food, culture, activities, or all of the above. Some popular trips she sees are expedition

Travel Market Report December 2015



Public Relations Canada Recap 2015

In 2015, Visit NC – Canada office was successful in increasing exposure within our core markets of Ontario and Quebec. We are also pleased to share that we were able to broaden the scope to achieve national coverage. We reached consumers through multiple channels including print, online and social media; targeting Canadians in different niche markets and demographics; while influencing travel to the various regions across the state. In 2015, a combination of both group and individual FAM's were organized showcasing key pillars including sports, culinary, adventure and more!

Media Events:

Visit North Carolina Media Mission – held in Toronto, Ontario in April 2015 – the Canada team secured 10 high value desk side meetings and 5 A list media to attend an intimate dinner. The mission resulted in 5 press trips along with tremendous potential for future opportunities such as: Glow Magazine photo shoot, a Globe and Mail feature with travel editor Domini Clark, and a multitiered Zoomer campaign (with print/online/social and editorial components).

TMAC— held over a two day period in June 2015- April Beauchamp travelled to Peterbough, Ontario to attend the annual Travel Media Association Conference; meeting with top freelancers and publications across Canada. As a result, April scheduled 22 appointments to update the media on new and upcoming North Carolina offerings, while brainstorming 2015/2016 press trips to highlight several interest areas such as culinary, soft adventure, family friendly offerings and film.

Discover America Day - Charmaine from the Canada Office represented North Carolina at the Discover America Canada Day media marketplace on October 5th 2015. With 15 scheduled appointments the team was able to develop and nurture media relationships, communicate North Carolina's distinct and iconic experiences, and gauge interest in FAMs and editorial for 2016 and beyond.

2015 Media Visits

Peter Cheney & Jordan Chittley - Globe and Mail

Margaret Swaine - National Post

Robin Harvey – London Free Press

Corinne McDermott - Have Baby Will Travel/Movie Entertainment Magazine

Nadia Durivag – Yummy Mummy Club

Laila Maalouf - La Presse

Pat Lee - Toronto Sun/Post Media

Vawn Himmelbach - Metro News

Toronto Star – Greg Mercer: Sports themed individual press trip



Press Trip Generated Coverage Highlights:

"The North of the South" Score Golf Magazine – Adam Stanley

"Fast and Furious, North Carolina Style" Toronto Sun/Post Media –Kevin Hann

"Pirates of the Carolina's" Doctor's Review Magazine – Jo Matyas

"Cinq villes a visiter pour leur scene culinaire" Le Journal de Montreal – Veronique Leduc

"Motherly bonding adventure in America's foodiest small town" National Post – Alyssa Swartz

"North Carolina is the BBQ Capital" Vancouver Sun – Nathan Fong

"Carolina Dreaming on the Tar Heel Express" Preferred Magazine – Steve Wilson

"The golf and the glory" Just for Canadian Doctor's Magazine – Tim Johnson

"The Magic and Movies of North Carolina" Movie Entertainment Magazine – Corinne McDermott

"42 Hours in Charlotte" Le Journal de Montreal & Quebec – Marie France Bornais

"North Carolina Barbecue" Taste and Travel Magazine – Nathan Fong

"Moonshine & the need for speed" The London Free Press - Robin Harvey

"North Carolina with Kids" Have Baby Will Travel – Corinne McDermott

"Road- Tripping up the Beach" Metro News – Vawn Himmelsbach

"Wineries to Discover" La Presse – Laila Maalouf

"Nothing Finer than North Carolina History, Rugged Beauty, Wonderful Wines all wrapped in Southern Charm" Sun Media – Pat Lee

"Road-tripping to Winston Salem, North Carolina" Yummy Mummy Club – Nadia Duriavig
"A Sporty North Carolina" Toronto Star – Greg Mercer





Trade & Consumer Canada Recap 2015

In 2015 our trade goal was to keep North Carolina top of mind and grow product. The plan included: product development, education, exciting and incentivizing travel trade, along with high value sales meetings and a CAA FAM. Through targeted product offerings, innovative training initiatives and trade event attendance we were able excite and influence product developers, increase overall brand awareness for the state and maintain market share in our core markets (Ontario & Quebec).

Industry Events:

Governor's Conference- held March 2015 in Pinehurst, NC. The Canada office prepared and executed a presentation to industry members and state partners, educating them on the Canadian market, travel trends and successes for media, trade and consumer during the year of 2014.



IPW 2015 - held in May 2015 in Orlando, Fl. The Canada team secured 10 Canadian appointments with top tour operators for an opportunity to speak directly with Charlotte CVB, along with VisitNC representatives. The appointments were facilitated by the Canadian office to ensure everyone was up to date on the current product and promotions in market and allowed this time to brainstorm future initiatives together. The appointments included meetings with GOGO Vacations, itravel2000, Tripcentral.ca, Air Canada Vacations and Voyages Gendron. As a result, many B2B trainings were executed in 2015.

OMCA 2015 - Stephanie Freed-Burns from the Canada office attended the OMCA 2015 marketplace which was held on November 15th – 18th in London Ontario. The event provided opportunities to network, develop relationships with key trade partners, and obtain a pulse on the motor coach market in North Carolina's most viable Canadian region (Ontario). North Carolina received 20 prescheduled face to face appointments with buyers/tour operators. 7 minute meetings allowed for a valuable exchange of information and the opportunity to showcase North Carolina's motor coach offerings.



Canadian Sales Mission – held in Toronto, Ontario in April 2015, the Canadian team conducted an annual strategic sales mission, welcoming travel trade partners from Charlotte, Biltmore and the Outer Banks. The group met with 10 high level companies including FIT and motorcoach for the opportunity to educate and excite front line agents, in addition to product development across the state. The group also hosted an A list trade event, welcoming top producers and influencers in Toronto which allowed partners to entertain, network, and build product and relationships. **The Canada team challenged the traditional networking evening event; inviting top operators to experience the Raptor's take on the Charlotte Hornets.**







Canada team visits NC! Charmaine Singh and April Beauchamp traveled to Charlotte with Heidi Walters to meet with the LGA team: Scott Gilmore, Jane Duncan and Brooks Luquire in addition to Mark Shore from Visit North Carolina.

The Canada team had the opportunity to debrief LGA on current traveler trends and statistics from Canada, in addition to discussing in market activities as it relates to both trade and PR; successes and upcoming opportunities. LGA provided an update on their current projects, including Vacation BIG; positioning North Carolina as a Vacation getaway, not just a drive through state. The team advised they are able to provide greater support as it relates to digital tools such as images and videos as well as contribute creative elements for campaigns i.e. Assistance with promotion hashtags and promotion names. LGA advised digital strategy is growing and there will be future opportunities to align our in market activities, as an example Vacation BIG and Project543. Lastly, LGA shared their direction to include more Lifestyle elements, working closely to promote key pillars including: Scenic Beauty, Adventure and Outdoor including promotion of the National Parks, celebrating 100 years.





CAA Travel Agent FAM

Explore North Carolina this fall!

Description:

Visit North Carolina invites you to explore the beauty, diversity and culture this fall. Discover some the best NC has to offer in locations found just off the highway.



Come check out the vibrant, rich state first hand as there is no better way to sell a destination than to experience yourself!

Highlights:

- Chow down on Carolina famous BBQ at the Lexington BBQ Festival Lexington NC is the BBQ capital of the world
- Go wild at the North Carolina Zoo in Asheboro; the largest natural inhabitant zoo in North America featuring over 1600 animals!
- Visit the country's largest community of potters in Seagrove NC, full of rustic pottery, beauty, rich colours, texture and shapes captured into clay for a lifetime.
- Alamance Co
- Conservator's Center
- General Store
- Explore North Carolina's capital city, Raleigh!

Dates: Friday Oct 23 - Monday Oct 26th, 2015

Why CAA?

CAA is a very important partner for North Carolina. Over 70% of Canadians traveling to North Carolina drive! It remains vital for us to work with you to provide itinerary ideas and routes to suggest to your clients so they will consider more time in the state or their final destination, rather than driving through. Located directly off of major driving routes commonly taken by Canadians, North Carolina is the perfect getaway for CAA!

**Visit NC Canada team secured 7 front line agents to attend the FAM from various locations in South Central Ontario and Quebec; perfect drive locations to North Carolina

Innovation: During the FAM agents were asked to take notes and respond to daily trivia questions. Small prizes were awarded to the participant who had the most correct answers each day. This was a simple yet effective tool to encourage participation and engagement throughout the trip. **Moving forward we plan to develop similar initiatives to drive home key messages and inspire participants to make deeper connections with the state.**



2015 Sales Calls, Trainings and Webinars

The Canada team worked diligently throughout the year to communicate with the travel trade (drive, group and fit) to ensure they were up to date on new and unique offerings in North Carolina. In addition, the Canadian team reached out to many like-mind brands (targeting airlines, tour operators, wholesales and motorcoach) to create compelling campaigns and work together to develop and increase product to the state.

Meetings and trainings included, but were not limited to the below companies:

Sales Calls/Trainings:

Brightspark Travel CAA National CAA South Central Ellison Tours Alio

Flight Centre Porter Airlines

itravel2000

Scotia Inspire

EF Tours

Merit Golf Vacations

Senior Tours

Groupe Voyages Quebec

Voyages Gendron

Air Canada

Flight Centre

Explorica

Denure Student/Senior Tours

Uniglobe

Travel Brands

Consumer Marketing Calls:

itravel2000

AVIS Car Rental

BMW

Twining's Tea

Zoomer Media

Honda Canada

Lexus Canada

CityLine

Toronto Star – Marketing/Tablet

Travel Alerts

Travel Zoo

JazzFM

Entertainment One

680 News

Clairins



Consumer Partnership - Have Baby Will Travel & Honda Canada

VisitNC Canada partnered with Toronto blogger, Corinne McDermott and Honda Canada to launch a social media contest in June 2015. Corinne and her family Vacationed Big in North Carolina, exploring coastal, piedmont and mountain adventure. The campaign included several elements such as: daily social media posts, contest page/teasers, Honda car rental, Vacation BIG prize and more.

The contest included multiple state partners in Charlotte, Cabarrus and Brevard. Bringing awareness to a targeted market (mom/families) to explore and learn more about family friendly fun throughout the state; while engaging the drive market through Honda Canada. The contest concluded on July 15th with almost 500 entries to win! In addition, Corinne McDermott provided 5 blog posts and engaged readers through social media channels, pre, during and post press trip.







Results:

Have Baby Will Travel content:

/2015/07/16/nags-head-nc-outer-banks-with-kids/ /2015/08/02/north-Carolina-Raleigh-with-toddlers/ /2015/08/28/north-carolina-24-hours-in-charlotte-with-kids/ /2015/06/25/win-trip-drive-to-north-Carolina-family-vacation/ /2015/08/16/north-Carolina-charlotte-motor-speedway-tours/ /2015/09/15/north-carolina-transylvania-county-earthshine-resort/ /destination/united-states/north-carolina-travel-guide/ **Total Page Views: 2382 Total Unique Page Views: 2164**

Social Media

TWITTER: Impressions: 35,440 Engagements: 1045

FACEBOOK: Reach: 6,776 Engagements: 246

INSTAGRAM: Engagements: 862

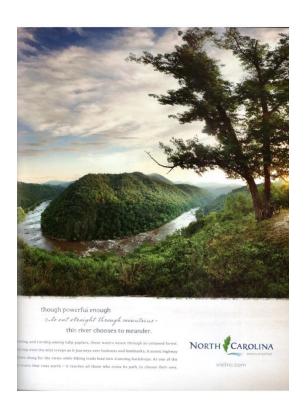


B2B & B2C Target Marketing - PAX Magazine & Canadian Traveller

During spring/summer 2015, Visit North Carolina had a large presence in both the consumer and travel trade market with targeted messaging to readers. Keeping North Carolina top of mind remains vital to the success of our visitation!

The Canada team worked closely with two of the largest travel trade publications (PAX Magazine and Canadian Traveller) to bring awareness of new compelling ads from VisitNC, while provide editorial content for both agents and consumers; the articles included: 9 Wildly Fun Family Excursion in North Carolina and North Carolina Farm-to-Fork Bites & Brews. These topics were selected to bring awareness to our key marketing pillars, in addition to the interest of Canadian travellers.







Visit Charlotte partners with Aeroplan!

As a result of the April 2015 sales mission; Visit Charlotte created a compelling and unique package to be included in the New Aeroplan auction!

REWARD LISTING

VIP NASCAR Hall of Fame Induction Ceremony Experience in Charlotte: January 21 – 24, 2016

REWARD OVERVIEW: Looking for a high octane experience? Win this exclusive auction and you and a guest will be on your way to explore Charlotte's NASCAR scene and be a part of history and attend the seventh annual NASCAR Hall of Fame Induction Ceremony! Not only will you enjoy the Induction Ceremony, but you will also be a guest at the exclusive Induction Dinner and Jacket Presentation, where a NASCAR Sprint Cup Driver will be seated at your table!

Enjoy your accommodations at the Westin Charlotte, located a short walk away from the NASCAR Hall of Fame, this glass-sided skyscraper hotel is located in the heart of the city and will be your gateway to the sights, sounds and experiences that downtown Charlotte has to offer. In your spare time be sure to check out the endless entertainment options at the EPICENTRE, located just a few blocks away. The EPICENTRE offers the unique combination of cafes, restaurants, late night spots and retail. Also, be sure to check out one of the areas craft breweries. Several are located in the hip eclectic South End neighborhood which is easily accessible from the Westin via the light rail that makes a stop at the hotel.

Charlotte's NASCAR Hall of Fame is a hit with families, history buffs, and gearheads and more – you don't have to be a die-hard NASCAR fan to get in on the high-speed fun. A tribute to the history of NASCAR and the drivers, crew members and team owners who popularized the fast-paced sport, the NASCAR Hall of Fame is part museum and part interactive racing experience. The 150,000-square-foot venue is an interactive, entertainment attraction honoring the history and heritage of NASCAR with more than 1,000 artifacts and 50 interactive exhibits.

The highlight of your trip will be honoring Jerry Cook, Bobby Isaac, Terry Labonte, Bruton Smith and Curtis Turner during this year's NASCAR Hall of Fame Induction ceremony. Drivers, celebrities and legends of the sport will take the stage during this premier celebration that will honor the seventh class of the NASCAR Hall of Fame.

This experience includes:

Two (2) Exclusive Driver Dinner Packages to the 2016 NASCAR Hall of Fame Induction Ceremony

- o NASCAR Sprint Cup Series Driver and their Guest at Table
- o Induction Dinner Seats, including Jacket Presentation
- o Induction Ceremony Seats
- o Commemorative Dinner and Ceremony Tickets
- o NASCAR Hall of Fame Class of 2016 Yearbooks
- o Admission to First Look at Class of 2016 Inductee Exhibits
- o NASCAR Hall of Fame Annual Pass

Three (3) nights' accommodation at The Charlotte Westin (two queen size beds).



Brand Promotion Partnerships - Zoomer **2015/2016 execution**



OBJECTIVES

- Position North Carolina within relevant content that resonates with our target demographic
- Inspire readers to discover North Carolina as the ideal vacation destination that has something for everyone
- Deliver an engaged audience who have more interest, time and money available for travel.

Launch with the December 2015/January 2016 New Year/New You issue of Zoomer Magazine on newsstands for 2 months for maximum reach and awareness (November 30 – January 30). Layer in social media during the on-sale period for this issue and finally add in sponsored content in a Zoomer Magazine Travel e-newsletter during this same time period providing a completely integrated campaign with multiple touch points that can be built upon throughout the year.



Investment: \$5000

ELEMENT	VALUE
Full Page Dec./Jan Issue Zoomer Magazine	\$12,474
Social Media – one tweet, one Facebook post – supplied creative	\$1,000
Advertorial in Zoomer Travel E-Newsletter (68,000 subscribers) – supplied creative	\$5,300
TOTAL VALUE	\$18,774









ENTERTAINMENT ONE & "THE CHOICE" PROMOTION

Partners include: Entertainment One, Yogen Fruz, Crystal Coast & Air Canada

Launch date: January 21st, 2016

Goals: To generate excitement among audiences to attend the February 5th premiere of "The Choice" by creating a brand sell for North Carolina, to increase profile and encourage visitation to the state.

With a Coastal themed promotion Canadian consumers will have the opportunity to enter into a sweepstakes for a 3 week period in advance of the film release date

