



Over 3 million Indian long-haul leisure travellers intend to visit Canada in the next two years.

2018 Performance



2018 Arrivals¹
287,420
(↑14.7%)



2018 Average Trip Spend²
\$1,437

Key Insights

- India set new monthly arrivals records every month in 2018, a new annual arrivals record and grew to become Destination Canada's seventh largest long-haul market.¹
- In 2018, India was the only Destination Canada long-haul market to consistently show monthly gains in air arrivals both direct from overseas and via the US.¹

2019 Forecast



Visitor Forecast²
309,830
(↑7.8%)



Spend Forecast (CAD)²
\$428 M
(↑8.6%)



Air Seat Capacity Growth³
↑2.0%

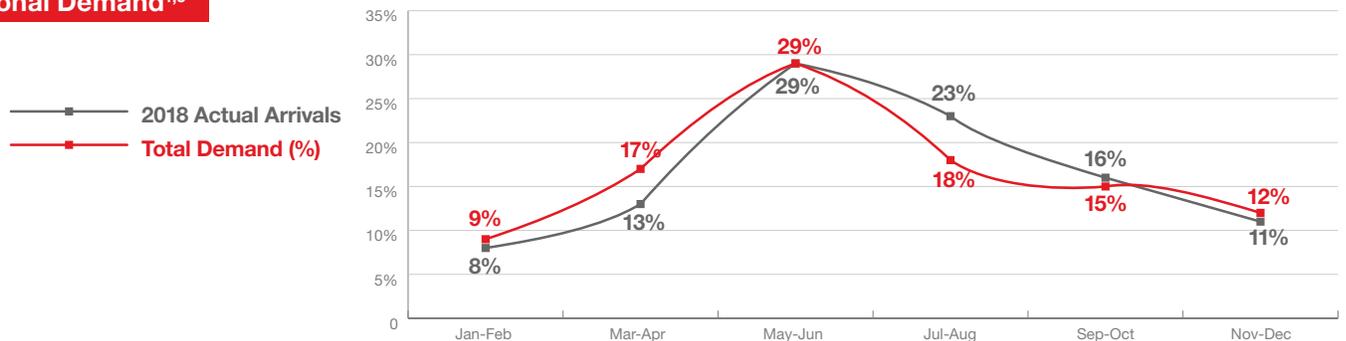


Local Currency vs. CAD⁴
↓8.5%

Market Insights

- In 2018, demand for travel to Canada among Indian leisure travellers was higher between May and June than any other time of the year.⁵
- Indian leisure travellers want to see natural attractions like mountains, waterfalls, wildlife, nature parks, historical or heritage sites, as well as shopping for items that help them remember their trip.⁵
- Most trips to Canada by Indian leisure travellers (80%) are booked as part of an organized group travel package through a travel agent or tour operator.⁵

Seasonal Demand^{1,5}



¹ Statistics Canada, Frontier Counts, 2018.

² Destination Canada Research estimates, using Statistics Canada preliminary 2018 Q1-Q3 VTS, 2017 ITS Q4, Frontier Counts, National Tourism Indicators, Bank of Canada and visitor forecasts from Destination Canada 2019 Forecast.

³ IATA SRS Analyzer Data, March 2018.

⁴ Bank of Canada.

⁵ Global Tourism Watch 2018.



Market Potential⁵



Canada's target market

3,948,000



82%

are definitely/very likely to visit
Canada in the next 2 years



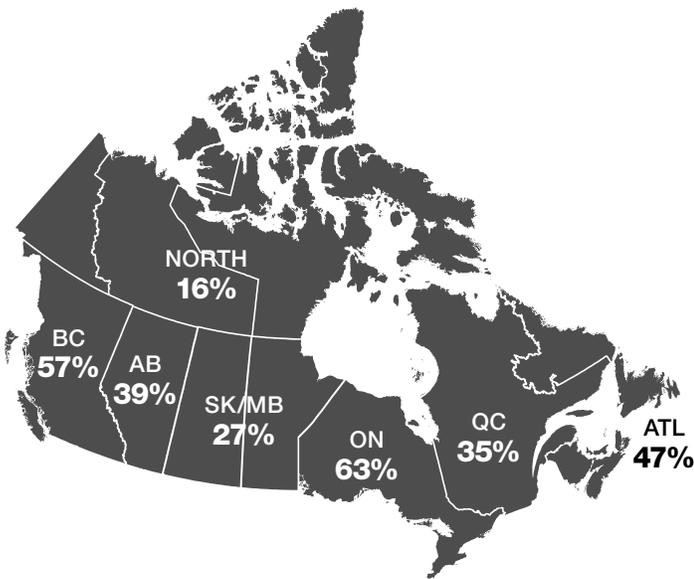
3,217,500

Canada's immediate potential

Top Drivers for Indian Travellers to Any Destination⁵

- 1 Combines the best of both outdoor activities and city experiences
- 2 Offers good value for money
- 3 Is a place that provides intellectually stimulating travel experiences
- 4 Has great winter outdoor activities I would participate in
- 5 Is a place I would be proud to tell people I have visited
- 6 Is a safe place to visit
- 7 Has a unique culture that I would want to experience on a vacation
- 8 Has great dining and food experiences
- 9 Has beautiful outdoor scenery and landscapes
- 10 Is a great place to see wildlife in its natural habitat

Travel Consideration by Province, % Likely to Visit Region⁵



Travel Agent/Tour Operator Usage For Recent Trip to Canada⁵

Used for either research <u>or</u> booking	88%
Used for both research <u>and</u> booking	59%
Used for research <u>only</u>	19%
Used for booking <u>only</u>	10%

For further information, please contact:

Carl Vaz
 Account Director
 T +91-22-65172273/74
cvaz@charsonadvisory.com

⁵ Global Tourism Watch 2018.