



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

## 2018 Performance



2018 Arrivals<sup>1</sup>  
**287,420**  
(↑14.7%)



2018 Average Trip Spend<sup>2</sup>  
**\$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.<sup>1</sup>
- 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.<sup>1</sup>

## 2019 Forecast



Visitor Forecast<sup>2</sup>  
**309,830**  
(↑7.8%)



Spend Forecast (CAD)<sup>2</sup>  
**\$428 M**  
(↑8.6%)



Air Seat Capacity Growth<sup>3</sup>  
**↑2.0%**

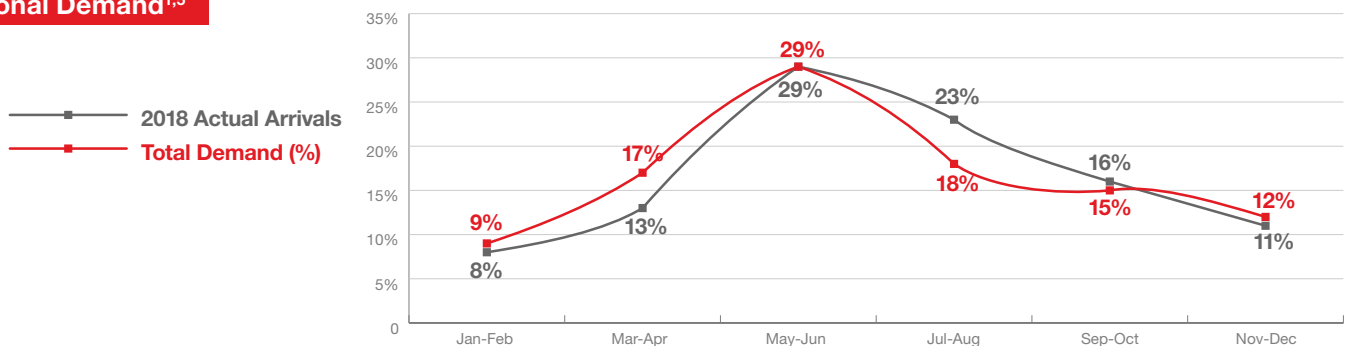


Local Currency vs. CAD<sup>4</sup>  
**↓8.5%**

## 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.<sup>5</sup>
- 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.<sup>5</sup>
- 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.<sup>5</sup>

## Seasonal Demand<sup>1,5</sup>



<sup>1</sup> Statistics Canada, Frontier Counts, 2018.

<sup>2</sup> 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.

<sup>3</sup> IATA SRS Analyzer Data, March 2018.

<sup>4</sup> Bank of Canada.

<sup>5</sup> Global Tourism Watch 2018.



## Market Potential<sup>5</sup>



Canada's target market

# 3,948,000



# 82%

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



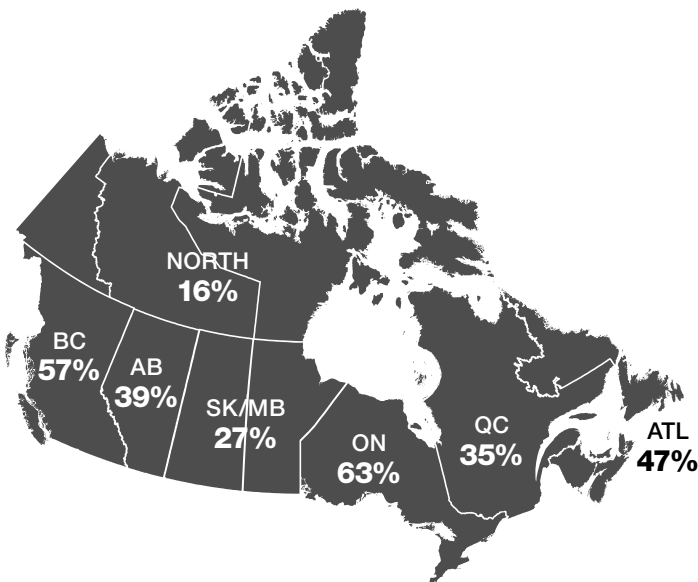
# 3,217,500

Canada's immediate potential

## Top Drivers for Indian Travellers to Any Destination<sup>5</sup>

- 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 Region<sup>5</sup>



## Travel Agent/Tour Operator Usage For Recent Trip to Canada<sup>5</sup>

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

### For further information, please contact:

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<sup>5</sup> Global Tourism Watch 2018.