



India Market Highlights – Facts at a Glance

Almost 3 million Indian long-haul travellers intend to visit Canada for pleasure in the next two years.

2017 Performance



Arrivals¹

254K (↑18%)



Average Trip Spend²

\$1,486

- Considerable increases in air capacity (up 53% over 2016) supported India's appetite for international travel.
- Direct air arrivals to Toronto increased by 42%, with Air Canada establishing a new route between Mumbai and Toronto in July 2017.

2018 Forecast



Visitor Forecast²

273K (↑7%)



Spend Forecast²

\$521M (↑10%)



Airline Seat Capacity³

↑37%



Local Currency vs CAD⁴

↑1.7%

Market Insights



Visiting friends and family is a primary motivator for Indian travel to Canada, with more than half of tourists in 2016 stating their trip to Canada was primarily for this reason.²



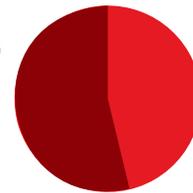
The typical Indian leisure traveller desires destinations that facilitate immersion in awe-inspiring natural surroundings, alongside experiences that cater to everyone in their travel party.⁵



In 2017, more Indian travellers reported having 'very good' to 'excellent' knowledge of holiday opportunities in Canada compared to 2016. Fewer travellers also reported that visa requirements were a barrier to visiting Canada, thus increasing the perception that Canada is more accessible.⁵

Channel Investment Mix

53%
Travel Trade

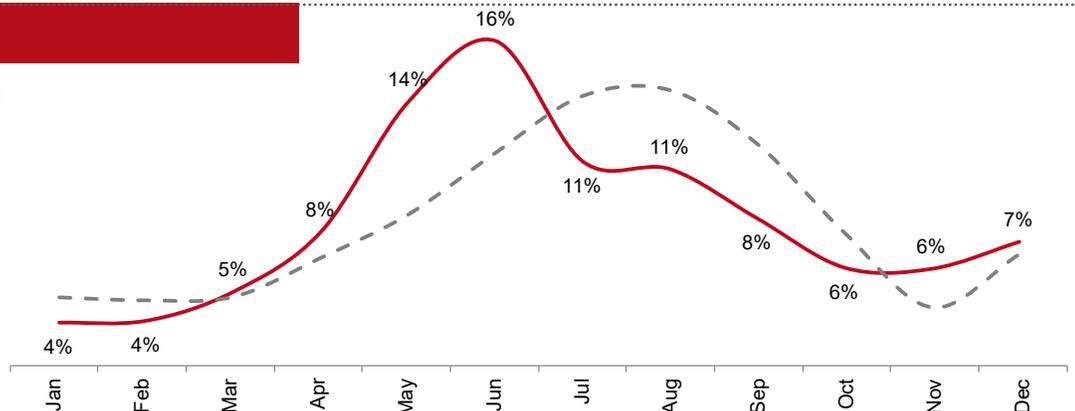


48%
Consumer Direct
& Earned Media

Travel Seasons¹

% of arrivals to Canada by month

— India
- - Destination Canada Market Average



Market Potential⁵



3,785,500

Target Market for Canada



78%

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



2,941,500

Immediate Potential for Canada

Top Drivers⁵

The main features that Indian travellers desire in a destination are...

- 1 Easy to travel to from where I live
- 2 Beautiful outdoor scenery and landscapes
- 3 Adventures that everyone can enjoy
- 4 Great place to see wildlife in its natural habitat
- 5 Great place for touring around to multiple destinations
- 6 Proud to tell people I have visited
- 7 Spend quality time with friends and/or family
- 8 Great dining/food experiences
- 9 Great shopping
- 10 Allows me to de-stress

Target Audiences



25-44 High Net Income Travellers

If they are going to travel far, they want to ensure that they will be able to see and do everything they possibly can, and participate in activities that immerse them into the destination.

Key themes

Excite and inspire with iconic and unique experiences that will immerse them into Canadian culture.



Experiencing vibrant cities

Experiencing urban icons interspersed with local, niche experiences.



Canadian Indulgence

Discovering culinary, wellness, and entertaining experiences unique to Canada.



Experiencing the outdoors

Introduce soft adventures that go beyond viewing nature and wildlife (e.g. skiing, kayaking, golf).



55-64 High Net Income Travellers

They want to make sure that they can see and experience everything in their travels - being able to share that with their family and friends brings them joy.

Key themes

Satisfy a need for variety of experiences through inspirational content and structured itineraries that communicate abundance.



Experiencing natural icons

Taking in the beauty and wonder of Canada's natural icons (i.e. Niagara Falls).



Guided experiences

Seeing the best of regions through the guidance of local experts.



Culinary discovery

Experiencing the culinary flair of different regions in Canada.

Canada

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¹ Statistics Canada, Frontier Counts, 2017

² Destination Canada Research estimates, using Statistics Canada preliminary Q1-Q3 ITS, Frontier Counts and e311 adjusted data (April 2018)

³ IATA SRS Analyzer Data, March 2018

⁴ Tourism Economics, March 2018

⁵ Global Tourism Watch 2017