DESTINATION CANADA

Global Tourism Watch

2018 India Public Summary Report

Canada

Table of Contents

Introduction

Destination Canada began conducting the annual Global Tourism Watch (GTW) program in 2007. The primary purpose of this research program is to provide consumer-based intelligence in 11 core markets around the world: Australia, China, France, Germany, India, Japan, Mexico, South Korea, the United Kingdom, the United States, and the domestic Canadian market.

The overall objectives of the GTW study are to:

- Monitor awareness, travel intentions, and other key market indicators for Canada and the regions;

- Assess perceptions of Canada and track brand performance against competitors over time;

- Identify the general experiences sought by travellers, and identify growth opportunities;

- Identify motivators and barriers for travel to Canada; and,

- Determine the influence of various information sources on destination selection.

The GTW permits direct comparison of Canada to competing destinations in each market. Destination Canada has designated the following destinations as competitors in the Indian market: the US, France, the UK, Switzerland, Australia, China, Germany, Italy, Sweden, Japan, Russia, and South Africa. The countries included represent 95% of the outbound travel volume to long-haul destinations which are considered direct competitors to Canada (e.g., non-beach destinations).

Questionnaire Changes

Questionnaire Changes

In 2018, questions were added in the following areas:

- Cost-related barriers to visiting Canada;

- Time of year of a potential visit to Canada; and,

- Sources of inspiration in destination selection.

Methodology

Data was collected via an online survey and has been weighted to represent the Indian long-haul travel population within the mid and upper SEC classifications (ABC). The target population in India was residents aged 18 years and older, who have taken a long-haul pleasure trip outside of India, Middle East, and South Asia where they had stayed at least 4 nights with a minimum of 1 night in paid accommodation in the past 3 years, or plan to take such a trip in the next 2 years. The cities of Bangalore, Chennai, Delhi, Hyderabad, Kolkata, and Mumbai were included in this survey and data has been weighted to represent the long-haul travel population within these cities.

Data was gathered from 1,501 respondents in India, including 223 recent visitors to Canada, in August 2018. Results are compared against previous GTW waves (data gathered in December 2016 and July 2017). In addition, select comparisons are made to the 2017 Pulse Check study conducted in November 2017. The Pulse Check is a shorter version of the GTW study, conducted to monitor movement of key metrics on a more frequent basis.

Throughout the report, statistically significant differences (95% confidence interval) from one wave to the next are denoted by arrows in the charts: green arrows pointing up if the metric has increased and red arrows pointing down if the metric has decreased. Results were also analyzed among different segments and demographic cohorts; throughout the report, references are made where there are statistically significant differences compared to the general traveller.

Study Overview: India Market

The target population are residents aged 18 years and older, who have taken a long-haul pleasure trip, where they had stayed at least 4 nights with a minimum of 1 night in paid accommodation in the past 3 years, or plan to take such a trip in the next 2 years.

Timing of Fieldwork

AUG
2018

Geographical Definition for Qualified Trips

Outside of: India, Middle East, and South Asia (Bangladesh, Nepal, Pakistan, Sri Lanka)

GTW Sample Distribution

Sample distribution: **Mumbai, Delhi, Chennai, Kolkata, Hyderabad, Bangalore**

Recent visitors to Canada:	**223**
Other travellers:	**1,278**
Total sample size:	**1,501**
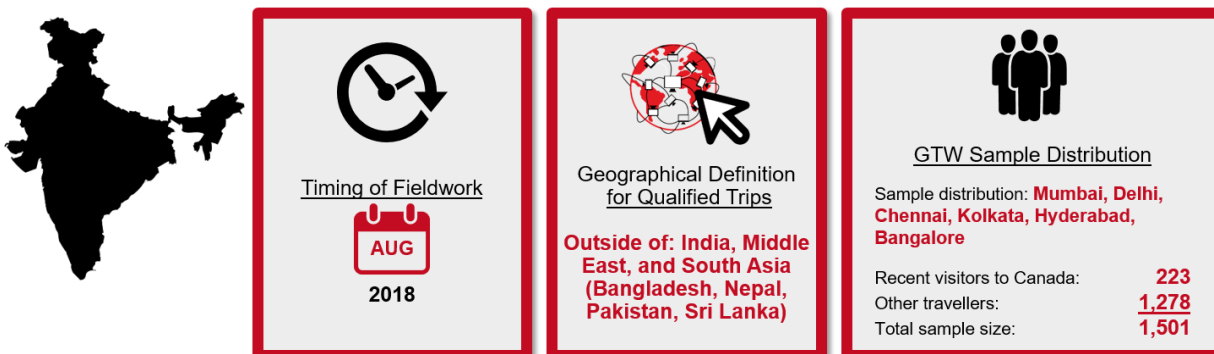
Background

India is the 7th largest economy in the world, with a 3% share of global GDP *(International Monetary Fund, October 2018)*.

India's GDP growth in 2017 stalled slightly from 2016 but was the 2nd strongest (behind China) among all countries in Asia at 6.7%. India is the fastest-growing G20 economy and economic growth is projected to continue at 7.3% in 2018 and 7.4% in 2019 *(International Monetary Fund, October 2018)*. This higher growth forecast for 2018 is a reflection of a rebound from both the currency exchange initiative and the implementation of the national Goods & Services tax (introduced in July 2017), along with strengthening investment and healthy private consumption *(International Monetary Fund, October 2018).*

Despite a strong economic growth forecast, most Indians do not experience the benefits. According to a study by Oxfam India, the richest 1% now holds 73% of the country's total wealth (*Business Today India, January 30, 2019*). India is the second most populous country in the world, following only China. In July 2018, the Indian population was estimated to be 1.3 billion (*CIA World Factbook: India*). By 2024, due to China's slowing population growth and India's increasing growth, it is expected that India will overtake China as the most populous country in the world. (*Statistics Times, United Nations Department of Economic and Social Affairs, July 2018*).

The unemployment rate remained low at 3.5% in 2017 and is expected to hold to the same level in both 2018 and 2019, leaving only about 18.6 million Indians without work in 2018. Despite strong job creation, 90% of jobs are of poor quality, being informal or vulnerable positions *(United Nations International Labour Organisation, World Employment and Social Outlook Trends 2018)*.

Although inflation dropped to 3.6% in 2017, it was expected to hit 4.7% in 2018 (*International Monetary Fund, October 2018*). Higher oil prices and rupee depreciation are the primary factors causing inflation (*OECD, Economic Survey of India, 2017*).

Consumer confidence remains high among Indians but had been experiencing a downward trend. Confidence levels were at 64.0 in August 2018, down from 65.2 six months prior and 66.1 a year before *(Thomson Reuters / Ipsos Primary Consumer Sentiment Index, August 2018)*.

India's outbound tourism market ranks 17th in the world (*United Nations World Tourism Organization, April 2018*). There were over 22 million departures in 2017 with the projection of 22.5 million departures for 2018 (*International Trade Administration, US Government, October 2018*). India has become one of the fastest growing outbound tourism markets globally, owing to strong economic growth, rising incomes, an expanding middle class, as well as the availability of low-cost airfares and diverse travel options. The UNWTO anticipates that the current number of Indian outbound travelers will more than double to 50 million by 2020 *(Forbes, March 2017)*. Indians spent $21.4 billion USD on outbound travel and tourism in 2018, up from $15.1 billion USD in 2014 (*World Travel & Tourism Council Data Gateway, 2018*). Indian outbound numbers have been growing an average of 10-12% annually over the last 7 years (*International Trade Administration, US Government, October 2018)*.

Market Potential

HIGHLIGHTS

✓ *The immediate potential market has increased to 3.22 million Indian travellers in 2018 compared to 2.94 million in 2017, an increase of 280,000 travellers.*

✓ *This increase in immediate potential is due to a significant increase in Indian travellers definitely or very likely to visit Canada in the next 2 years (82%, up significantly from 78% in 2017 and 73% in 2016).*

✓ *The long-haul travel outlook declined significantly to +10 in 2018, down from +15 in 2017.*

✓ *Interest in visiting BC is down significantly in 2018 (57%, down from 64% in 2017).*

GTW data is used to estimate the size of the potential market for Canada. The table below provides an estimate of the size of the potential Indian market for Canada in two ways – the macro target market and the immediate potential market.

Size of Potential Market to Canada (Next 2 Years)

Measure	2016 GTW (Dec)	2017 GTW (Jul)	2018 GTW (Aug)
Long-haul pleasure travel market	4.79 million		
Target market for Canada (dream to purchase stage)	81%	79%	82%⌃
Size of the target market	3.90 million	3.79 million	3.95 million
Immediate potential for Canada (definitely/very likely to visit in next 2 years[1])	73%	78%	82%⌃
Size of the immediate potential	2.83 million	2.94 million	3.22 million
Actual Visitation	215,664	250,633	287,416

⌃ / ⌄ *Significantly higher/lower than 2017 GTW wave.*
[1] *Includes respondents likely to visit Canada for a trip of 1 to 3 nights, or a trip of 4 nights or more.*
Base: Target market for Canada = long-haul pleasure travellers (past 3 years or next 2 years); Immediate potential for Canada = dream to purchase stages for P2P for Canada
QMP1. Which of the following best describes your current situation when thinking about each of the following destinations for a holiday trip?
QMP6. Realistically, how likely are you to take a holiday trip to Canada in the next 2 years?

The long-haul travel market size is derived from an omnibus study of the Indian adult population conducted in 2011. Long-haul travel incidence is comprised of travellers who indicate that they have travelled for a long-haul pleasure trip in the past three years or intend to do so in the next two years.

The proportion of GTW respondents who are in the dream to purchase stages for Canada is up significantly year-over-year (82% versus 79% in 2017); however, it is stable compared to 2016 (81%). Based on the 2018 result, the size estimate for long-haul Indian travellers is 3.95 million, up from 3.79 million in 2017 but consistent with 3.90 million in 2016.

The immediate potential is a more conservative estimate based on GTW respondents who say they are definitely or very likely to visit Canada in the next two years. The 82% result in 2018 is a significant increase from 78% in 2017 and 73% in 2016 – this suggests that there is an upwards trend in urgency to visit Canada. There are 3.22 million travellers with immediate potential for conversion in 2018, an increase of 280,000 potential Indian travellers (compared to 2.94 million potential travellers in 2017).

Among Destination Canada's ten international markets, India was ranked 7th in immediate potential market size (behind the US, China, South Korea, the UK, Germany, and France). However, actual visitation from India was ranked 8th among Destination Canada's international markets in 2018. This means there is an opportunity for Canada to improve at converting potential travellers to actual visitors in the Indian market.

For context, Canada attracted 287,000 visitors from India in 2018, up 15% from the 251,000 Indian visitors in 2017[1]. The 287,000 arrivals represent 9% of the immediate potential market.

Also of interest is the demonstrated interest in Canada's regions among the Immediate Potential market (3.22 million). In 2018, Ontario has reclaimed the top position as the region with the most interest, appealing to 63% (or 2 million potential visitors). BC follows with interest from 57% (or 1.8 million potential visitors), although interest is down significantly from 64% in 2017. Atlantic Canada is in 3rd spot, appealing to 47% of the immediate potential market (1.5 million visitors).

Potential Market Size for the Regions

Immediate Potential for Canada: *3,217,500*

Key:
% likely to visit region
Immediate potential (000s)

NORTH
16%
518

BC
57% ⟍
1,824

AB
39%
1,255

SK/MB
27%
853

ON
63%
2,037

QC
35%
1,139

ATL
47%
1,506

⟋ / ⟍ *Significantly higher/lower than 2017 GTW wave.*
Base: Those in the dream to purchase stages of the path to purchase for Canada and definitely/very likely to take a trip to Canada (n=1038)
QMP7. If you were to take a holiday trip to Canada in the next 2 years, which of the following Canadian travel destinations are you likely to visit?

While the proportion of Indian travellers saying they will spend more on long-haul travel continues to exceed the proportion who say they will spend less, long-haul travel intentions among Indian travellers are down significantly in 2018 and have been trending down since 2016 (+10 in 2018, down significantly from +15 in 2017 and +18 in 2016).

---

[1] *Destination Canada, Tourism Snapshot, December 2018.*

The short-haul travel outlook continues to be negative, with more Indian travellers saying they will spend less on leisure travel within India, the Middle East and South Asia (-10, down from -9 in 2017 and -6 in 2016).

While Indian travellers continue to be more likely to travel within their own country, the market outlook for domestic travel (+36) has dropped significantly since 2017 (+44) and 2016 (+45).

Spending Intentions (in the Next 12 Months)
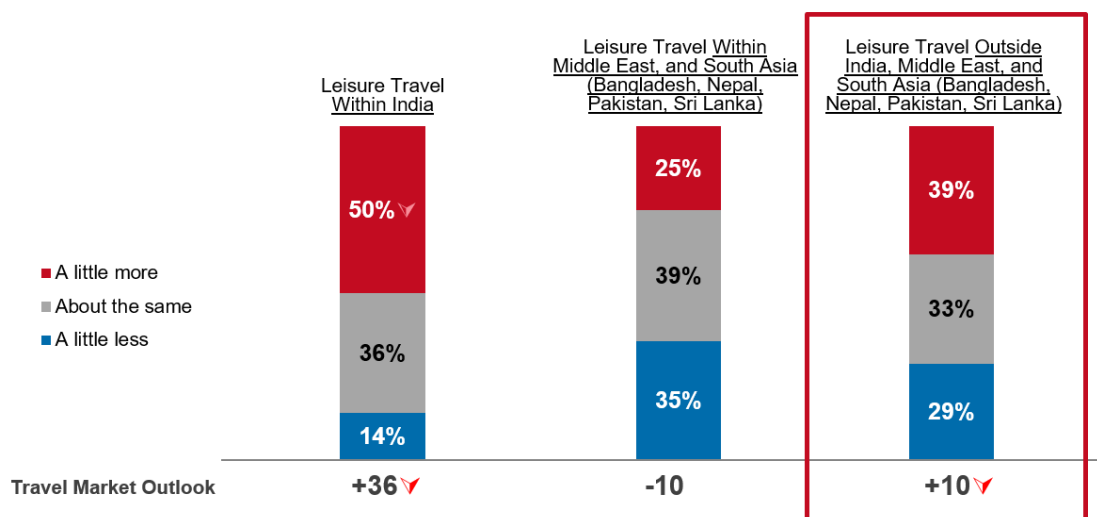
▲ / ▼ Significantly higher/lower than 2017 GTW wave.
Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=1501)
QS2. How would you describe your spending intentions on the following items in the next 12 months, compared to the last 12 months? Will you spend …?

Competitive Environment – Key Performance Indicators Summary

HIGHLIGHTS
✓ *While the proportion considering Canada on an aided basis is consistent to previous years, Canada has improved from 5th to 3rd rank due to significant declines in aided mentions for both the UK and Australia.*
✓ *Knowledge of travel opportunities in Canada has been trending upward and Canada's positioning among the competitive set has moved from 6th in 2017 to 5th in 2018.*
✓ *The UK has seen a significant decline in both unaided and aided consideration in 2018, and a significant increase in the proportion of Passives on the NPS metric; these results suggest a decline in interest for the UK as a travel destination.*

The GTW tracks the following Key Performance Indicators (KPIs) for Canada: unaided consideration and aided destination consideration, aided destination knowledge, and Net Promoter Score (NPS). Canada's performance is tracked against key competitors for the long-haul travel market. For India, these are the US, France, the UK, Switzerland, Australia, China, Germany, Italy, Sweden, Japan, Russia, and South Africa.

The outlook for Canada in the Indian market remains mixed. Out of the 13 competitive destinations that respondents were asked to evaluate, Canada remains 5th ranked for unaided consideration and 6th on NPS. However, there have been several positive shifts: Canada has moved from 5th to 3rd on aided consideration and from 6th to and 5th on destination knowledge.

Consideration

Unaided consideration represents top-of-mind presence of destinations in the consumer mindset and requires travellers to think of destinations without being prompted. Unaided consideration indicates that a strong impression has rooted in the mind of a traveller for a destination. From a marketing perspective, travellers who have Canada on their unaided consideration list may be easier to attract since they are actively thinking of Canada as a travel destination.

It is important to note that even though respondents are asked to list out long-haul destinations that they would consider visiting on an unaided basis, many respondents still mention other short-haul destinations such as Sri Lanka, Nepal, UAE, and Bangladesh. This could speak to the fact that many Indian travellers are very domestic and short-haul focused when thinking of travel destinations and could represent a challenge for convincing Indian travellers to go further abroad.

On an unaided basis, 6% of Indian travellers mentioned Canada as a destination under serious consideration in the next 2 years, up marginally from 2017 and 2016 (both 5%). Among long-haul destinations, Canada continues to trail behind the US (16%), Australia (11%), the UK (9%), and France (8%). Of note, unaided mentions of the UK are down significantly in 2018 (9%, down from 12% in 2017).

Those who have visited Canada recently remain more likely to mention Canada on an unaided basis (13%) compared to general Indian travellers. Indian long-haul travellers continue to mention very few specific places in Canada, suggesting knowledge of specific Canadian destinations remains low.

Unaided Long-Haul Destination Consideration (Next 2 Years)

Top 12 Destination Brands[1]

Destination	%
Sri Lanka	31%
Nepal	28%
United States	13%
Australia	11%
Dubai	11%
Singapore	10%
Bangladesh	9%
Canada	6% — 3rd among long-haul markets
Malaysia	6%
Middle East	5%
Thailand	5%
France	5%

Top 12 Destination Countries[2]

Destination	%
Sri Lanka	32%
Nepal	30%
United States	16%
United Arab Emirates (UAE)	13%
Australia	11%
Bangladesh	10%
Singapore	10%
United Kingdom	9% ⋎
France	8%
Canada	6% — 6.0% – Canada / 0.1% – Toronto / 0.1% – Niagara Falls / 5th among long-haul markets
Malaysia	6%
Thailand	6%

Long-haul markets

3% Don't know

9% Not planning to travel

⋏ / ⋎ *Significantly higher/lower than 2017 GTW wave.*
Note: [1] *Responses as mentioned by respondents (e.g., percentage who said "Canada" specifically).*
  [2] *Roll-up of brand mentions by country (e.g., percentage who said "Canada" or any destination in Canada).*
Base: *Long-haul pleasure travellers (past 3 years or next 2 years) (n=1501)*

QS8. *You mentioned that you are likely to take a long-haul holiday trip outside of India, Middle East, and South Asia (Bangladesh, Nepal, Pakistan, Sri Lanka) in the next 2 years. Which destinations are you seriously considering? (Please list up to 3 destinations.)*

Unaided Long-Haul Destination Consideration (Next 2 Years) – Canada Trended
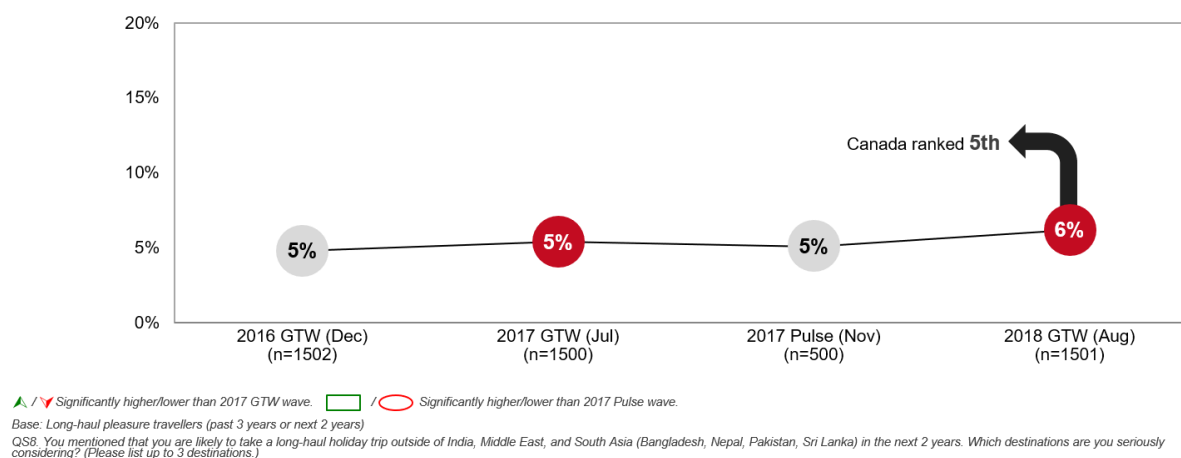
Aided consideration represents the proportion of travellers who say they would seriously consider visiting a destination, but only after they are prompted with a list of competitive destinations. Travellers who have aided consideration for Canada may not be thinking of Canada top-of-mind, but they are considering a visit. Continued prompts and cues through marketing efforts could help move these considerers down the Path-to-Purchase.

On an aided basis, 34% say they are seriously considering Canada for a leisure trip in the next 2 years, consistent with 36% in both 2017 and 2016. Canada has moved up to 3rd place (previously in 5th) behind the US (40%) and Switzerland (37%); this shift for Canada is due to significant declines in aided mentions for both Australia (33%, down from 38% in 2017) and the UK (33%, down from 37% in 2017). The decline in both unaided and aided consideration for the UK suggests declining interest in the destination among Indian travellers.

Both recent visitors to Canada (56%) and those considering a visit (46%) rank Canada first overall in aided consideration among all destinations in the competitive set. Knowing that past visitors are more interested in returning, it is important to attract new visitors.

Knowledge

Fifty-two percent of all Indian travellers rate their knowledge of travel opportunities in Canada as either excellent or very good, trending up from 50% in 2017 and 46% in 2016.

Among those considering Canada, destination knowledge stands at 65%, also trending upwards from 63% in 2017 and 60% in 2016. Knowledge of other competitive destinations has remained relatively consistent. However, with Japan seeing a marginal decline in 2018 (62%, down from 65% in 2017), Canada has moved from 6th to 5th position on this metric.

Knowledge of travel opportunities in Canada steadily rises as travellers move down the Path-to-Purchase: 40% of those in the dreaming stage are knowledgeable about Canadian travel opportunities, moving up to 60% in the considering stage and further to 69% among those actively planning a trip to Canada. Efforts to boost knowledge of Canadian travel opportunities could pay off by helping to move potential visitors along the Path-to-Purchase.

Key Performance Indicators

Indicator	Definition	All Long-Haul Travellers (n=1501)	Recent Visitors to Canada[1] (n=223)	Considering Canada[2] (n=896)
Intentions:				
Unaided destination consideration	% who mentioned Canada or a destination in Canada on their consideration list[3]	**6%**	**13%**	**9%**
Competitive positioning on destination consideration	Rank on the consideration list among 13 destinations	**3**	**1**	**1**
Destination knowledge:				
Aided awareness of travel opportunities in Canada	% with excellent/very good knowledge of travel opportunities in Canada	**52%**	**74%**	**65%**

⏶ / ⏷ *Significantly higher/lower than 2017 GTW wave.*

[1] *Visited Canada in the past 3 years (pleasure trip of 4 or more nights, with at least 1 night in paid accommodations).*
[2] *Those in the consider to purchase stages of the path to purchase for Canada.*
[3] *For trips in the next 2 years.*

Base: Long-haul pleasure travellers (past 3 years or next 2 years)
QS8. You mentioned that you are likely to take a long-haul holiday trip outside of India, Middle East, and South Asia (Bangladesh, Nepal, Pakistan, Sri Lanka) in the next 2 years. Which destinations are you seriously considering? (Please list up to 3 destinations.)
QBVC1. You may have already mentioned this before, but which destinations would you seriously consider visiting in the next 2 years?
QMP3. How would you rate your level of knowledge of holiday opportunities in each of the following destinations? (asked among all respondents)

Net Promoter Score (NPS)

The Net Promoter Score (NPS) measures the likelihood of travellers to recommend a destination. Results are gathered among travellers with each destination in their consideration set (have visited previously and/or considering a visit). The measure has an 11pt scale (0-10). The score is calculated by subtracting Detractors (0-6 rating) from Promoters (9-10 rating). Passives are those who provided a rating of 7-8.

Switzerland continues to achieve the highest NPS result (+54) among Indian travellers in 2018, although its NPS result has declined significantly since 2017 (down from +61). The US (+44), France (+42), Australia (+40), and the UK (+41) all achieve higher NPS scores than Canada (+39). Of note, the UK has recorded significantly more Passives in 2018 (37%, up from 30% in 2017) while Italy has seen a negative shift in its NPS result (+32, down significantly from +42 in 2017). All destinations in the competitive set now have positive NPS results, with China being the lowest by a considerable margin at +3.

When the results for Canada are examined among past three year visitors, the NPS result is +37 (up from +12 in 2017); among those who have not visited Canada in the past 3 years, the NPS result is +16. This underscores the opportunity to capitalize on advocacy from recent visitors as well as encouraging them to return. Among those who have ever visited Canada, the NPS result is +23, which is significantly lower than that of past three year visitors – this indicates the need to develop strategies that encourage visitors to advocate either during or immediately after a trip to Canada.

Net Promoter Score
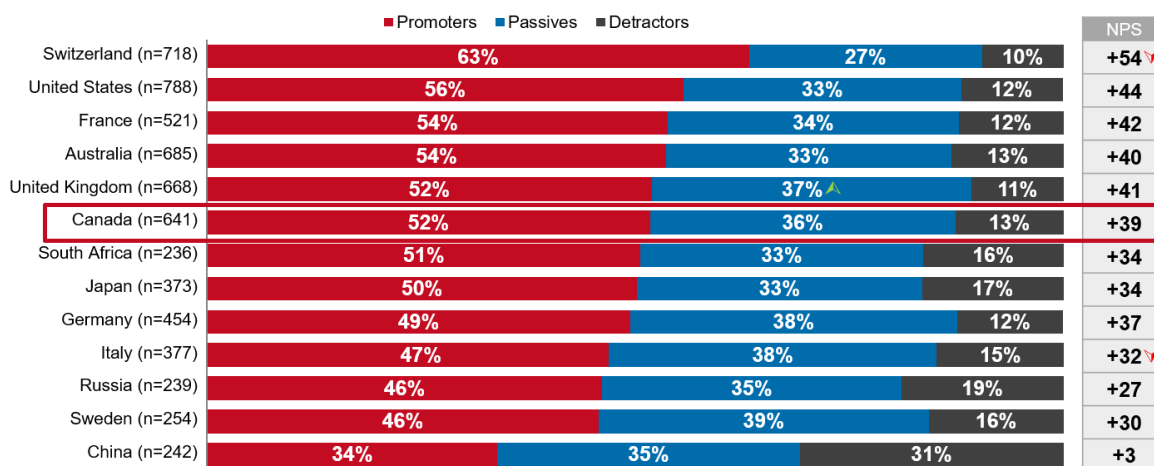
	Promoters	Passives	Detractors	NPS
Switzerland (n=718)	63%	27%	10%	+54 ⏷
United States (n=788)	56%	33%	12%	+44
France (n=521)	54%	34%	12%	+42
Australia (n=685)	54%	33%	13%	+40
United Kingdom (n=668)	52%	37% ⏶	11%	+41
Canada (n=641)	52%	36%	13%	+39
South Africa (n=236)	51%	33%	16%	+34
Japan (n=373)	50%	33%	17%	+34
Germany (n=454)	49%	38%	12%	+37
Italy (n=377)	47%	38%	15%	+32 ⏷
Russia (n=239)	46%	35%	19%	+27
Sweden (n=254)	46%	39%	16%	+30
China (n=242)	34%	35%	31%	+3

⏶ / ⏷ *Significantly higher/lower than 2017 GTW wave.*
Base: Long-haul pleasure travellers (past 3 years or next 2 years) considering visiting each country
QMP11. Whether you have visited or not, how likely are you to recommend each of the following holiday destinations to a friend, family member or colleague?

Path-to-Purchase

HIGHLIGHTS

✓ *Canada, the US, and Russia have all recorded significant declines in travellers who have never thought of visiting.*

✓ *Australia is the only country in the competitive set to see a significant increase in active planning in 2018.*

Like any other expensive and discretionary consumer product, there is a purchasing or decision-making cycle associated with long-haul travel: consumers move through progressive stages from not knowing anything about a destination to booking a trip. Advocacy happens during and after the actual visit.

Destination Canada wants to understand where the organization can have the greatest influence in converting those with interest in Canada to actual visitors.

Destination Canada's Path-to-Purchase Model
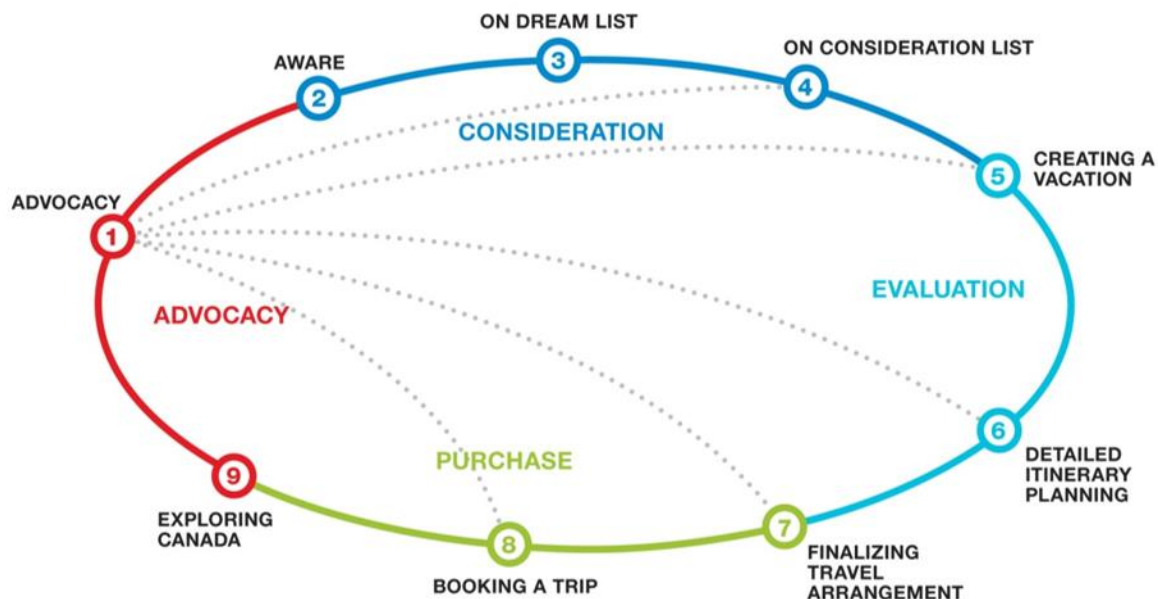
In addition to looking at individual stages of the P2P, Destination Canada has identified phases travellers move through in the purchase cycle. Key phases are defined below and are referenced throughout this report.

Destination Canada's Path-to-Purchase Model

Unaware	Have never thought of taking a trip to this destination	
Aware	Not interested in visiting/returning in the foreseeable future	
On Dream List	Dreaming about visiting/returning someday	
On Consideration List	Seriously considering visiting/ returning in the next 2 years	
Creating a Vacation Movie	Have started to gather some travel information for a trip to this country	
Detailed Itinerary Planning	Am planning the itinerary for a trip to this country	
Finalizing Travel Arrangements	Am currently making transportation and accommodation arrangements	
Booking a Trip	Have already booked my transportation and accommodations	

(Right-side brackets labelled: Dream to Purchase | Consider to Purchase | Active Planning)

Indian residents took a record 23.9 million outbound departures in 2017, two million more than the previous high of 21.9 million in 2016[2]. As a consequence of this interest in travel, several competitive destinations recorded improved Path-to-Purchase results in 2018.

The US has the strongest Path-to-Purchase, with 43% of Indian long-haul travellers actively engaged in planning a visit and a further 25% seriously considering a trip in the next 2 years. In 2018, the US recorded a significant decline in travellers who have never thought of visiting (3%, down from 9% in 2017).

For Canada, 33% of Indian travellers are actively planning a trip, trending upward from 30% in 2017 and 26% in 2016. Like the US, Canada recorded a significant decline in travellers who have never thought of visiting (10%, down from 14% in 2017). Notably, 41% of travellers aged 25-44 are likely to be actively planning a trip to Canada, significantly higher than any other age group, including travellers aged 55-64 (23%).

Australia is the only destination in the competitive set to see a significant increase in active planning in 2018 (41%, up from 28% in 2017). There are a few other trends to note with destinations in the competitive set. Japan saw a significant decline at the dreaming stage (23%, down from 33% in 2017), while Russia saw a drop in the proportion who have never thought of visiting (17%, down significantly from 26% in 2017).

---

[2] *Statista, 2019.*

Stage in the Purchase Cycle by Country

NET Active Planning

		NET Active Planning
Canada	10% 7% 26% 24% 14% 12% 4% 3	33%
United States	3% 5% 24% 25% 17% 15% 7% 3%	43%
Australia	10% 3% 20% 26% 17% 17% 4% 4%	41%
Germany	12% 7% 25% 23% 17% 11% 3% 4%	34%
Japan	13% 7% 23% 24% 14% 13% 5%	33%
Switzerland	6% 4% 31% 26% 11% 12% 5% 6%	33%
United Kingdom	8% 7% 28% 24% 14% 10% 7%	33%
France	9% 8% 29% 25% 13% 9% 4% 4%	30%
Italy	14% 8% 29% 19% 13% 11% 4%	30%
Sweden	17% 8% 29% 16% 15% 10% 3%	30%
Russia	17% 16% 22% 18% 12% 6% 7%	27%
South Africa	18% 11% 25% 20% 14% 9%	27%
China	19% 22% 18% 18% 10% 7% 4%	22%

Legend:
- ■ Have never thought of taking a trip to this destination
- ■ Not interested in visiting/returning in the foreseeable future
- ▢ Dreaming about visiting/returning someday
- ■ Seriously considering visiting/returning in the next 2 years
- ■ Have started to gather some travel information for a trip to this country (from friends, internet, etc.)
- ■ Am planning the itinerary for a trip to this country
- ■ Am currently making transportation and accommodation arrangements
- ■ Have already booked my transportation and accommodations
- ⌃ / ⌄ Significantly higher/lower than 2017 GTW wave.

Base: Long-haul pleasure travellers (past 3 years or next 2 years) – note all respondents evaluated Canada plus 2 randomly selected countries from the competitive set (n=varies)
QMP1. Which of the following best describes your current situation when thinking about each of the following countries for a holiday trip?

Stage in the Purchase Cycle – Canada Trended

% NET Active Planning

26% → 30% → 34% → 33%

	2016 GTW (Dec) (n=1502)	2017 GTW (Jul) (n=1500)	2017 Pulse (Nov) (n=500)	2018 GTW (Aug) (n=1501)
Have never thought of taking a trip to this destination	13%	14%	9%	10% ⌄
Not interested in visiting/returning in the foreseeable future	6%	7%	6%	7%
Dreaming about visiting/returning someday	31%	27%	28%	26%
Seriously considering visiting/returning in the next two years	25%	22%	23%	24%
Have started to gather some travel information for a trip to this country	12%	12%	14%	14%
Am planning the itinerary for a trip to this country	10%	13%	14%	12%
Am currently making transportation and accommodation arrangements	3%	3%	3%	4% ⌃
Have already booked my transportation and accommodations	1%	3%	2%	3%

⌃ / ⌄ Significantly higher/lower than 2017 GTW wave.   ▢ / ◯ Significantly higher/lower than 2017 Pulse wave.
Base: Long-haul pleasure travellers (past 3 years or next 2 years)
QMP1. Which of the following best describes your current situation when thinking about each of the following countries for a holiday trip?

The charts below show Canada's progress converting travellers at crucial steps in the purchase cycle relative to top competitors. For reference, also shown is the average across the entire competitive set. 'Strong' and 'weak' conversion ratios were derived through statistical analysis; specifically, if a conversion ratio is greater than one standard deviation from the average, then it is considered 'strong' and if a conversion ratio is lower than one standard deviation from the average, then it is marked as 'weak'.

Across the Path-to-Purchase, Canada's conversion performance is average compared to competitors in 2018 – this is a shift from 2017, where Canada's performance at the booking stage was relatively weak. It is notable that 2018 conversion rates are generally the same or slightly higher than previous years across most stages of Canada's Path-to-Purchase. The only exception is between creating a vacation movie and detailed itinerary planning (-3%). The largest increase in conversion over 2017 is between detailed itinerary planning and booking (+9%). This indicates that Canada has been more successful at converting potential Indian travellers into actual visitors in 2018.

Relative to the US and Australia, Canada's top long-haul competitors in the Indian market, the conversion result between dreaming and consideration stages is lower. With improved results between detailed itinerary planning to actual booking, there is an opportunity to now place a greater focus on improving conversion between the dreaming and consideration stages. Travellers go no further than the dreaming stage because they have an incomplete vision of what their holiday in Canada could look like. In their minds, they cannot visualize a satisfying holiday concept – one that will address all of their fundamental holiday needs. Motivation to move forward from the dreaming stage occurs as travellers learn about different urban, cultural and experiential opportunities available in Canada.

Path-to-Purchase Conversion – Canada

	Awareness		On Dream List		On Consideration List		Creating a Vacation Movie		Detailed Itinerary Planning		Booking a Trip
2018	90%	0.92	82%	0.69	57%	0.58	33%	0.57	19%	0.38	7%
2017	86%	0.92	79%	0.66	52%	0.57	30%	0.60	18%	0.29	5%
2016	87%	0.94	81%	0.62	51%	0.51	26%	0.55	14%	0.27	4%
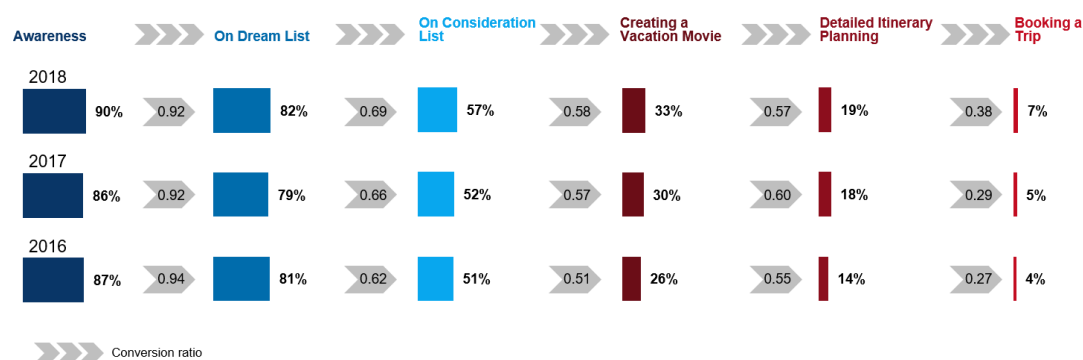
> Conversion ratio

Looking at conversion results among competitors, the US excels at getting on Indian travellers' consideration list and at creating a vacation movie. While Australia continues to be strong at moving Indian travellers from dreaming to considering, the UK continues to excel at converting travellers from planning to booking. Switzerland performs above average at converting travellers between the vacation movie stage and the detailed planning stage.

For context, the US recorded 1.3 million arrivals from India in 2017 (up 7% from 2016), while Canada welcomed 287,000 in 2018 (up 15% from 2017), Australia saw 358,000 in 2018 (up 18% from 2017), and the UK logged 531,000 in 2017 (up 37% from 2016). [3]

Path-to-Purchase Conversion – Top Competitors

	Awareness		On Dream List		On Consideration List		Creating a Vacation Movie		Detailed Itinerary Planning		Booking a Trip
Canada	90%	0.92	82%	0.69	57%	0.58	33%	0.57	19%	0.38	7%
United States	97%	0.95	92%	0.74	68%	0.63	42%	0.61	26%	0.42	11%
Australia	91%	0.97	88%	0.77	68%	0.61	42%	0.59	25%	0.31	8%
United Kingdom	92%	0.92	84%	0.67	57%	0.59	33%	0.58	19%	0.50	10%
Switzerland	94%	0.96	90%	0.65	59%	0.57	33%	0.67	22%	0.47	10%
France	91%	0.92	84%	0.65	55%	0.55	30%	0.58	17%	0.46	8%
Germany	89%	0.92	82%	0.70	57%	0.60	34%	0.52	18%	0.39	7%
Average Among Competitive Set	*88%*	*0.90*	*79%*	*0.68*	*54%*	*0.59*	*32%*	*0.57*	*18%*	*0.40*	*7%*

> Conversion ratio   > Weak   > Strong
Identified through statistical analysis

---

[3] *Destination Canada, US National Travel & Tourism Office, Tourism Australia, and Visit Britain.*

Time of Year Interest

HIGHLIGHTS

✓ *An opportunity exists to fill the March to April demand gap and to continue growing travel in May to June when demand is highest among Indian travellers.*

A new question added to the Global Tourism Watch in 2018 asked prospective Indian visitors which time of year they would consider visiting Canada. May to June (29%) is the most popular time of year, followed by July to August (18%) and March to April (17%). Compared to the distribution of actual Indian arrivals in 2018, the largest gap in demand is for the months of March to April, where those interested (17%) are higher than those actually visiting (13%). Given compression issues in the peak July to August months, an opportunity exists to fill the March to April demand gap to relieve pressure, and also to continue encourage travel in May to June which is the most popular time of the year for Indian travellers to visit Canada.

Time of Year Interested in Visiting Canada (Next 2 Years) versus Actual Arrivals
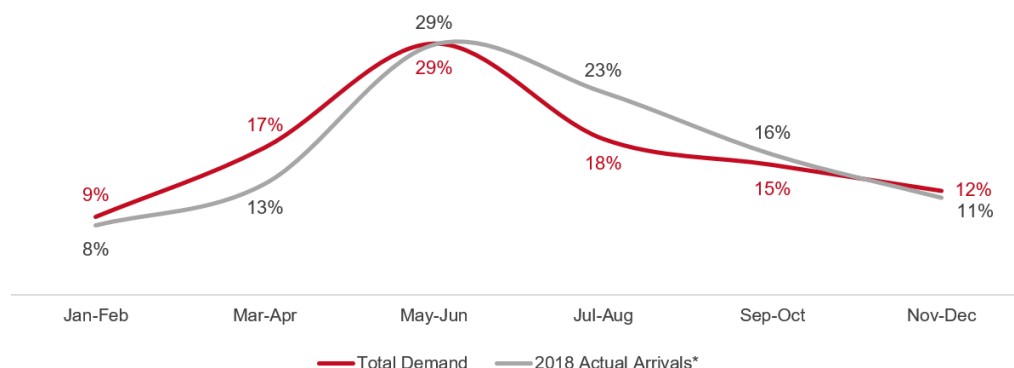
Canadian Destination Interest

HIGHLIGHTS

✓ *There is decreased interest in BC in 2018, including significant declines for Vancouver and the BC Rocky Mountains.*

✓ *Halifax also saw a significant drop in interest year-over-year among Indian travellers.*

✓ *Canada's landscape-based icons, Niagara Falls in particular, continue to hold greater appeal for Indian travellers compared to city destinations.*

Indian travellers in the dream-to-purchase stages and indicating they are definitely/very likely to visit Canada in the next 2 years were asked which parts of the country they would likely visit. In 2018, Ontario (63%, consistent with 2017) has reclaimed the top position as the region with the most interest; this is due to a drop in interest for BC (57%, down significantly from 64% in 2017). Atlantic Canada (47%), Alberta (39%), and Quebec (35%) are the next most popular destinations.

Niagara Falls (55%) and Toronto (52%) continue to be the most mentioned destinations among Indian travellers. Victoria (40%), Vancouver (37%, down significantly from 42%), the BC Rocky Mountains (36%, down significantly from 43%), and Ottawa (36%) round out the most popular destinations for Indian travellers. Despite a drop in popularity on the BC side, the Rocky Mountains remain a top draw with 28% of probable visitors heading to Alberta for this experience.

Halifax is the only other destination that saw a significant shift in interest in 2018 (17%, down from 22% in 2017).

Canadian Destinations Likely to Visit (Among those definitely/very likely to visit)

16% North	
10%	Whitehorse
9%	Dawson City
9%	Yellowknife
6%	Inuvik
6%	Iqaluit
2%	Other North

47% ATL	
28%	Cape Breton
24%	Saint John
24%	Charlottetown
24%	St. John's
19%	Fredericton
17%⌄	Halifax
11%	Other PEI
11%	Other NS
10%	Other NB
10%	Other NFLD

57%⌄ BC	
40%	Victoria
37%⌄	Vancouver
36%⌄	Rocky Mtns.
21%	Whistler
15%	Okanagan
8%	Other BC

39% AB	
28%	Rocky Mtns.
21%	Edmonton
20%	Calgary
17%	Jasper
11%	Banff
6%	Other AB

27% SK/MB	
16%	Churchill
15%	Winnipeg
14%	Saskatoon
14%	Regina
8%	Other SK
3%	Other MB

63% ON	
55%	Niagara Falls
52%	Toronto
36%	Ottawa
9%	Other ON

35% QC	
29%	Montréal
28%	Québec City
17%	Mont Tremblant
6%	Other QC

Base: Those in the dream to purchase stages of the path to purchase for Canada and definitely/very likely to take a trip to Canada (n=1038)
QMP7. If you were to take a vacation trip to Canada in the next 2 years, which of the following Canadian travel destinations are you likely to visit?
QMP7a-g. Within [province/region], which travel destinations are you likely to visit?

⌃ / ⌄ *Significantly higher/lower than 2017 GTW wave.*

The trended results show that interest in individual provinces and regions has remained relatively consistent since 2016. The only change to note is the significant decline in visiting BC in 2018.

Canadian Destinations Likely to Visit – Provinces/Regions Trended

	2016 GTW (Dec) (n=950)	2017 GTW (Jul) (n=987)	2017 Pulse (Nov) (n=351)	2018 GTW (Aug) (n=1038)
BC	63%	64%	63%	57%⌄
AB	38%	37%	34%	39%
SK/MB	23%	26%	28%	27%
ON	68%	63%	61%	63%
QC	37%	37%	39%	35%
ATL	43%	48%	47%	47%
North	18%	15%	16%	16%

⌃ / ⌄ *Significantly higher/lower than 2017 GTW wave.* ▭ / ◯ *Significantly higher/lower than 2017 Pulse wave.*
Base: Those in the dream to purchase stages of the path to purchase for Canada and definitely/very likely to take a trip to Canada
QMP7. If you were to take a holiday trip to Canada in the next 2 years, which of the following Canadian travel destinations are you likely to visit?

An additional question asked potential visitors to identify the one Canadian destination holding the greatest appeal. Niagara Falls, selected by 40% of prospective visitors, remains the most popular destination by a wide margin. The Rocky Mountains is the 2nd most appealing destination (10%), followed by Toronto (6%), Vancouver (4%), Victoria (4%), and Montreal (4%). There continues to be an opportunity to use well known natural landscapes as anchors and highlight their proximity to cities and lesser known/desirable destinations to attract Indian travellers.

Most Appealing Canadian Destination – Top 10 Mentions

Other SK	1.1%		Québec City	1.8%
Other NFLD	0.6%		Saint John	1.8%
Other PEI	0.5%		Edmonton	1.6%
Other NS	0.3%		Mont Tremblant	1.6%
Other BC	0.3%		Charlottetown	1.5%
Other AB	0.2%		St. John's	1.4%
Other NB	0.2%		Dawson City	1.3%
Other ON	0.2%		Jasper	1.2%
Other MB	0.1%		Banff	1.0%
Other North	0.1%		Regina	1.0%
			Okanagan	1.0%
			Fredericton	0.9%
			Halifax	0.6%
			Whistler	0.3%
			Saskatoon	0.3%
			Whitehorse	0.3%
			Winnipeg	0.3%
			Yellowknife	0.2%

4% Vancouver   10% Rocky Mountains   Churchill 3%
4% Victoria   2% Calgary
3% Cape Breton
Ottawa 2%   4% Montréal
6% Toronto
40% Niagara Falls

▲ / ▼ *Significantly higher/lower than 2017 GTW wave.*
Base: Those in the dream to purchase stages of the path to purchase for Canada and definitely/very likely to take a trip to Canada (n=1038)
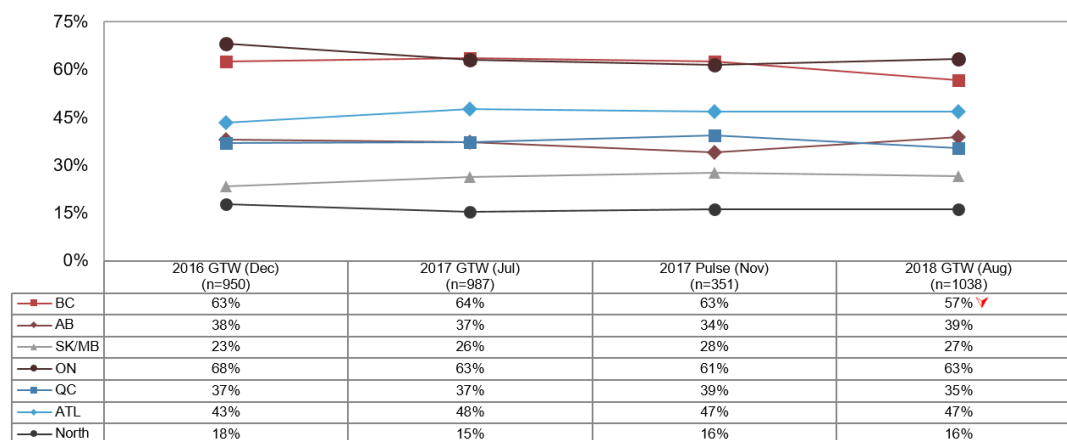*QMP8. And, which place in Canada most appeals to you?*

Vacation Activities

HIGHLIGHTS

✓ *Natural attractions, visiting nature parks, seeing historical sites, and wildlife viewing are the top trip anchor activities for Indian travellers.*

✓ *Travellers aged 25-44 are drawn more to active outdoor activities while travellers aged 55-64 have a preference for more leisurely and nature-based activities.*

Indian travellers were asked about which activities and experiences they seek while on holidays in general, regardless of the destination. Seeing natural attractions like mountains and waterfalls and visiting nature parks remain the most sought-after holiday experiences, followed by hiking/walking in nature, camping, and shopping for souvenirs. Rounding out the top ten are wildlife viewing, visiting historical sites, trying local food and drink, visiting city green spaces, and going to amusement parks. Wildlife viewing saw a significant decline in 2018 (46%, down from 50% in 2017). The results are similar to 2017 with the exception of visiting city green spaces, which moved into the top ten and is now ranked 9th, shifting nightlife out of the top ten and into 11th place.

Outside of the top ten activities, there were several significant shifts from 2017 to 2018. Several activities had significant downward shifts, including: guided city tours (38%, down from 42%), shopping for clothes and shoes (38%, down from 42%), visiting art galleries/museums (37%, down from 42%), guided nature tours (34%, down from 38%), and casual biking (22%, down from 26%). Exploring Indigenous culture is the only activity to have a significant upward shift (37%, up from 31%), however this activity was previously called Aboriginal culture and it is not possible to know whether increased interest reflects greater interest in Indigenous culture or is due to the wording change.

Travellers aged 25-44 are more interested than travellers aged 55-64 in outdoor activities such as casual biking, road cycling, fishing and hunting, mountain biking, downhill skiing and snowboarding, golfing, and ziplining. The top ten activities among travellers aged 25-44 are all similar to that of the general Indian traveller, except that road cycling (44%) and nightlife (42%) replace wildlife viewing and amusement parks.

Older Indian travellers aged 55-64 are more likely than travellers aged 25-44 to be interested in participating in leisurely activities such as: shopping for items to remember their trip, guided city tours, cruises, visiting amusement/theme parks, and exploring Indigenous culture. They are also more interested in nature-based activities such as: viewing natural attractions, visiting nature parks, viewing wildlife, and guided nature tours. The top ten activities among travellers aged 55-64 are also similar to that of the general Indian traveller, except that guided city tours (60%) and exploring Indigenous culture (51%) replace visiting city green spaces and trying local food and drink.

General Activities/Places Interested In – All Activities

Activity	%		Activity	%
Natural attractions like mountains or waterfalls	55%		Mountain biking	32%
Nature parks	54%		Scuba diving	32%
Hiking or walking in nature	50%		Guided boat tours	31%
Camping	49%		Guided train tours	30%
Shopping for items that help me remember my trip	47%		Shopping for luxury items	30%
Viewing wildlife or marine life	46% ⌄		Northern lights	30%
Historical, archaeological or world heritage sites	45%		Exploring places most tourists won't go to	29%
Trying local food and drink	45%		Fall colours	29%
City green spaces like parks or gardens	43%		Self-guided driving tours or road trips	27%
Amusement or theme parks	42%		Live shows or sporting events	27%
Nightlife	41%		Agricultural or country farm tours	26%
Food and drink festivals or events	40%		Downhill skiing or snowboarding	25%
Road cycling	40%		Snowshoeing or cross country skiing	24%
Cruises	39%		Kayaking, canoeing or paddle boarding	23%
Fine dining	38%		Breweries or wineries	22%
Guided city tours	38% ⌄		Spa or wellness centres	22%
Shopping for clothes and shoes	38% ⌄		Casual biking	22% ⌄
Art galleries or museums	37% ⌄		Guided airplane or helicopter tours	21%
+Exploring Indigenous culture, traditions or history	37% ⌃		Golfing	18%
Music festivals	36%		Renting a recreational vehicle (RV)	17%
Spring blossoms	36%		Culinary tours or cooking classes	17%
Guided nature tours	34% ⌄		Ziplining	16%
Fishing or hunting	33%		Rodeos	11%
			None of the above	0%

+ Aboriginal was changed to Indigenous in 2018 – review trending with caution.
Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=1501)
QMP10. In general, what activities or places are you interested in while on holiday?

⌃ / ⌄ *Significantly higher/lower than 2017 GTW wave.*

Trip Anchor Activities

A question added in 2017 asked Indian travellers which vacation activities are important enough that they would base an entire trip around them.

Consistent with 2017, seeing natural attractions (35%), visiting nature parks (31%), seeing historical sites (26%), and wildlife viewing (25%) are the top trip anchor activities. All of these are also among the top activities of interest for Indian travellers. While not a top trip anchor activity, interest in visiting city green spaces is up significantly in 2018 (17%, up from 14%).

Indian travellers aged 55-64 are more likely than travellers aged 25-44 to cite natural attractions like mountains or waterfalls, nature parks, guided nature tours, guided city tours, visiting art galleries/museums, exploring Indigenous culture, and cruises as trip anchor activities. The top ten trip anchor activities among Indian travellers aged 55-64 are all similar to that of the general Indian traveller except that guided nature tours (28%), seeing spring blossoms (26%), and visiting art galleries/museums (26%) are more popular than trying local food and drink (25%), camping (17%), and nightlife (11%).

Those aged 25-44 are more likely than travellers aged 55-64 to mention nightlife and mountain biking as trip anchor activities. The top ten trip anchor activities among Indian travellers aged 25-44 are all similar to that of the general Indian traveller except that hiking/walking in nature (19%) and shopping for clothes or shoes (19%) are slightly more popular than visiting amusement parks (18%).

Trip Anchor Activities

Activity	%
Natural attractions like mountains or waterfalls	35%
Nature parks	31%
Historical, archaeological, heritage sites	26%
Viewing wildlife or marine life	25%
Cruises	22%
Shopping for items to remember my trip	21%
Trying local food and drink	20%
Amusement or theme parks	19%
Nightlife	19%
Camping	18%
Spring blossoms	18%
Hiking or walking in nature	18%
Shopping for clothes/shoes	18%
Guided nature tours	17%
Music festivals	17%
Food and drink festivals or events	17%
City green spaces like parks or gardens	17% ▲
Fine dining	17%
Art galleries or museums	16%
Exploring places most tourists won't go to	16%
Northern lights	15%
Guided city tours	15%
Guided train tours	15%

Activity	%
Fishing or hunting	14%
Self-guided driving tours or road trips	14%
Fall colours	14%
+Exploring Indigenous culture, traditions or history	14%
Shopping for luxury items	13%
Agricultural or country farm tours	13%
Guided boat tours	12%
Road cycling	12%
Mountain biking	12%
Scuba diving	12%
Live shows or sporting events	11%
Spa or wellness centres	10%
Guided airplane or helicopter tours	9%
Breweries or wineries	8%
Downhill skiing or snowboarding	8%
Casual biking	8%
Kayaking, canoeing or paddle boarding	8%
Snowshoeing or cross country skiing	7%
Golfing	7%
Renting a recreational vehicle (RV)	6%
Culinary tours or cooking classes	6%
Rodeos	5%
Ziplining	4%
None of the above	2%

+ Aboriginal was changed to Indigenous in 2018 – review trending with caution.
Base: Long-haul pleasure travellers (past 3 years or next 2 years) answering (n=1497)
MP12. Among these activities, are there any that are important enough that you would base an entire trip around that activity?

▲ / ▼ *Significantly higher/lower than 2017 GTW wave.*

Barriers

HIGHLIGHTS

- ✓ *Cost remains the primary deterrent to visiting Canada, followed by visa requirements and length of flight.*
- ✓ *The barrier of not knowing enough about Canada declined significantly in 2018.*
- ✓ *Travellers aged 55-64 have fewer barriers to visiting and are more likely to say nothing will prevent them from travelling to Canada.*

All Indian long-haul travellers were asked what could prevent them from visiting Canada. Cost remains the primary deterrent (30%), followed by visa requirements (24%) and length of flight (21%). Travellers aged 25-44 are more likely than those aged 55-64 to mention safety concerns, distance between destinations, language barrier, poor value for money, and say they have been to all the places they want to go in Canada. Older travellers aged 55-64 are most likely to say nothing will prevent them from visiting Canada.

There is one significant decrease to note in 2018: not knowing enough about Canada was mentioned significantly less often (11%, down from 15%).

A new question added in 2018 asked those concerned about cost to elaborate on specific types of costs. Accommodation costs and the cost of flights to Canada (both 61%) are the greatest cost-related concerns, mentioned considerably more often than any other cost-related barriers. The next most frequently cited concerns include the cost of flights within Canada (36%) and the cost of food and beverage (32%).

Visa requirements is the top barrier among those who have visited Canada in the past (24%), slightly ahead of cost (22%). While cost continues to be an important barrier, past visitors are much less likely to state it as a barrier compared to those who have never been to Canada (42%). Past visitors are also less likely to cite flight length (19% versus 25%) and poor weather (17% versus 22%) as barriers compared to those who have never been. However, they are more likely to mention safety concerns (19% versus 14%), language barriers (15% versus 6%), and to indicate they have been to all the places they want to visit (13% versus 4%).

Key Barriers for Visiting Canada

Cost-Related Barriers to Visiting Canada

Cost of accommodation	**61%**
Cost of flights to Canada	**61%**
Cost of flights within Canada	**36%**
Cost of food and beverage	**32%**
Cost of other transportation (e.g. buses, shuttles, trains)	**27%**
Cost of car or RV rentals	**26%**
Cost of recreation and entertainment activities	**24%**
Cost of clothes and gifts	**18%**
Don't know	**2%**

+ New question added in 2018 – no trending
Base: Long-haul pleasure travellers (past 3 years or next 2 years) who mentioned cost as a barrier (n=448)
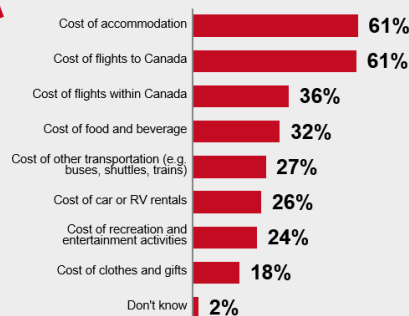*+QMP9b. You mentioned that cost might discourage you from visiting Canada. Are there any specific types of costs that might discourage you?*

Cost	**30%**
Visa requirements	**24%**
Too far/flight too long	**21%**
Poor weather	**19%**
+Unfavourable conditions for driving during winter	**18%**
Safety concerns	**17%**
Health risks	**17%**
Not enough time to take a vacation	**14%**
There are other places I would rather visit	**14%**
+Unable to take holiday during months when I want to visit Canada	**13%**
Destinations and attractions too far apart	**12%**
Delays and hassles at airports and borders	**12%**
Unfavourable exchange rate	**12%**
Language barrier/don't speak my language	**11%**
Don't know enough about it	**11%**
Poor value for money	**10%**
There is no reason to visit anytime soon	**10%**
Have been to all the places I wanted to go in Canada	**10%**
Nothing would prevent me from travelling to Canada	**14%**

▲ / ▼ *Significantly higher/lower than 2017 GTW wave.*
+ New statement added in 2018 – no trending
Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=1501)
QMP9. Which of the following factors might discourage you from visiting Canada?

Recent Trip Profile

> ***HIGHLIGHTS***
> - ✓ *While still the most common way to book flights and accommodation for trips to Canada, travel agent/tour operator use is down significantly.*
> - ✓ *Recent visitors to Canada are staying at luxury hotels less often, even though this continues to be the most popular type of accommodation, while rented houses/apartments are trending upwards in popularity.*
> - ✓ *Overnight stays in the US as part of a trip to Canada have declined significantly over the three years of tracking.*

The following section provides details on the most recent long-haul trip taken by Indian travellers to competitive set destinations in the past 3 years (71% took such a trip). If the most recent trip encompassed more than one destination, the data reflects where the most time was spent.

Trip Purpose

The primary reason for travelling among all Indian long-haul travellers to any destination continues to be for holiday purposes (47%), followed by visiting family and friends (26%).

Consistent with 2017, going on a holiday (53%) continues to be the primary purpose for taking a trip specifically to Canada, a wide margin ahead of visiting family and friends (20%) and combine business/personal reasons (14%).

Mentions of education as the primary reason for travelling are up significantly in 2018 for trips in general (5%, up from 2%) and for trips to Canada (5%, up from 1%).
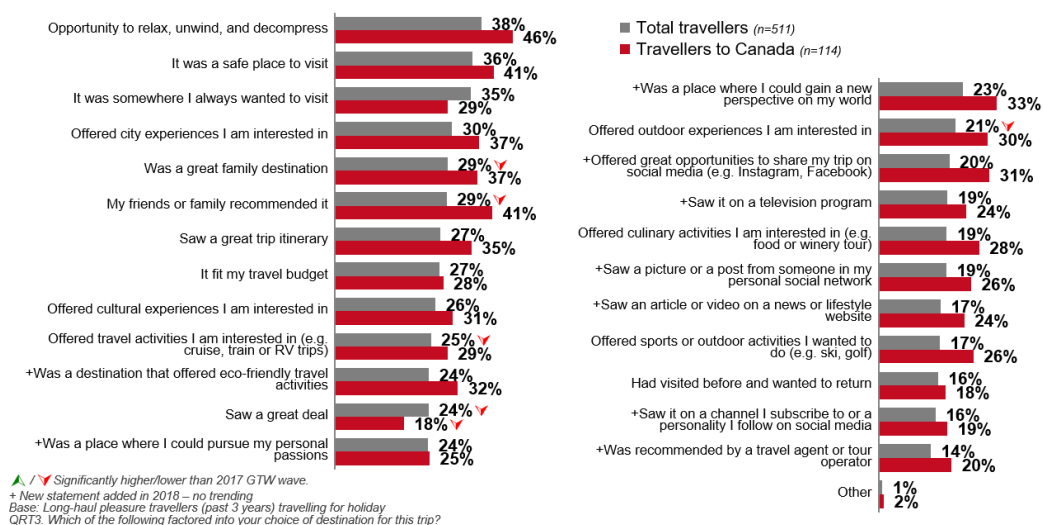
Motivators

Those travelling for holiday purposes were asked about factors which influenced their choice of destination.

The opportunity to relax remains the primary reason for selecting the holiday destination among Indian travellers generally (38%), followed by safe place to visit (36%) and a longstanding desire to visit (35%). Those who have visited Canada also mention the opportunity to relax (46%) as their top motivation; this is followed by safe place to visit (41%) and recommendations from friends or family (41%).

Among all Indian travellers, some factors were mentioned significantly less often in 2018, including: being a great family destination (29%, down from 40% in 2017), a recommendation from family or friends (29%, down from 37% in 2017), offering travel activities of interest (25%, down from 33% in 2017), seeing a great deal (24%, down from 32% in 2017), and offering outdoor experiences of interest (21%, down from 32% in 2017).

Visitors to Canada were less influenced by seeing a great deal in 2018 (18%, down from 41% in 2017).

Factors Influencing Destination Selection

■ Total travellers *(n=511)*
■ Travellers to Canada *(n=114)*

Factor	Total	Canada
Opportunity to relax, unwind, and decompress	38%	46%
It was a safe place to visit	36%	41%
It was somewhere I always wanted to visit	35%	29%
Offered city experiences I am interested in	30%	37%
Was a great family destination	29%	37%
My friends or family recommended it	29%	41%
Saw a great trip itinerary	27%	35%
It fit my travel budget	27%	28%
Offered cultural experiences I am interested in	26%	31%
Offered travel activities I am interested in (e.g. cruise, train or RV trips)	25%	29%
+Was a destination that offered eco-friendly travel activities	24%	32%
Saw a great deal	24%	18%
+Was a place where I could pursue my personal passions	24%	25%

Factor	Total	Canada
+Was a place where I could gain a new perspective on my world	23%	33%
Offered outdoor experiences I am interested in	21%	30%
+Offered great opportunities to share my trip on social media (e.g. Instagram, Facebook)	20%	31%
+Saw it on a television program	19%	24%
Offered culinary activities I am interested in (e.g. food or winery tour)	19%	28%
+Saw a picture or a post from someone in my personal social network	19%	26%
+Saw an article or video on a news or lifestyle website	17%	24%
Offered sports or outdoor activities I wanted to do (e.g. ski, golf)	17%	26%
Had visited before and wanted to return	16%	18%
+Saw it on a channel I subscribe to or a personality I follow on social media	16%	19%
+Was recommended by a travel agent or tour operator	14%	20%
Other	1%	2%

▲ / ▼ *Significantly higher/lower than 2017 GTW wave.*
+ *New statement added in 2018 – no trending*
Base: Long-haul pleasure travellers (past 3 years) travelling for holiday
QRT3. Which of the following factored into your choice of destination for this trip?

Travel Party

Indian travellers to any long-haul destination travelled solely with their spouse or partner (on a couple's trip) for 22% of total trips. Those travelling with children under the age of 18 accounted for 29% of total trips, while solo travel made up an additional 10% of trips. The remaining 39% of trips were a combination of other travel parties, such as travelling with other family members, friends, or business colleagues.

Among those who travelled to Canada, 23% travelled solely with their spouse or partner. The proportion travelling with children under 18 to Canada is 31%, which represents the largest family travel market for Canada across all of Destination Canada's key markets. Solo travel accounted for an additional 11% of trips. The remainder of trips (35%) consisted of other travel parties.

Travel Party

Spouse or partner only
- Total travellers: 22%
- Travellers to Canada: 23%

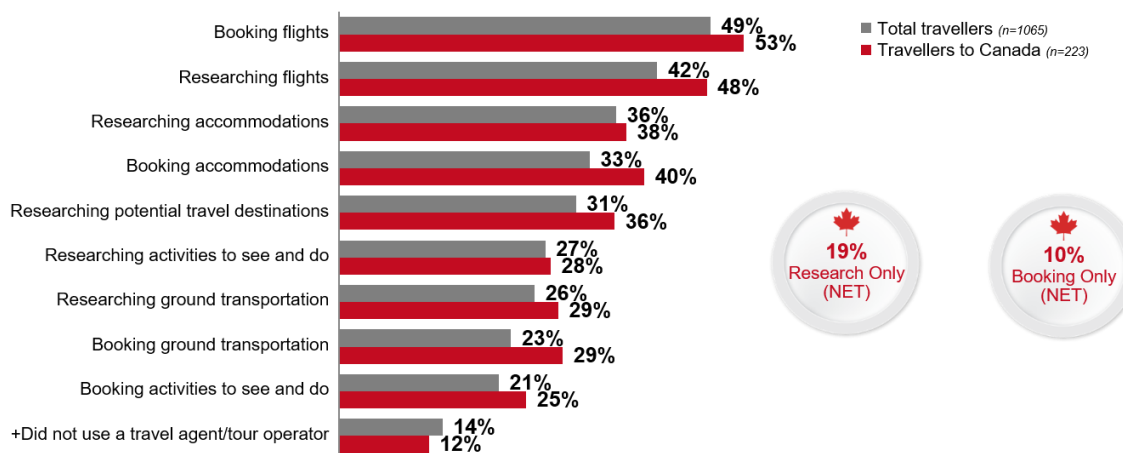**With a child under 18 years old (spouse or other travellers could also be present)**
- Total travellers: 29%
- Travellers to Canada: 31%

Alone/solo
- Total travellers: 10%
- Travellers to Canada: 11%

Other (e.g. friends, other family members)
- Total travellers: 39%
- Travellers to Canada: 35%

■ Total travellers *(n=1065)*
■ Travellers to Canada *(n=223)*
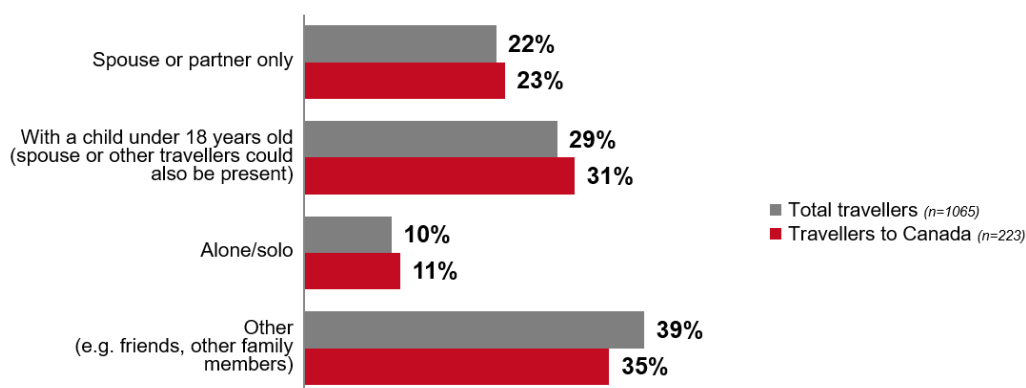
Base: Long-haul pleasure travellers (past 3 years)
QRT4. With whom did you travel on this trip?

Booking

Eighty-six percent of all Indian travellers report consulting a travel agent/tour operator on their most recent long-haul trip for either planning or booking purposes. Travel agent/tour operators are most often used for booking flights (49%) and researching flights (42%). Travellers aged 25-44 are more likely to use travel agents/tour operators (89%) compared to those aged 55-64 (79%).

Travel agent/tour operator use is similar among visitors to Canada (88%). Booking flights (53%) and researching flights (48%) are also the most common uses of travel agents/tour operators for recent trips to Canada.

Travel Agent/Tour Operator Usage

	Total travellers *(n=1065)*	Travellers to Canada *(n=223)*
Booking flights	49%	53%
Researching flights	42%	48%
Researching accommodations	36%	38%
Booking accommodations	33%	40%
Researching potential travel destinations	31%	36%
Researching activities to see and do	27%	28%
Researching ground transportation	26%	29%
Booking ground transportation	23%	29%
Booking activities to see and do	21%	25%
+Did not use a travel agent/tour operator	14%	12%

19% Research Only (NET)

10% Booking Only (NET)

▲ / ▼ Significantly higher/lower than 2017 GTW wave.
+ 'Tour operator' was added to the statement in 2018 – review trending with caution.
Base: Long-haul pleasure travellers (past 3 years)
QRT15. Did you use a travel agent or tour operator to help you with any of the following for this trip?
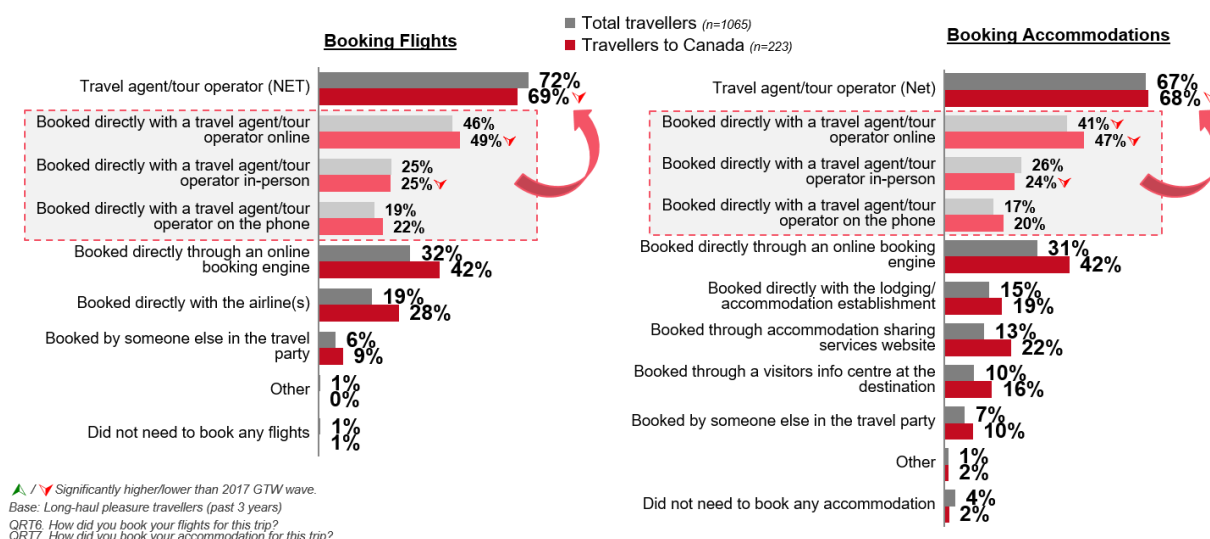
In terms of flights, the most popular way to book a trip to any destination is through a travel agent/tour operator (72%), with booking directly with a travel agent/tour operator online being the most prevalent (46%). This is followed by booking directly through online booking engines (32%).

For trips to Canada, travel agent/tour operator use is on the decline for booking flights (69%, down significantly from 81% in 2017). This decline in travel agent usage for trips to Canada is attributable to significant declines in booking directly with a travel agent/tour operator online (49%, down from 62% in 2017) and booking directly with a travel agent/tour operator in-person (25%, down from 35% in 2017).

For accommodation, booking with a travel agent/tour operator is also most popular (67%), with booking directly with a travel agent/tour operator online being the most common method (41%), although usage is down significantly (from 46% in 2017). This is followed by booking via an online booking engine (31%) and through a travel agent/tour operator in-person (26%).

Among those who visited Canada, travel agent/tour operator use dropped significantly in 2018 (68%, down from 77% in 2017), with significant declines for booking directly with a travel agent/tour operator online (47%, down from 59%) and in-person (24%, down from 34%).

Booking of Flights and Accommodations

Booking Flights

■ Total travellers *(n=1065)*
■ Travellers to Canada *(n=223)*

	Total	Canada
Travel agent/tour operator (NET)	72%	69%
Booked directly with a travel agent/tour operator online	46%	49%
Booked directly with a travel agent/tour operator in-person	25%	25%
Booked directly with a travel agent/tour operator on the phone	19%	22%
Booked directly through an online booking engine	32%	42%
Booked directly with the airline(s)	19%	28%
Booked by someone else in the travel party	6%	9%
Other	1%	0%
Did not need to book any flights	1%	1%

Booking Accommodations

	Total	Canada
Travel agent/tour operator (Net)	67%	68%
Booked directly with a travel agent/tour operator online	41%	47%
Booked directly with a travel agent/tour operator in-person	26%	24%
Booked directly with a travel agent/tour operator on the phone	17%	20%
Booked directly through an online booking engine	31%	42%
Booked directly with the lodging/accommodation establishment	15%	19%
Booked through accommodation sharing services website	13%	22%
Booked through a visitors info centre at the destination	10%	16%
Booked by someone else in the travel party	7%	10%
Other	1%	2%
Did not need to book any accommodation	4%	2%

▲ / ▼ Significantly higher/lower than 2017 GTW wave.
Base: Long-haul pleasure travellers (past 3 years)
QRT6. How did you book your flights for this trip?
QRT7. How did you book your accommodation for this trip?

Seventy-nine percent of Indian travellers indicated that at least a portion of their trip was part of an organized group tour. The proportion taking organized group tours among recent travellers to Canada is similar, with 80% indicating that they participated in an organized group tour (down significantly from 92% in 2017).

A large majority of all group tours are booked through a travel agent/tour operator (87%), including those booked to Canada (87%). Organized group tours are most often booked through a travel agent/tour operator online (56%) or through a travel agent/tour operator in-person (34%). Use of a travel agent/tour operator online (65%) is also most common when making group bookings to Canada.
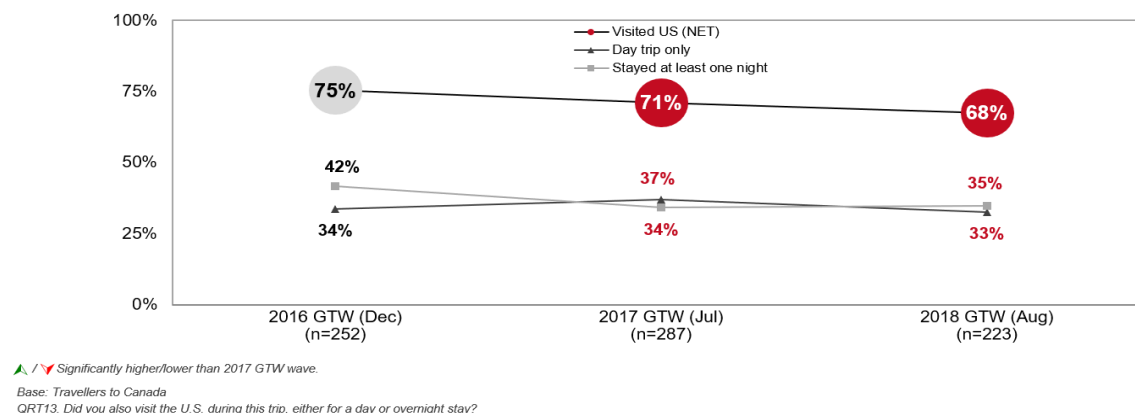
Type of Accommodation

Regardless of destination, Indian travellers continue to show a preference for luxury hotels (36%), followed by mid-priced hotels (30%) and budget hotels (29%).

Recent Indian visitors to Canada also stay at luxury hotels most often (37%), however, this has decreased significantly in 2018 (down from 47% in 2017). Usage of B&Bs has also declined in 2018 among travellers to Canada (25%, down significantly from 34% in 2017). Slowly increasing in popularity are rented houses/apartments which is trending upward from 22% in 2016 to 25% in 2017 and 29% in 2018.

US Visitation

Combining a trip to Canada with a visit to the US is still common among Indian travellers (68%), but is trending downward from 75% in 2016 and 71% in 2017). This downward trend is due to a decline in overnight stays from 42% in 2016 to 37% in 2017 and 35% in 2018; the difference between 2016 and 2018 is a significant decline
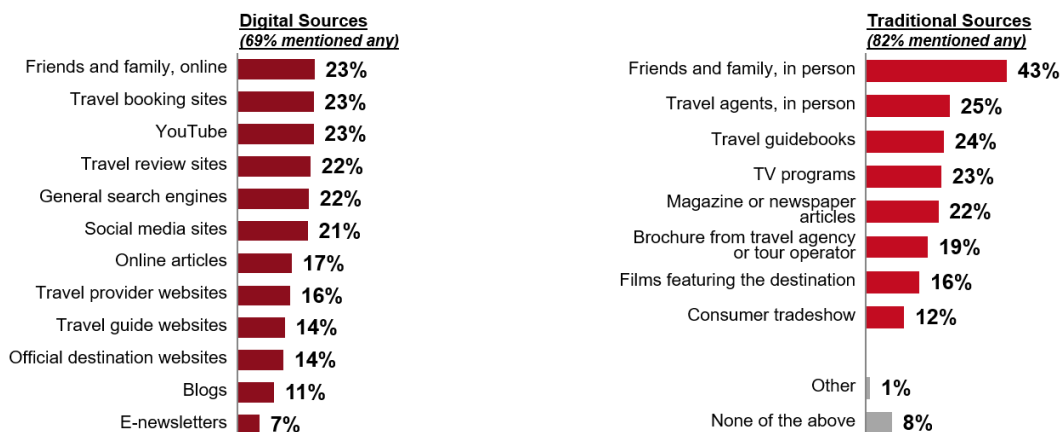
Canada & US Visitation – Trended

▲ / ▼ Significantly higher/lower than 2017 GTW wave.
Base: Travellers to Canada
QRT13. Did you also visit the U.S. during this trip, either for a day or overnight stay?

Information Sources

HIGHLIGHTS
✓ *Friends and family in-person are cited as the most influential source in destination selection by Indian travellers.*

A new question added in 2018 asked Indian travellers whether they had booked a trip in the past three years based on a recommendation from any sources. The top source by a wide margin is personal recommendations from friends and family (43%). This is followed by a number of sources that are all of similar influence including: recommendations from travel agents in-person (25%), travel guidebooks (24%), TV programs (23%), friends and family online (23%), travel booking sites (23%), and YouTube (23%).

Influence of Sources in Destination Selection

Digital Sources
(69% mentioned any)

Friends and family, online	23%
Travel booking sites	23%
YouTube	23%
Travel review sites	22%
General search engines	22%
Social media sites	21%
Online articles	17%
Travel provider websites	16%
Travel guide websites	14%
Official destination websites	14%
Blogs	11%
E-newsletters	7%

Traditional Sources
(82% mentioned any)

Friends and family, in person	43%
Travel agents, in person	25%
Travel guidebooks	24%
TV programs	23%
Magazine or newspaper articles	22%
Brochure from travel agency or tour operator	19%
Films featuring the destination	16%
Consumer tradeshow	12%
Other	1%
None of the above	8%

+ New question added in 2018 – no trending,
Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=1501)
+MT5. In the past 3 years, have you booked a trip based on a recommendation from any of the following sources?