Travel and Tourism in Canada to 2018

Description: Recovering from a deceleration in 2009 due to the financial crisis, Canada's tourism sector flourished during the historic period, with tourist volumes increasing in the years following the crisis. The growth can be attributed to the country's strong economic position and the promotional efforts of the Canadian Tourism Commission (CTC). During the historic period (2009-2013), Canada's domestic tourist volumes expanded at a compound annual growth rate (CAGR) of 4.68%.

- Domestic tourism drives the travel and tourism sector in Canada, which registered growth during the historic period, with the total number of trips rising from 91.4 million in 2009 to 109.7 million in 2013, at a CAGR of 4.68%. The growth was driven by improving economic conditions, rising consumer confidence and higher disposable incomes.

- The total number of inbound tourist arrivals in Canada is expected to reach 19.0 million by 2018, recording a CAGR of 2.67% during the forecast-period. Government initiatives will support the expected growth in inbound tourist volumes. The Canadian government has taken several initiatives to develop and promote Canada's tourist offerings. For example, Nova Scotia's 2014 tourism marketing campaign, which is a multi-year brand campaign first launched in 2013, was also relaunched in March 2014 to attract first-time visitors to Canada in Nova Scotia, attract tourists from north-eastern US and other overseas visitors.

- MICE tourism attracts 2.0 million visitors each year, accounting for total spending in excess of CAD1.7 billion. According to the International Congress and Convention Association (ICCA), Canada was the third-most-popular conference and business tourism destination in Latin and North America in 2013.

- The growing cruise market significantly benefits the British Columbian economy, and generated CAD1.6 billion in 2013. British Columbia is the largest cruise region in Canada, and accounted for 50% of all Canadian cruise traffic, with Vancouver and Victoria as the first- and second-largest cruise ports in the country. According to the Cruise BC Association, in 2013, cruise tourism recorded an increase of 11% in passengers over 2012.

- Canada recorded growth in international arrivals from emerging countries such as Brazil, India and China during the historic period. The main growth drivers included lower oil prices (leading to a reduction in air ticket prices) and increased airline capacity.

- Canada's aviation market performed well during the historic period, with total revenue increasing from CAD19.2 billion (US$16.8 billion) in 2009 to CAD24.1 billion (US$23.4 billion) in 2013, at a CAGR of 5.88%.

- Canada's hotel market profited from an increase in the number of domestic and international visitors during the historic period. Total hotel revenue increased at a CAGR of 1.21% from CAD17.5 billion (US$15.3 billion) in 2009 to CAD18.3 billion (US$17.9 billion) in 2013, with budget hotels recording the highest growth in revenue at a CAGR of 2.32%.

- The Canadian market recorded the highest growth in terms of car-sharing fleet size and membership in the region between January 2012 and January 2013. The total car-sharing fleet in Canada grew by 35.9%, in comparison to 23.6% in the US, while car-sharing membership increased by 53.4%, against 24.1% in the US.

- Canada's travel intermediaries' industry value increased at a CAGR of 3.87%, from CAD25.4 billion (US$22.3 billion) in 2009 to CAD29.6 billion (US$28.8 billion) in 2013. This growth will be driven by increases in leisure and business travel, and the associated rise in online bookings.

Synopsis

The report provides detailed market analysis, information and insights, including:

- Historic and forecast tourist volumes covering the entire Canadian Travel and Tourism sector
- Detailed analysis of tourist spending patterns in Canada for various categories in the Travel and Tourism sector, such as accommodation, sightseeing and entertainment, food service, transportation, retail, travel intermediaries, and others
- Detailed market classification across each category, with analysis using similar metrics
- Detailed analysis of the airline, hotel, car rental, and travel intermediaries industries

Reasons To Buy

- Take strategic business decisions using historic and forecast market data related to Canadian travel and tourism sector
- Understand the demand-side dynamics within Canadian travel and tourism sector, along with key market trends and growth opportunities

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