

# Canada - Travel & Tourism: Leisure driven market (Strategy, Performance and Risk Analysis)

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## Abstracts

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### SUMMARY

The Canadian travel and tourism industry is highly rewarding, with high volume and value growth. Domestic trips increased from US\$108.4 million in 2012 to US\$112.0 million in 2016, while international arrivals increased at a CAGR of 5.1% over 2012-2016.

Due to increasing tourist volumes, passenger airlines in Canada have increased their fleet size and number of seats available. Full service airlines recorded the highest number of seats sold for both leisure and business travels in 2016, with its total seats-sold increasing at a CAGR of 2.3% over 2012-2016. However, due to the depreciation of the Canadian dollar, passenger airlines revenue posted a CAGR of -3.4%, from US\$18.9 billion in 2012 to US\$16.4 billion in 2016.

MarketLine Premium's industry reports provide a comprehensive market view including sections on: risk and reward, key industry trends and drivers, industry SWOT analysis, industry benchmarking to compare key performance indicators with regional and global markets, competitive landscape, industry innovation, deals and key developments.

### KEY HIGHLIGHTS

Leisure activity is expected to contribute majorly over the forecast period

Car rental revenue posted a CAGR of -3.5%, from US\$2,365.5 million in 2012 to US\$2,049.5 million in 2016, but is expected to increase at a CAGR of 1.4% over 2017-2021 to reach US\$2,277.3 million. This is attributed to the country's high utilization rate, rental occasions, and rental days, which have all fuelled growth in the car rental market in Canada. Leisure activity accounted for a 64.7% share, followed by business activity with 33.5% in 2016.

#### Domestic tourism to drive growth in the industry

Total revenue from hotels observed a CAGR of -1.5%, from US\$17.6 billion in 2012 to US\$16.6 billion in 2016, but is expected to increase at a CAGR of 6.5% over 2017-2021 to reach US\$22.9 billion. The growing domestic tourism market, coupled with growth in travelers, will support the growth of hotels over the forecast period. In 2016, upscale hotels accounted for a 45.8% share, followed by midscale hotels with 35.3%. They are expected to increase to 46.1% and 35.6% respectively by 2021.

In-store and online revenue segments are expected to increase over the forecast period

Total revenue from travel intermediaries posted a CAGR of -3.2%, from US\$28.4 billion in 2012 to US\$24.9 billion in 2016, but is expected to increase at a CAGR of 7.0% over 2017-2021 to reach US\$35.4 billion. This is attributed to the increase in online segment revenue, as the demand for internet and online bookings is increasing.

## SCOPE

**Risk & Reward Index** - The Risk & Reward index compares the lucrativeness of the Canadian travel and tourism industry vis-?-vis other countries in the region in terms of specific risk and reward parameters.

**Industry Snapshot and Industry View** - Key travel and tourism industry statistics, including total revenue and expenditure for key industry segments, and the trends driving market performance in the Canadian travel and tourism market.

**Industry SWOT Analysis** - Discover the strengths, weaknesses, opportunities and threats impacting market performance and investment in the Canadian travel and tourism market.

**Industry Benchmarking** - Benchmark how the Canadian travel and tourism market has performed compared to regional and global markets in terms of car

rental fleet size, car rental revenue, number of hotels, hotel revenue, passenger airline revenue, seats available and seats sold, revenue of travel intermediaries and tourism expenditure growth.

Competitive Landscape - Overview of the relevant players in the Canadian travel and tourism industry, such as airlines, hotels and car rental companies, with each player in the relevant category compared with its peers in terms of relevant industry indicators.

## **REASONS TO BUY**

How is the market performing in terms of indicators such as total tourist visits, passenger airline seats sold, seats sold by purpose of visit such as leisure, revenue, room nights available, room nights occupied, hotel revenue, car rental days among others.

How risky is it to invest in the Canadian travel and tourism industry compared to other countries in the North America?

What is driving the performance of key industry segments such as passenger airlines, accommodation and car rentals?

Who are the leading players in the Canadian travel and tourism industry and their overview and product portfolio?

What trends are being witnessed within the Canadian travel and tourism industry?

What are the Canadian travel and tourism industry's Strengths and Weaknesses and what Opportunities and Threats does it face?

What are the recent developments and innovations in the Canadian travel and tourism industry?

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