



# Travel, Hospitality & Leisure market update The Tourism Congress 2012

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# Today's discussion

- Market update
- What's next?
- Three hot spots
  - Stratford
  - London Olympics
  - Malaysia
- Panel discussion



# Market update



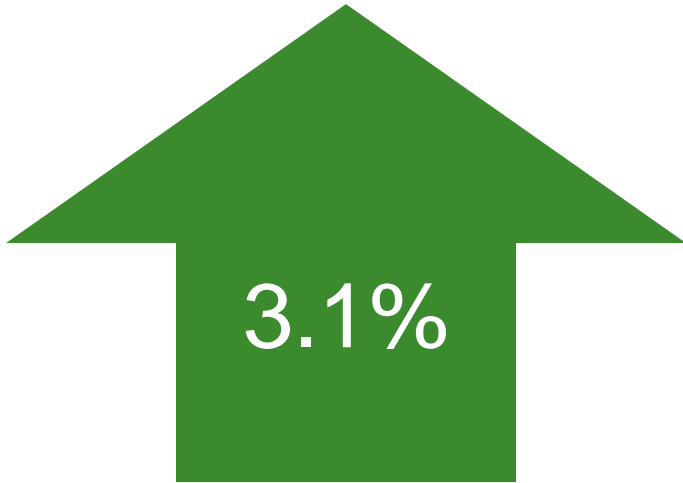
# Canada: Positive arrivals momentum globally

Arrivals:

Jul '10 – Jun '11 vs. Jul '11 – Jun '12



\*2010 vs. 2011

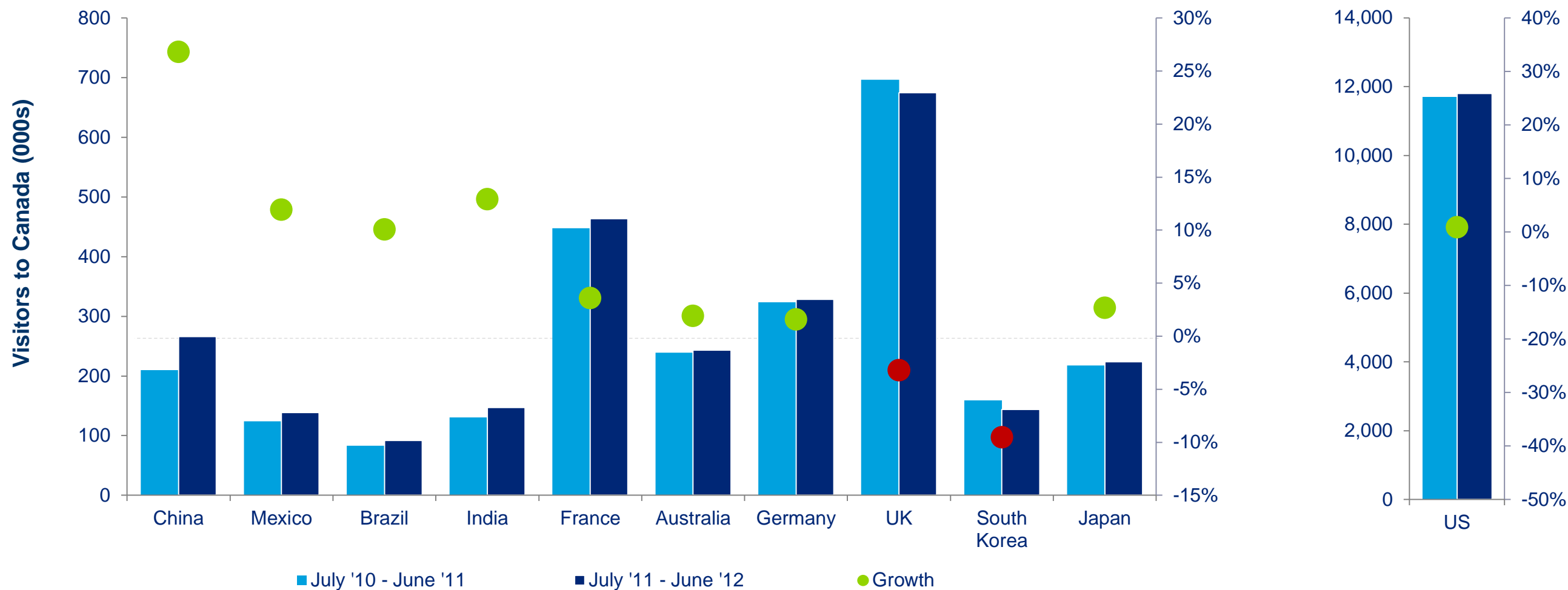


All other countries

Source: Statistics Canada

# Emerging markets fuel Canada's arrivals growth

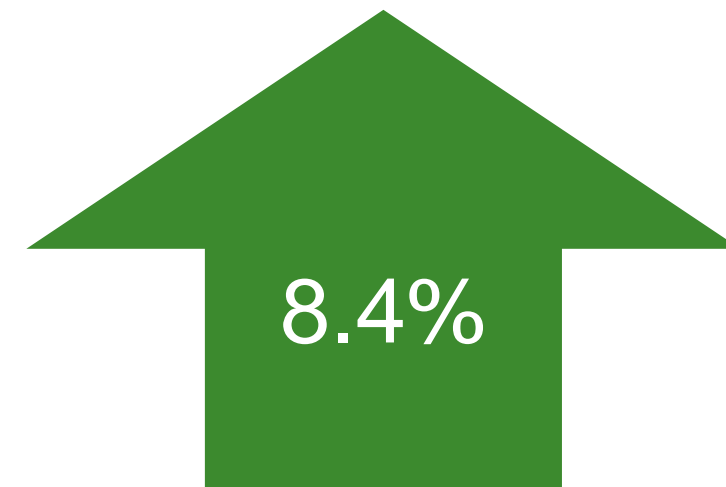
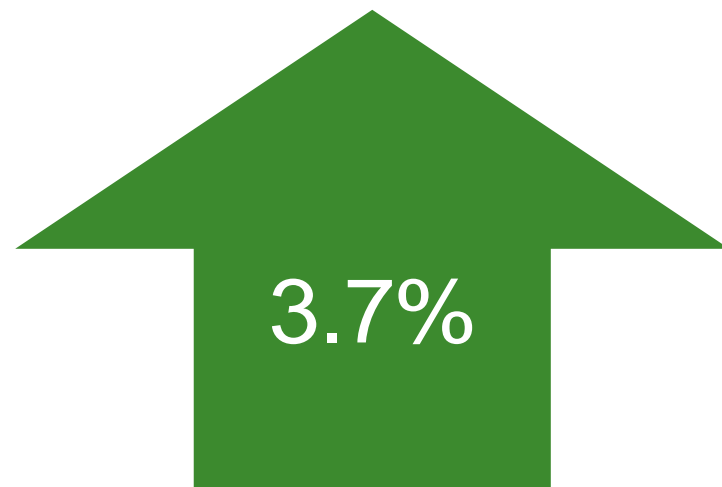
Canadian arrivals from key international markets  
July 2010 – June 2011 vs. July 2011 – June 2012



Source: Canadian Tourism Commission – Tourism Snapshot

# Canada: Strong receipts growth from overseas

Receipts: Jul '10 – Jun '11 vs. Jul '11 – Jun '12

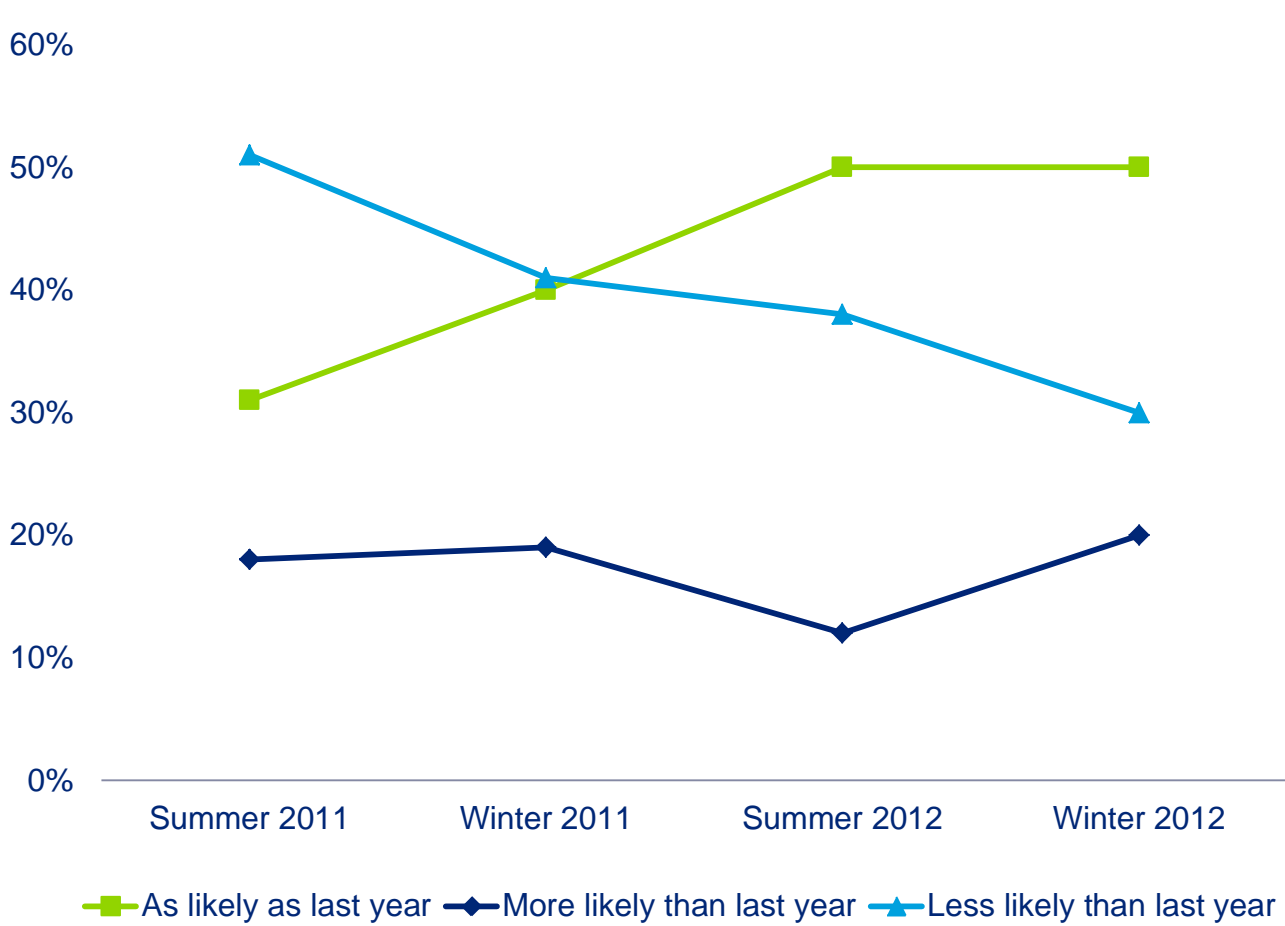


All other countries

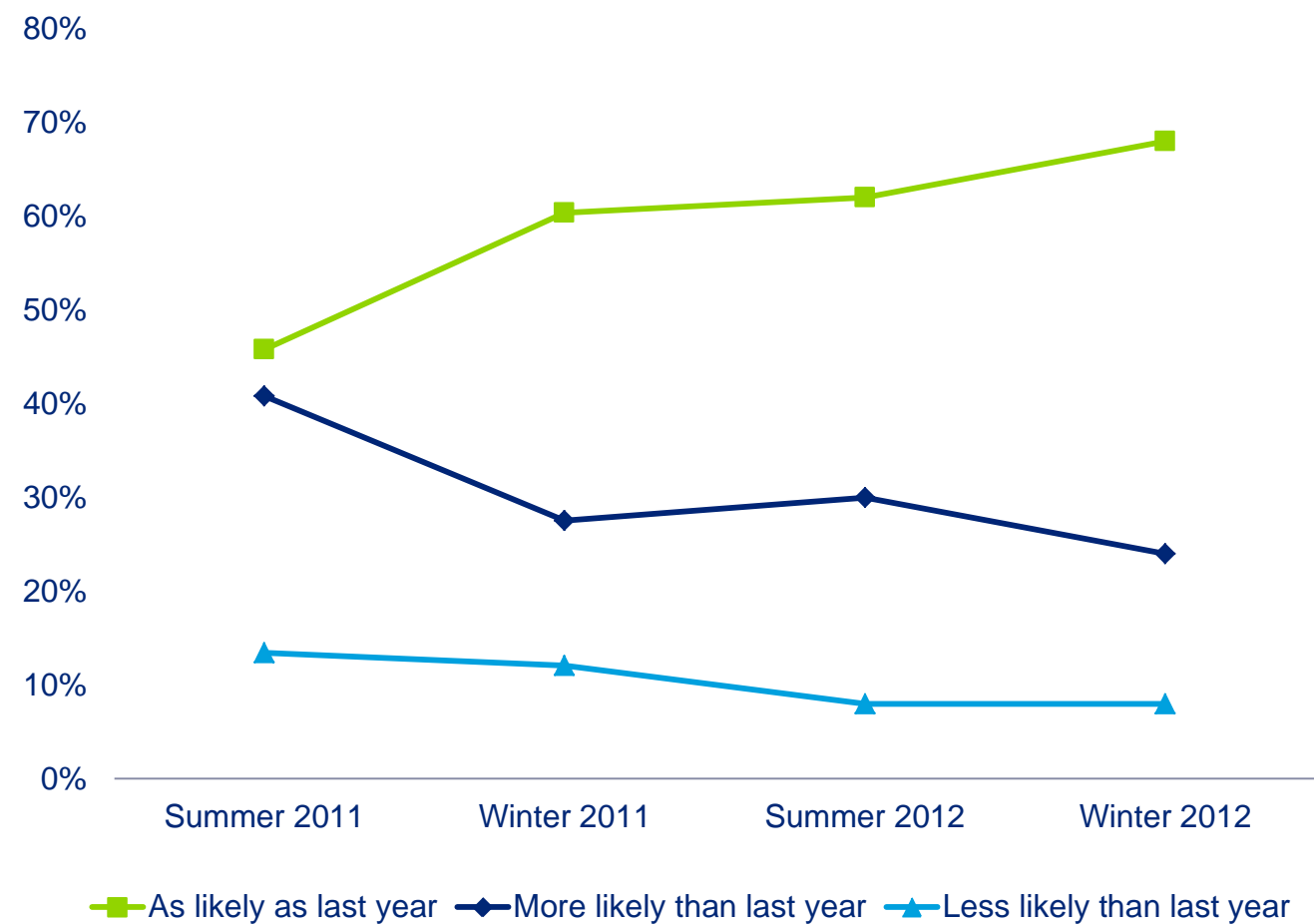
Source: Statistics Canada

# Leisure travel intentions by Canadians

International travel intentions (excluding U.S.): Personal vacation next 12 months

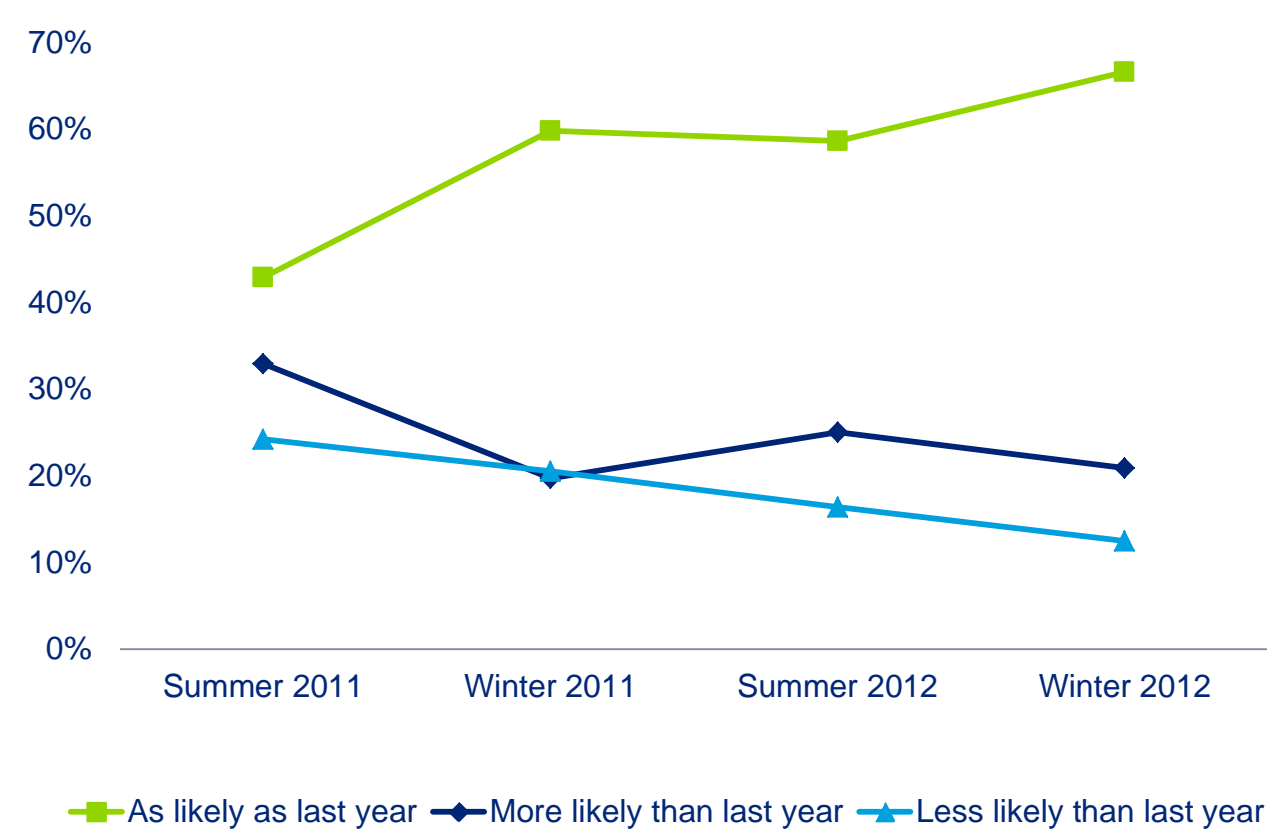


Domestic travel intentions: Personal vacation next 12 months

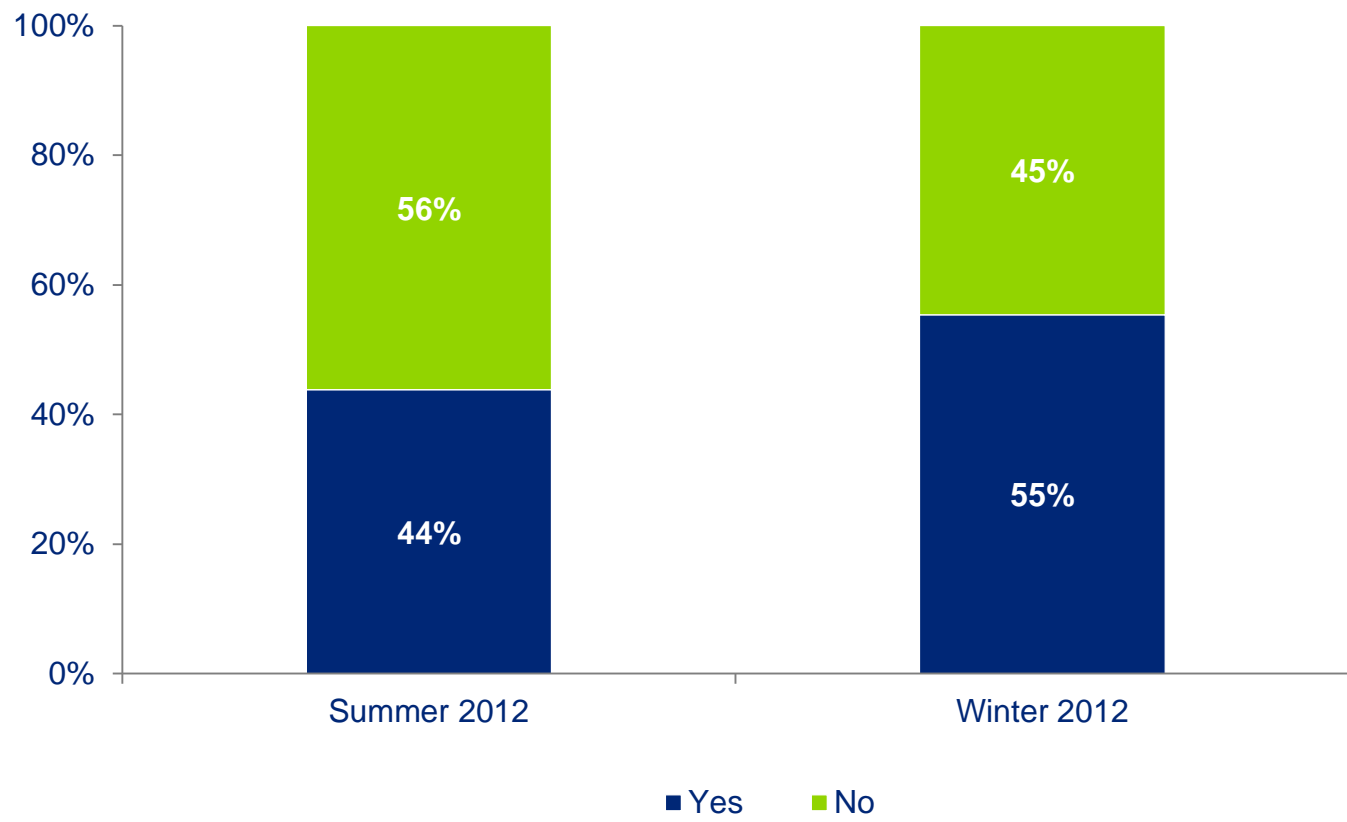


# Business travel intentions by Canadians

Domestic travel intentions: Business travel next 12 months



Do you plan to take personal time before, during or after your business trip?





# A little west... then much further east...

- Stratford Shakespeare Festival
- London 2012 Olympics
- Malaysia



# Innovative and pragmatic approaches can be combined for success



@stratfest

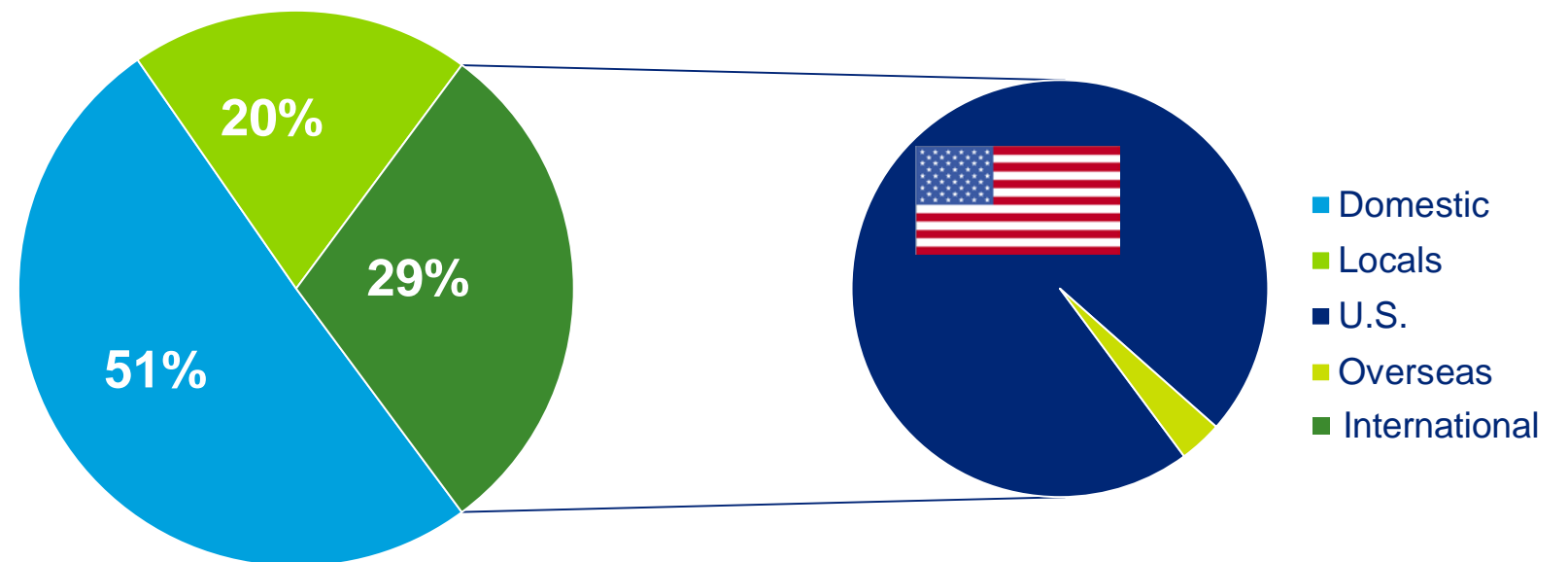
**Stratford Shakespeare Festival uses digital media to better connect with its loyal following of American visitors**



## Results

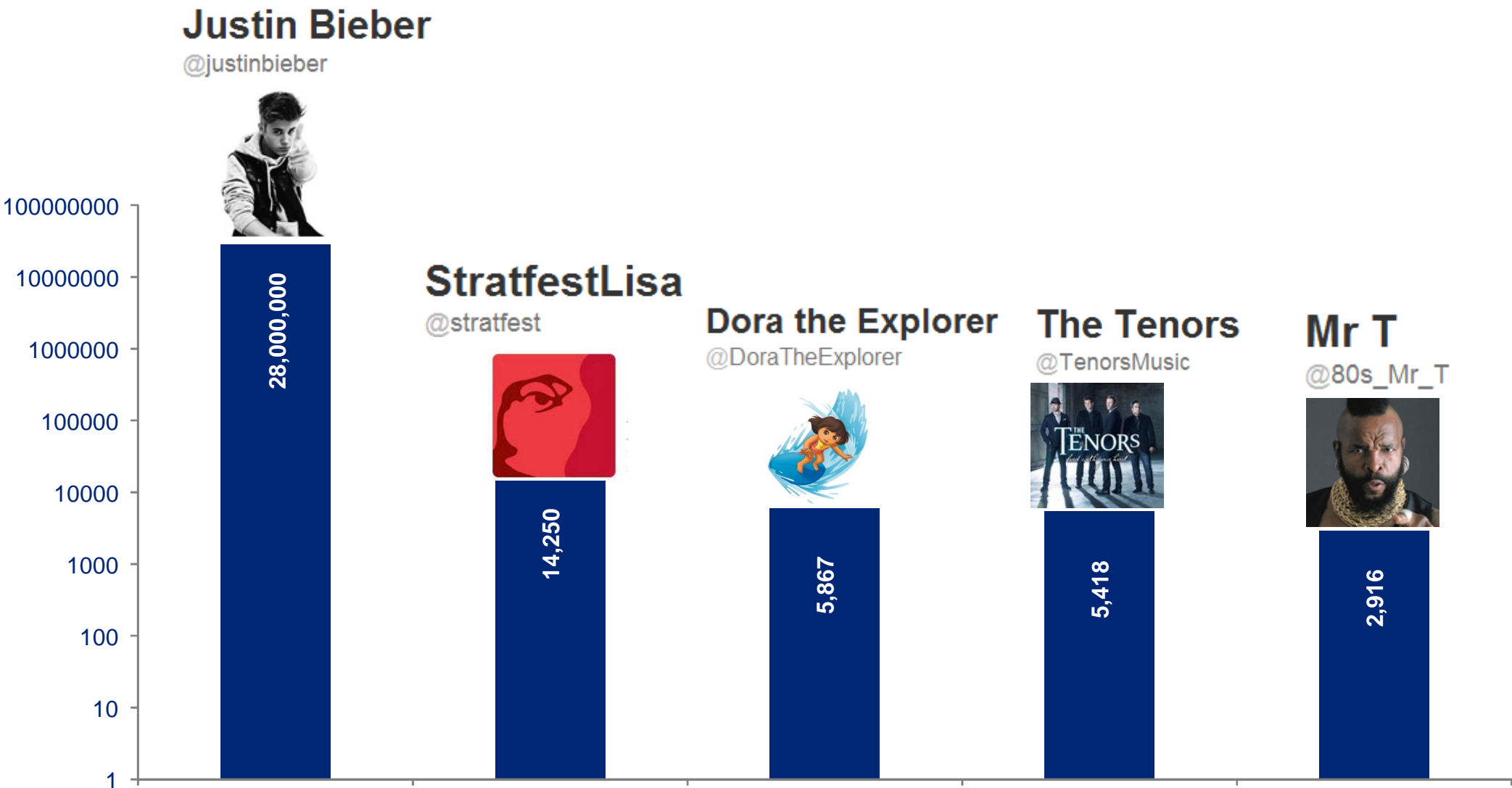
- 40% of tickets and more than 6,000 room nights are booked annually online
- 9 out of 10 tourists are drawn to the Stratford area by the festival
- Facebook page allows visitors to purchase tickets and see where their friends are seated

## Visitor profile



Source: The Strategic Counsel

Twitter followers as of September 28, 2012



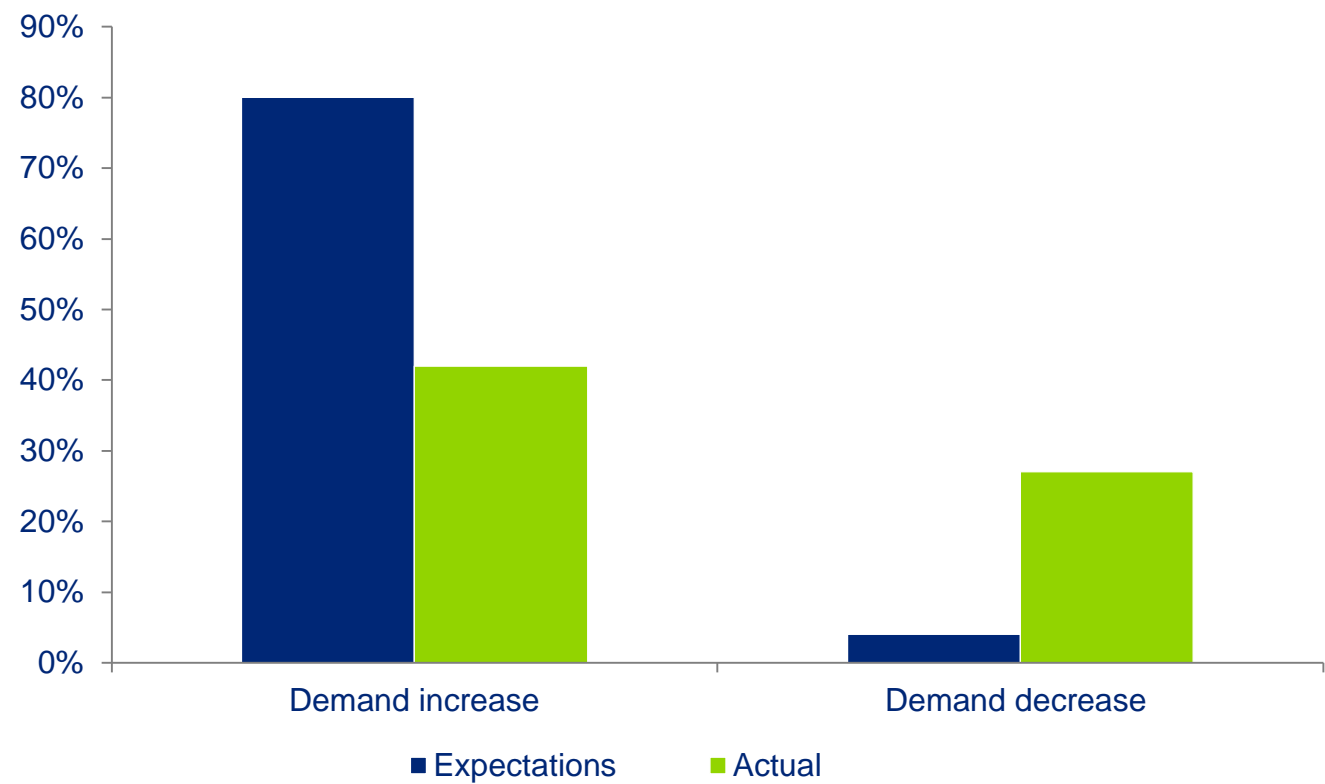
# London 2012 Olympics



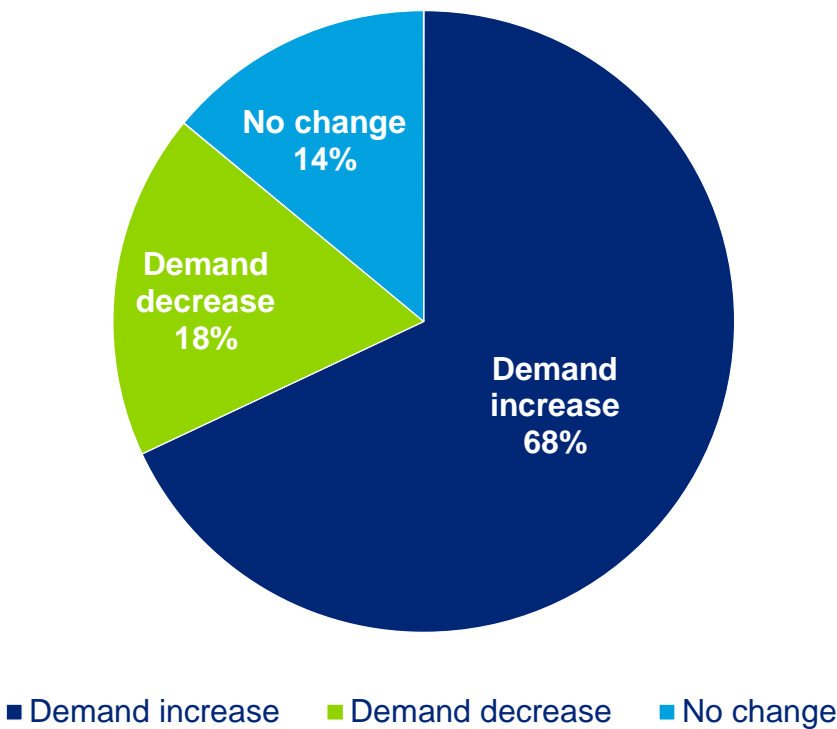
Incremental visitor spending (millions)	Games effect	Legacy effect	Total
London	£284	£694	£978
England (excluding London)	£280	£250	£530
Scotland	£45	£62	£107
Wales	£49	£14	£63
Northern Ireland	£5	£1	£6
<b>Total</b>	<b>£663</b>	<b>£1,021</b>	<b>£1,684</b>

# London 2012 Olympics (continued)

Actual demand increases fell well short of expectations in the overall business sector

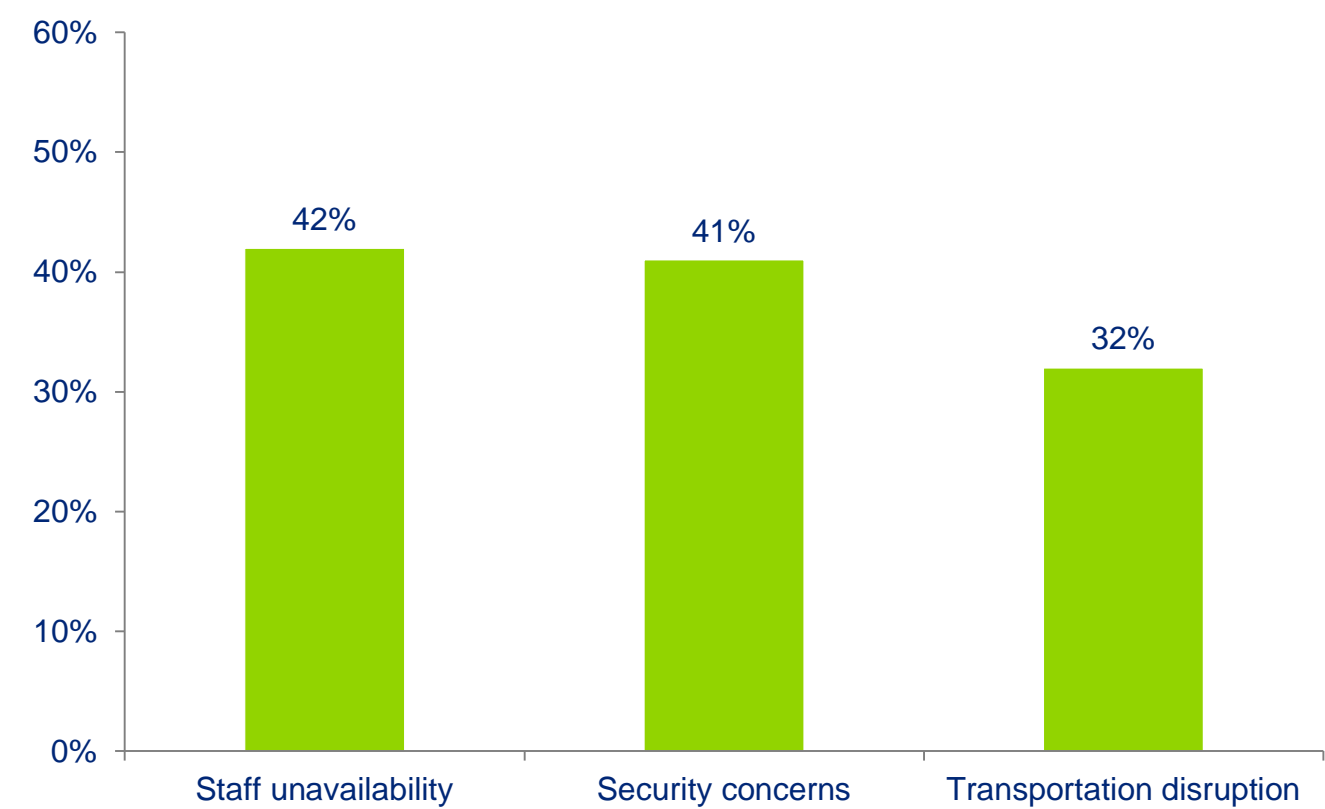


Impact of 2012 London games on travel, hospitality and leisure industry



# London 2012 Olympics (continued)

Expected challenges arising from surge in visitors to Games



Mitigation strategies to combat expected challenges



# Malaysia



## Malaysia's international tourist arrivals and tourism receipts



**Deloitte.**