



# EUROPEAN TRAVEL COMMISSION TRANSATLANTIC CONFERENCE

*Canada in a “Sweet Spot” for Outbound Travel*

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# Canadian Travelers are:

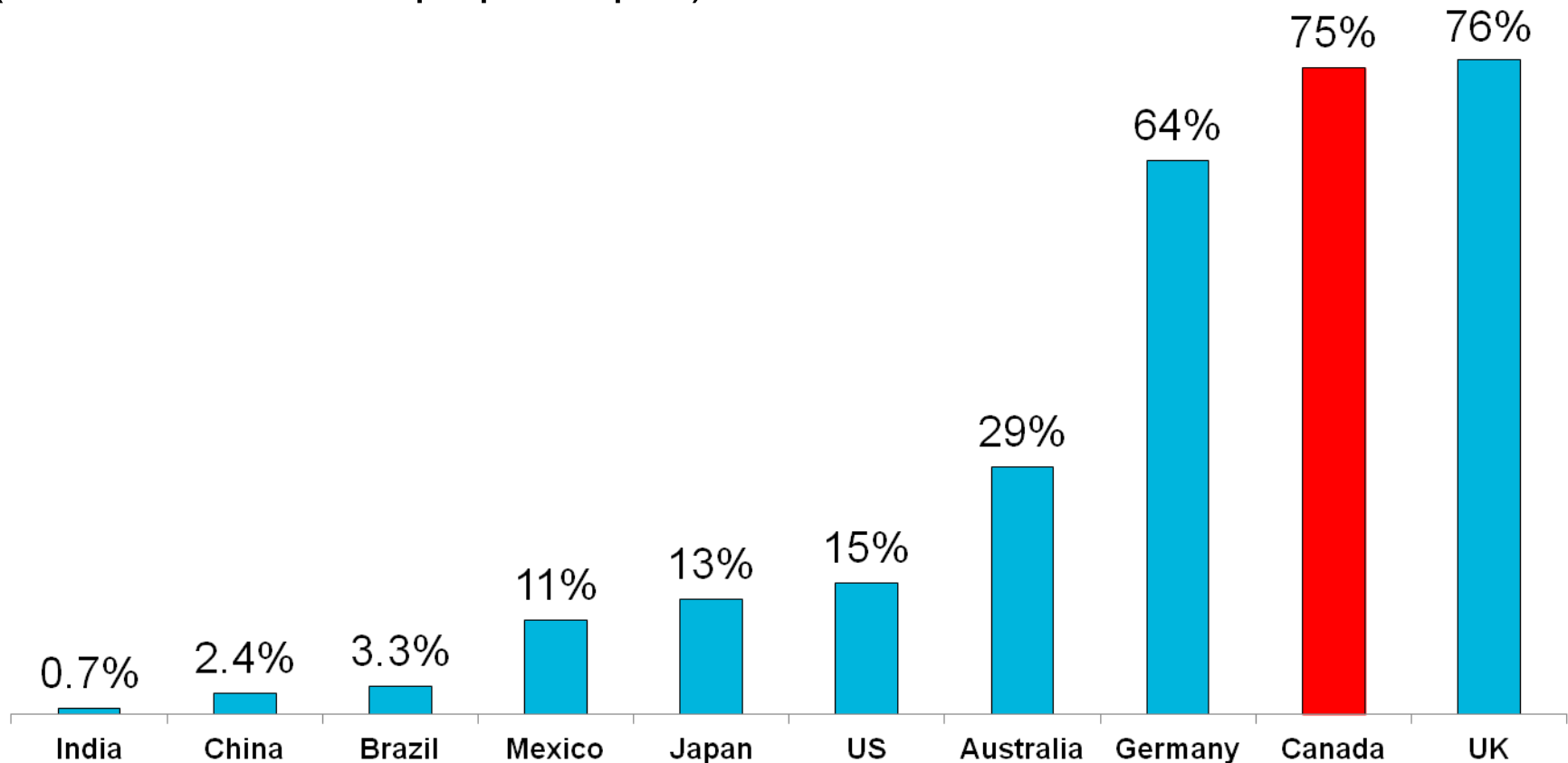
- getting older,
- more countries have opened their doors to tourism
- US “back to the future”





# Canadians Love to Travel

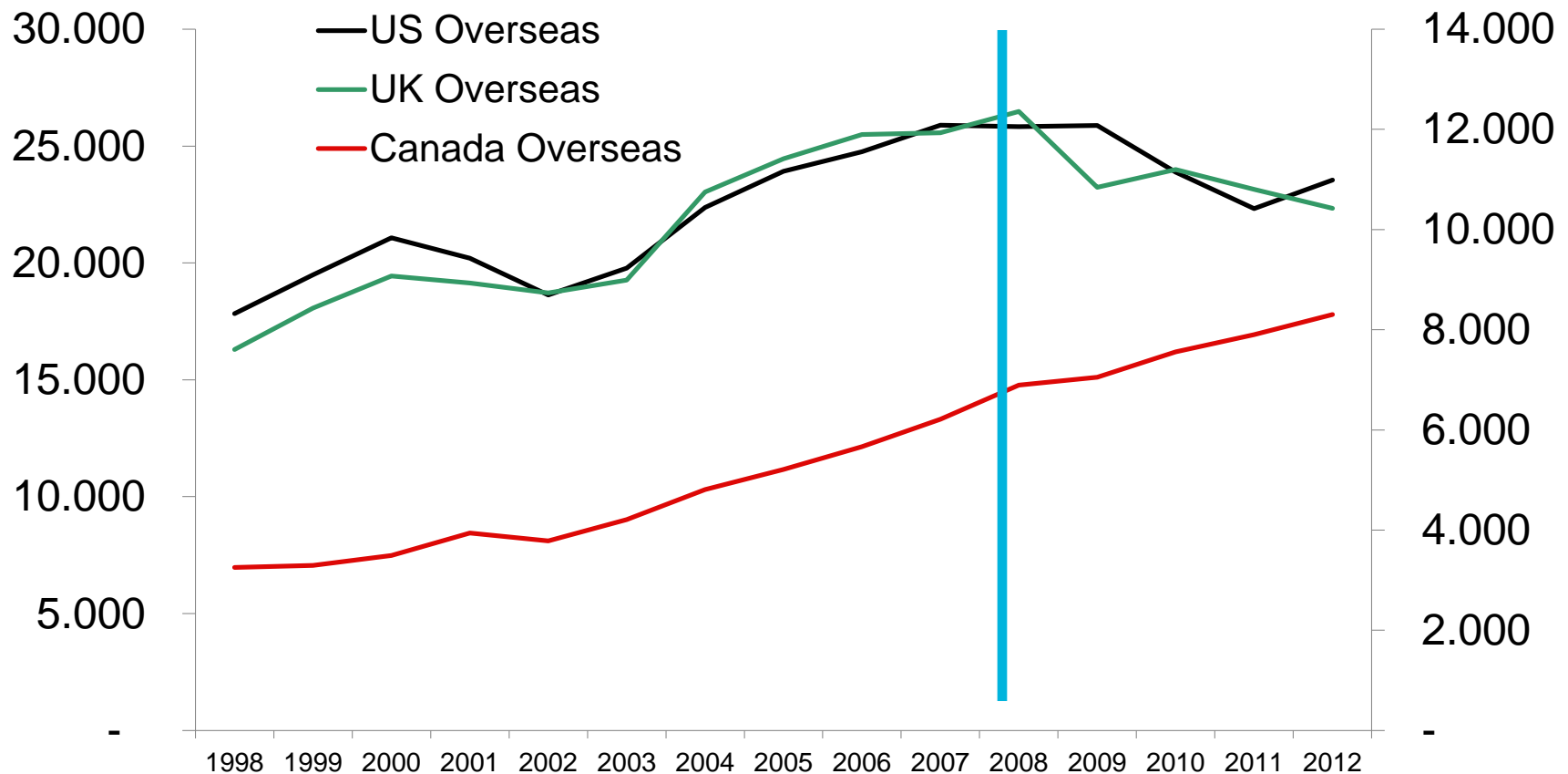
(outbound leisure trips per capita)



Sources: Respective Governments and CBoC calculations for 2011 or 2012.



# Overseas leisure trips: US & UK yet to reach pre-recession level of trips

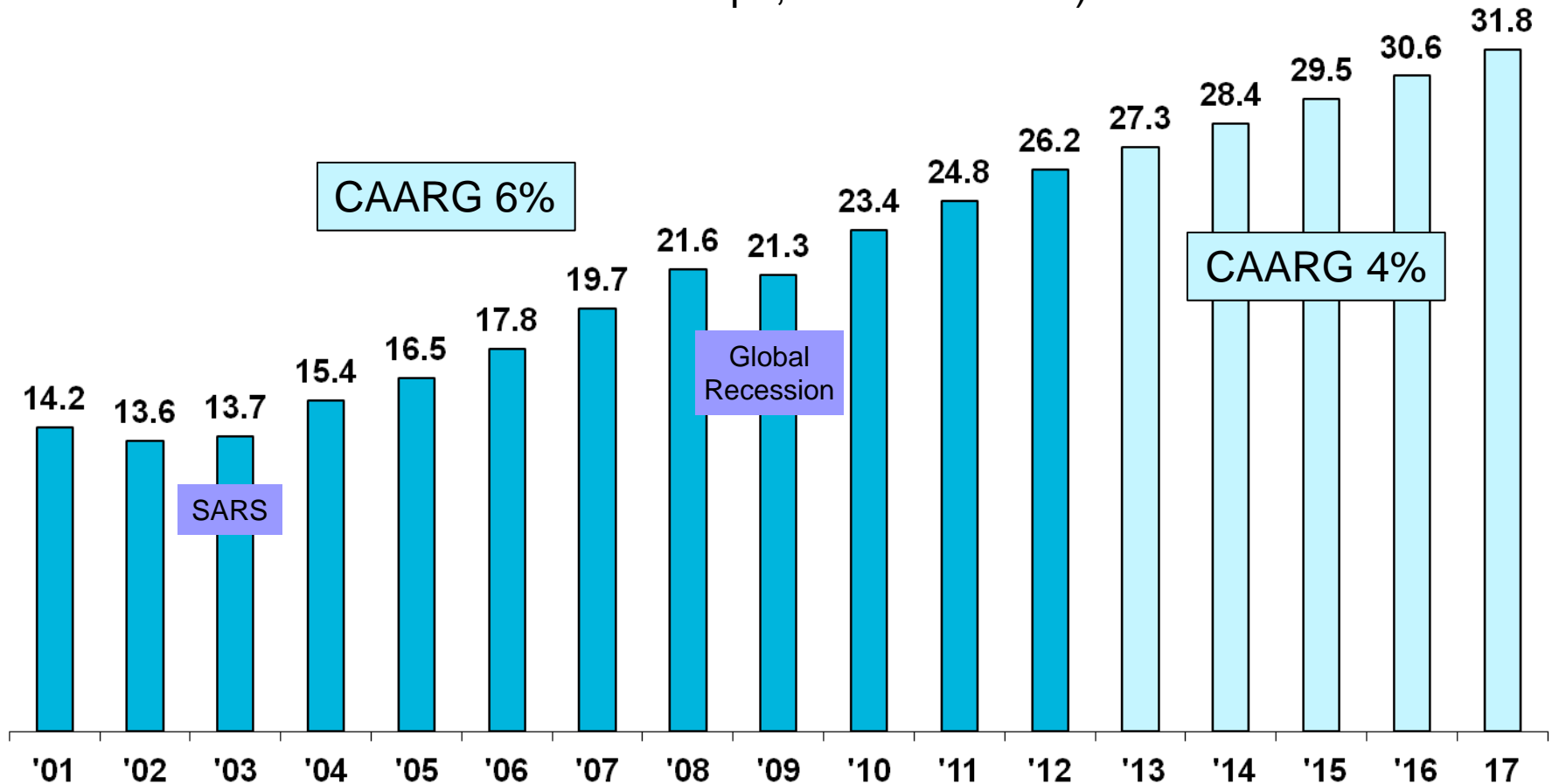


Source: CBoC, UK ONS & US OTTI



# Positive Growth Next Five Years

(millions of Canadian outbound leisure trips, all destinations)

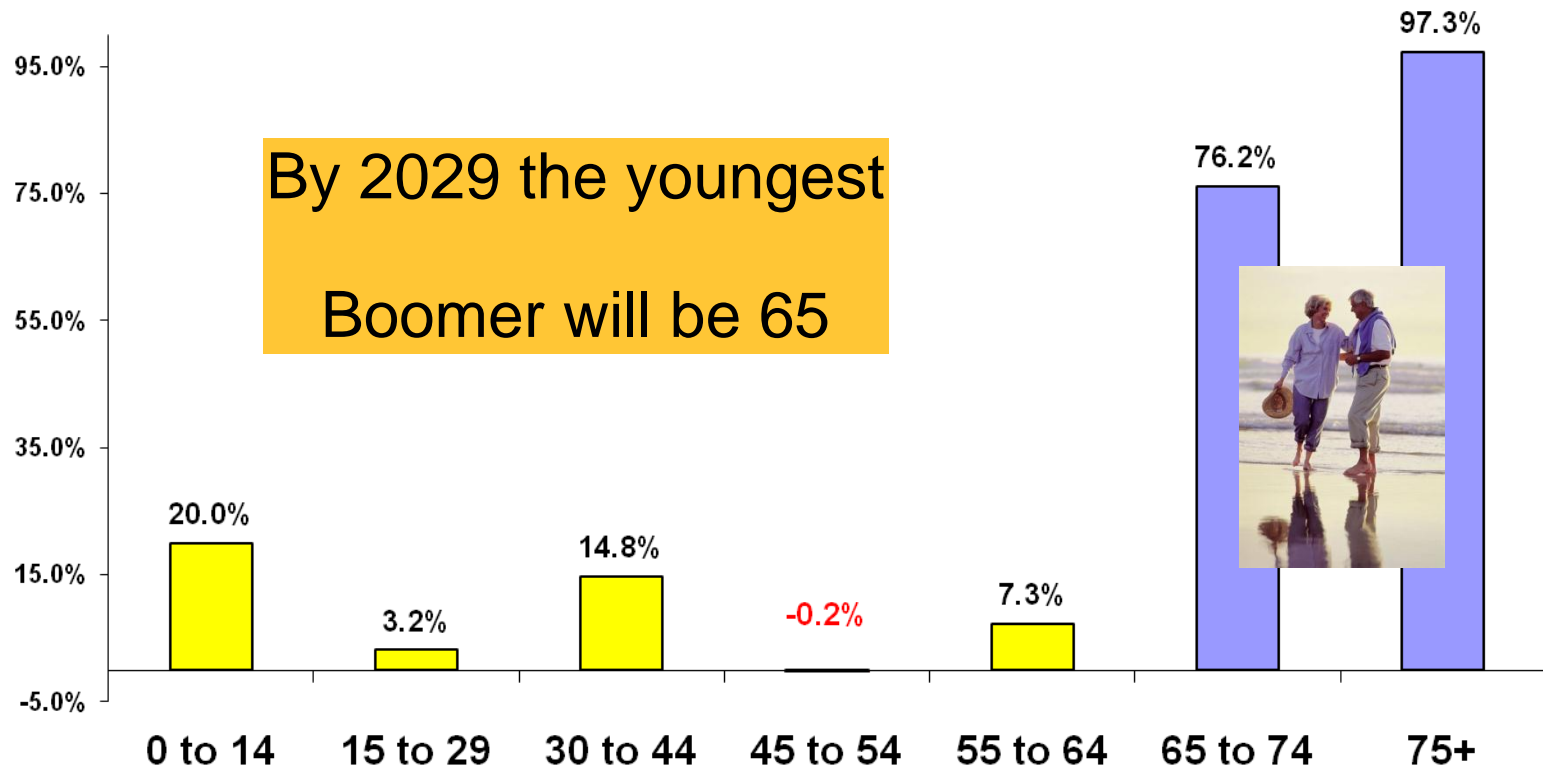


Source: Statistics Canada & CBoC



# Canada's Aging Population

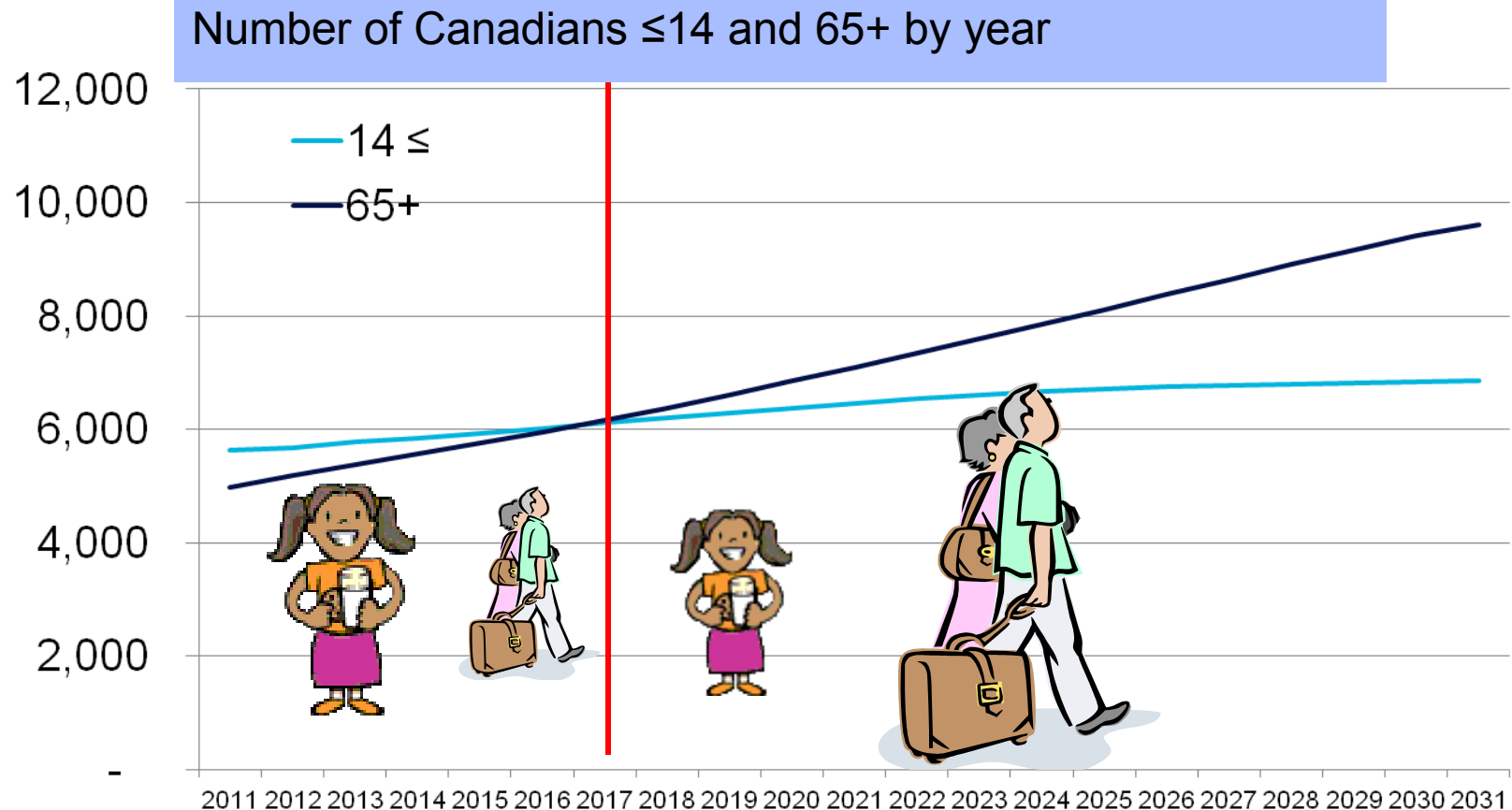
(% growth in population by age group between 2012 and 2031)



Source: CBoC calculations from Statistics Canada projections.



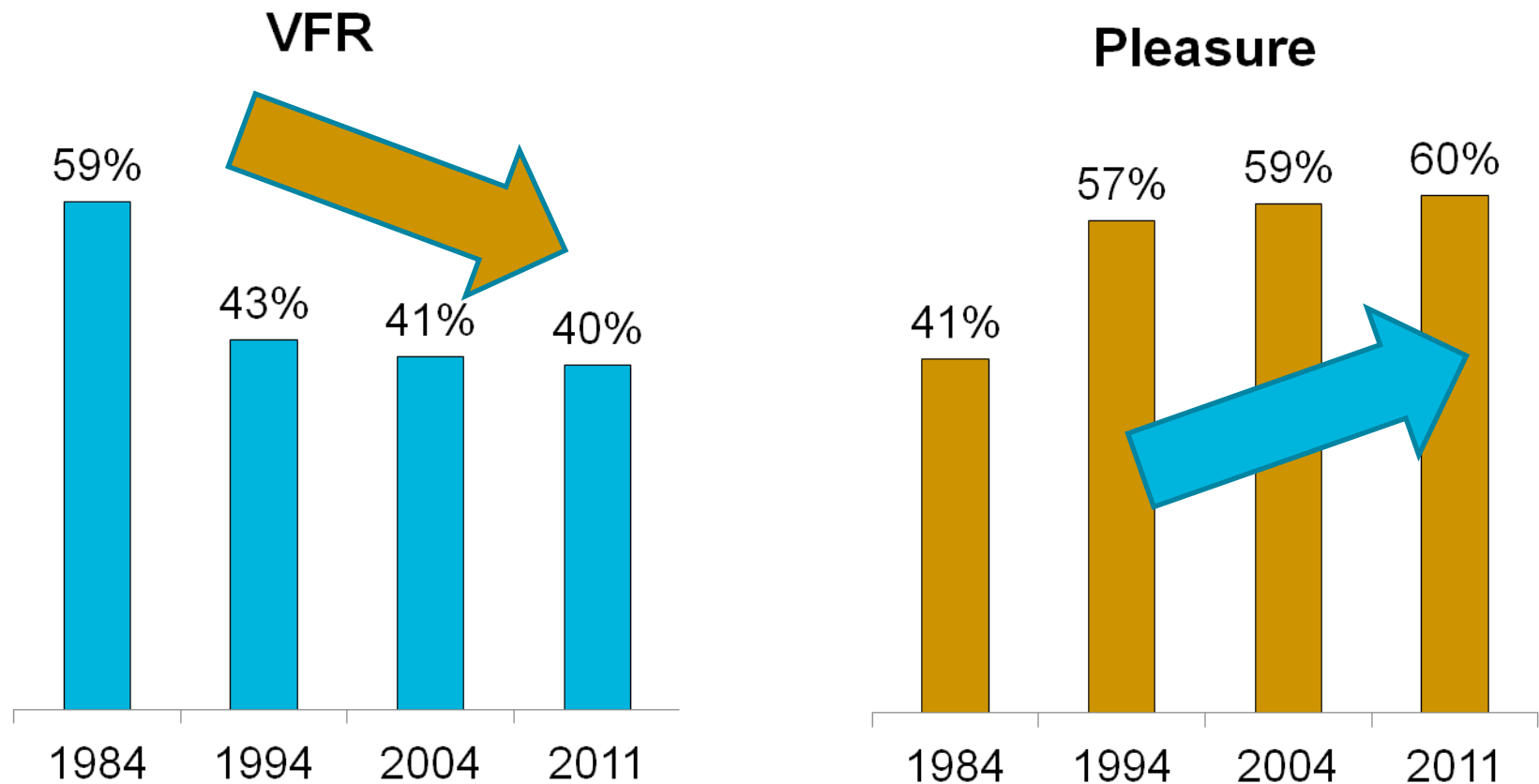
# More Seniors than children by 2017 – *first time in history*





# Europe: Transformation of Canadian leisure market from VFR to Pleasure

(% of leisure trips to Europe VFR vs. Pleasure)

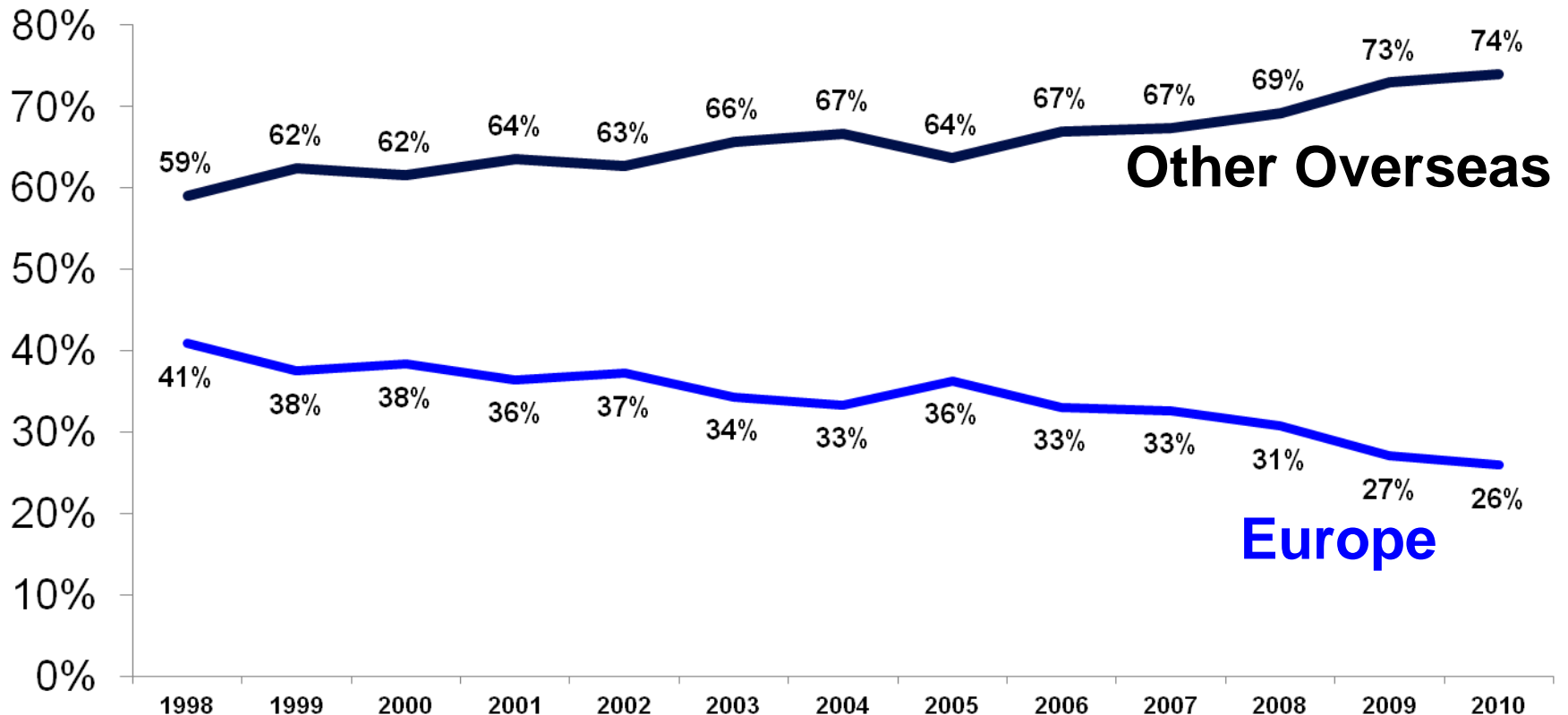






# Europe has lost Canadian leisure visit share to other overseas countries

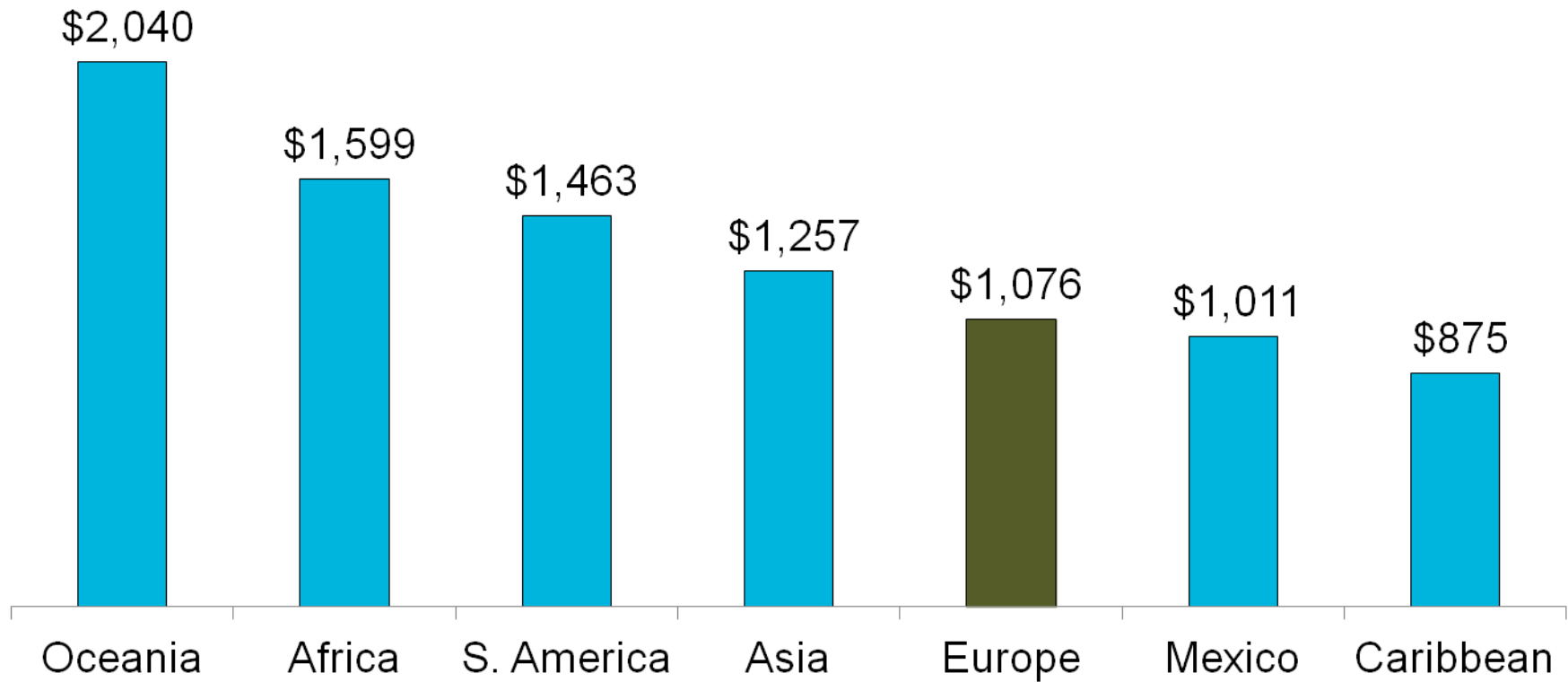
% of Canadian leisure trips to Europe vs. other Oversea countries





## Europe: Canadian spend more visiting Asia/Oceania

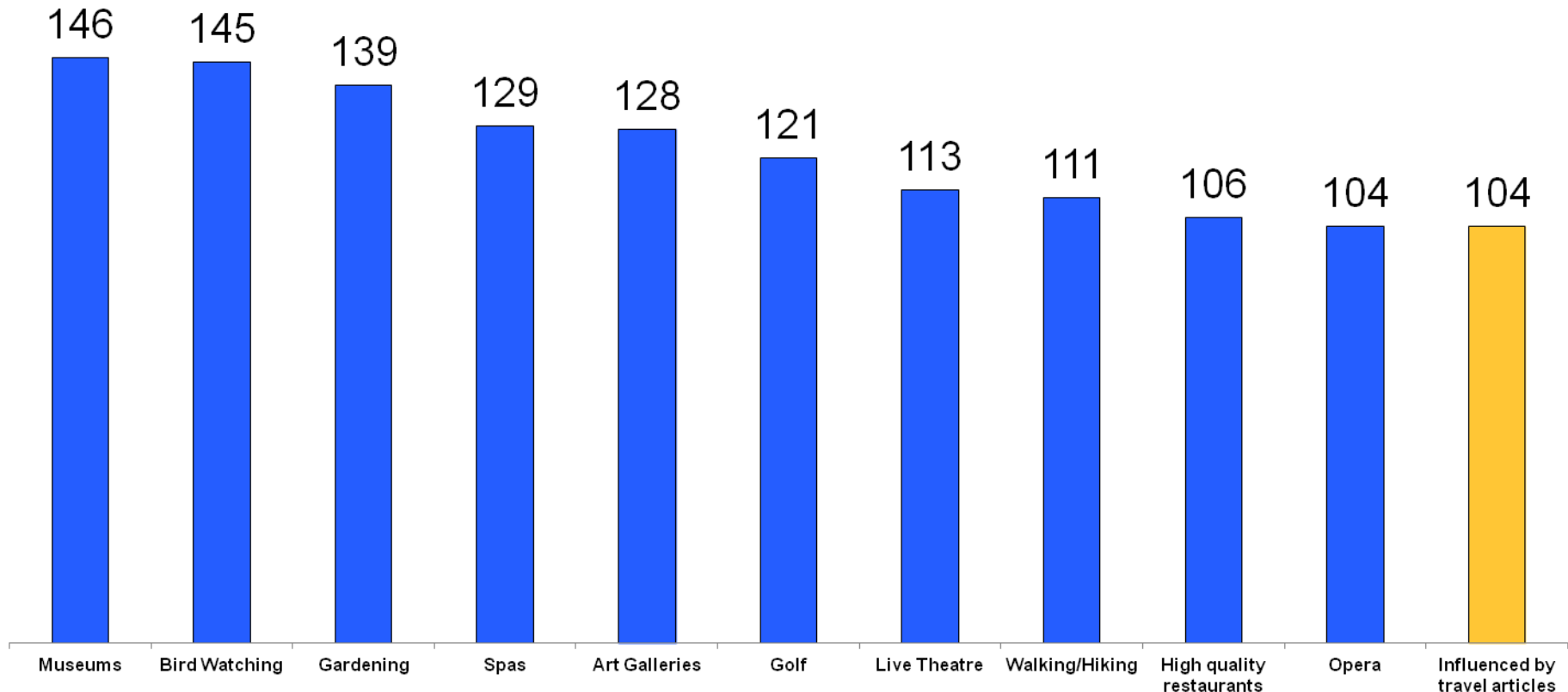
Average expenditure excluding airfares in 2011





# Canadian Boomers love History, Nature, Culture.

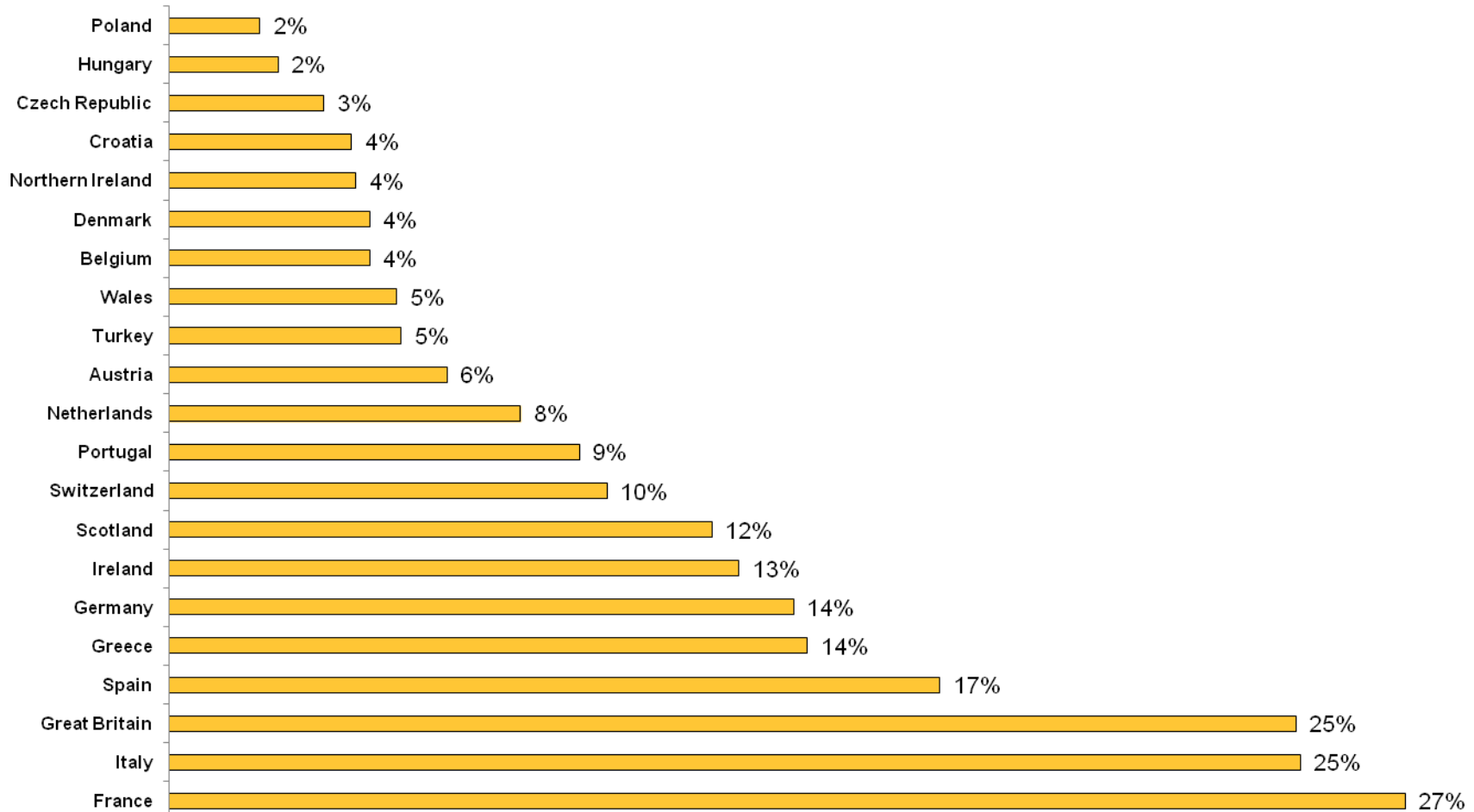
Index showing propensity by boomers to engage in activity 10+ times over last 12 months. Boomers are 46% more likely to have visited a museum 10+ times in past 12 months than other Canadians.





# Europe: Traditional destinations still popular

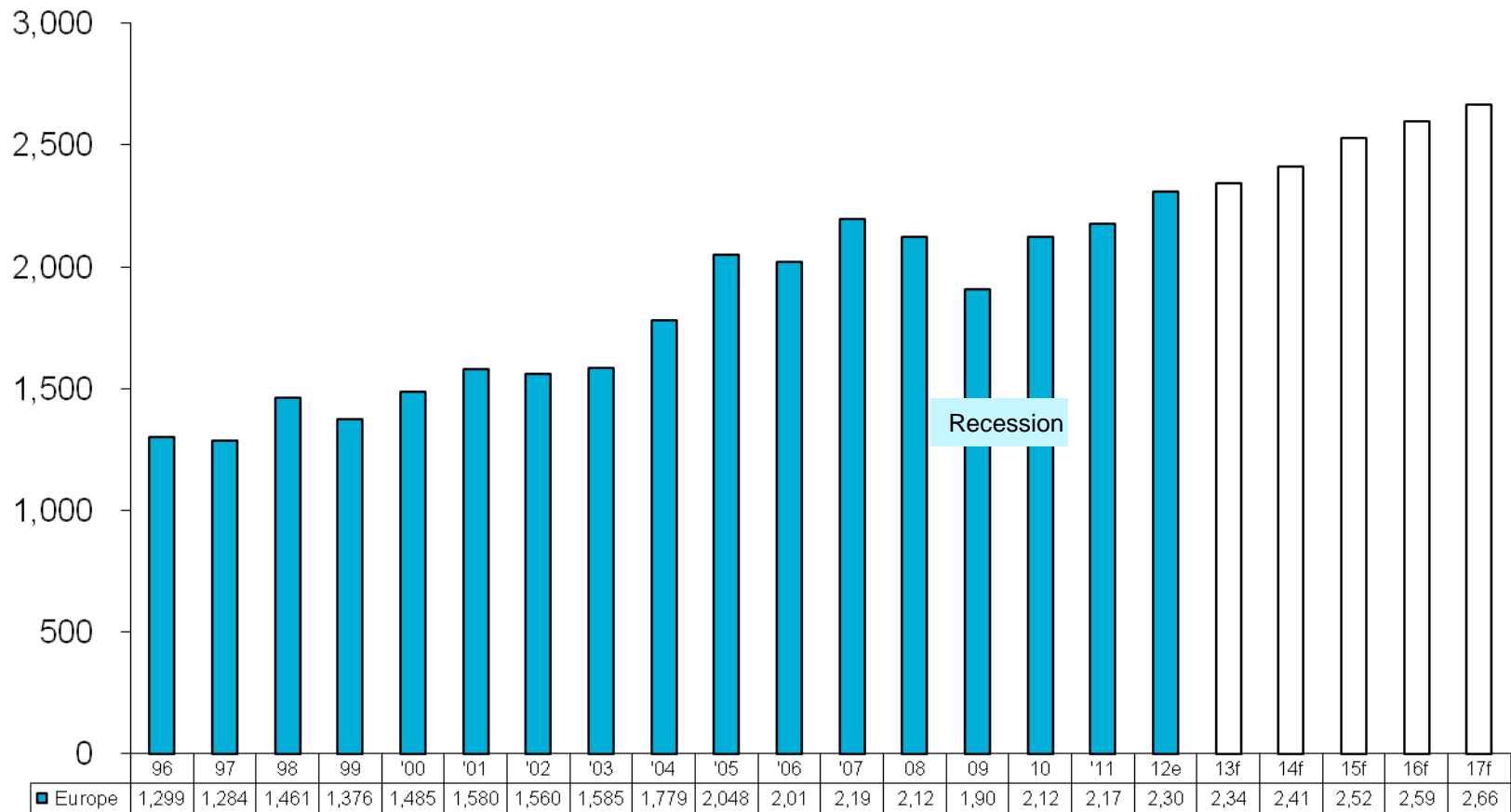
% of Canadian outbound leisure travellers indicating in April 2013 that they intend to vacation in country sometime during next three years.





# Canadian Leisure Trips to Europe

('000 of leisure trips)



Source: Historical Statistics Canada; Forecast CBoC.



# Europe has not kept pace with growth in Canadian outbound leisure travel

- 3.5% CAARG in leisure trips to Europe between 1996 and 2011
- 9.8% CAARG for non-Europe overseas leisure trips.
- Forecast 3.2% CAARG for 2013 - 2017 - competition from other countries, air capacity being trimmed, higher costs, civil unrest.

## Market focus:

- Less emphasis on volume of visits and more on \$ spent per visit
- Experiential based travel – boomers have been here before – looking for experiences
- Continue to work closely with Canada's trade – experienced, national in scope, put the product together and distribute it

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