

International Millennial Travel Fact Sheet

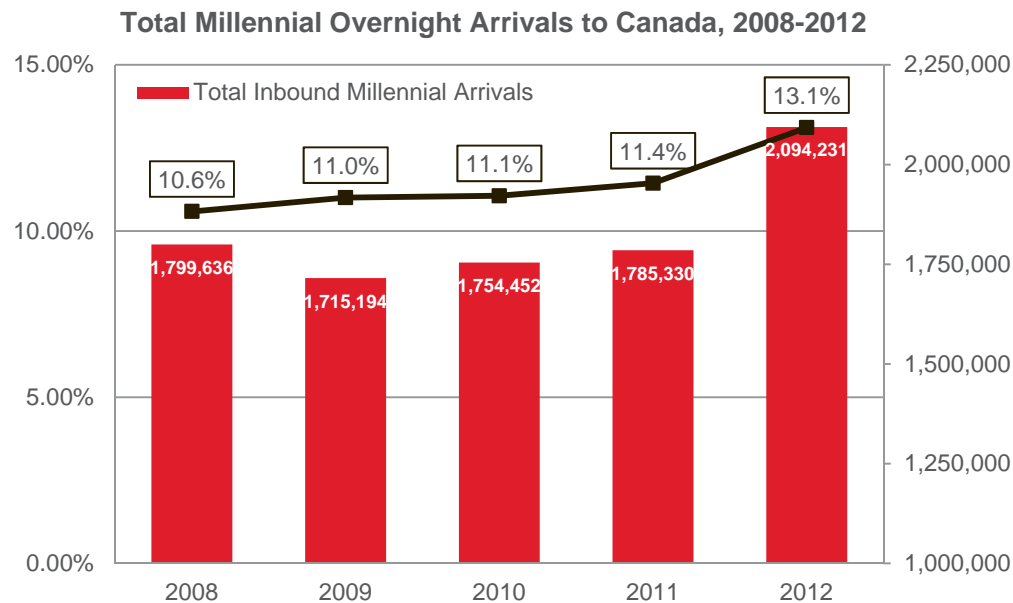
Purpose

This fact sheet provides information on the size, characteristics and travel trends pertaining to international millennial travellers to Canada.



1. Size and Origin of International Millennial Travel in Canada

Figure 1



Definition of the Millennial Traveller

“Millennial travellers” are non-resident visitors aged 18 to 34 who are travelling to Canada without their parents, children or other people outside their age group for one or more nights.

The number of millennial travellers to Canada grew from about 1.8 million in 2008 to nearly 2.1 million in 2012. Millennials accounted for about 13% of total international arrivals to Canada in 2012.

UNWTO estimates that millennials account for about 20% of global travellers. What's more, millennials are one of the fastest-growing travel segments globally. There is an opportunity for Canada to increase its share of the millennial travel market in years to come.

Source: ITS Characteristics, Statistics Canada and UNWTO

Figure 2

Millennial Overnight Arrivals to Canada, 2010-2012						
	2010		2011		2012	
	Number of Arrivals	% of Total	Number of Arrivals	% of Total	Number of Arrivals	% of Total
Overseas	840,731	47.9%	881,981	49.4%	912,736	43.6%
US	913,721	52.1%	903,349	50.6%	1,181,495	56.4%
Total Inbound Millennial Arrivals	1,754,452	100.0%	1,785,330	100.0%	2,094,231	100.0%

Approximately 56% of millennial travellers to Canada are from the US, with 44% from overseas.

The US is by far the largest source of millennial visitors to Canada, followed by Europe, Asia and Latin America/Caribbean.

Source: ITS Characteristics, Statistics Canada 2012

Figure 3

Overnight Millennial Visitors by Region of Origin in 2012

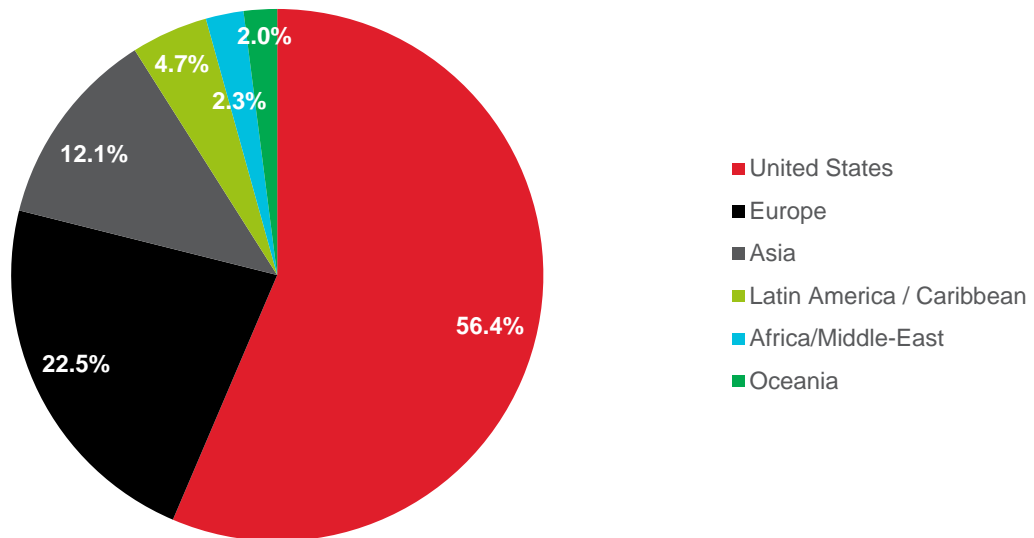
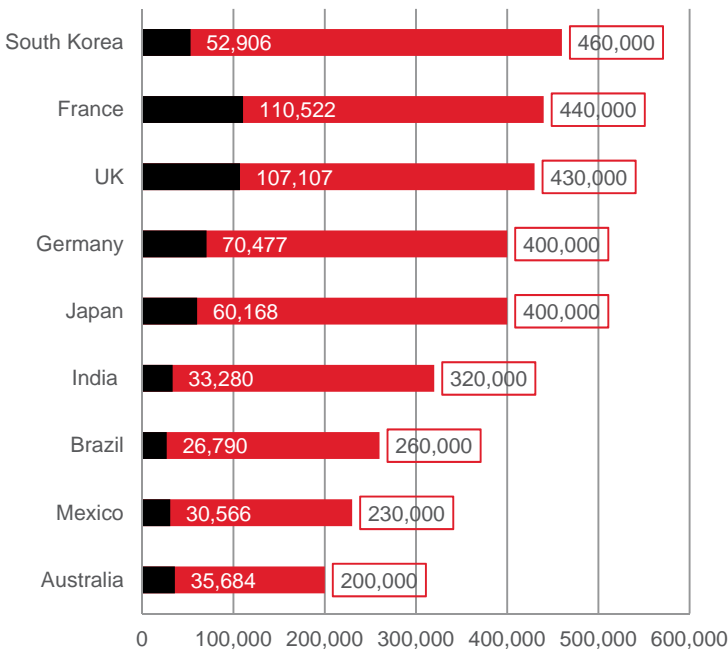


Figure 4, 5 & 6

Overseas Millennial Arrivals and Market Potential in 2012



Canada currently attracts only a portion of the total number of potential millennial travellers, so there is ample room for further growth in these markets.

Source: CTC Research Estimates based on Global Tourism Watch data, 2014

■ Arrivals to Canada
■ Potential Market

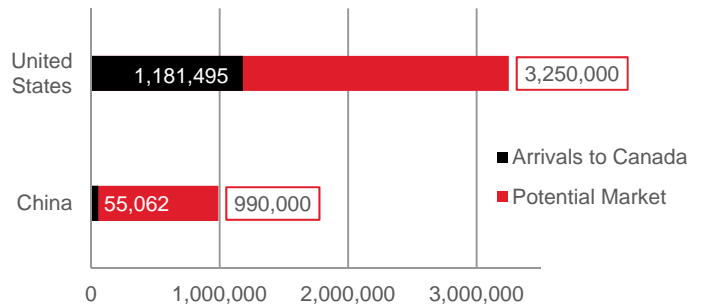
Definition of Market Potential

The number of millennial travellers who are actively considering visiting Canada in the next two years.

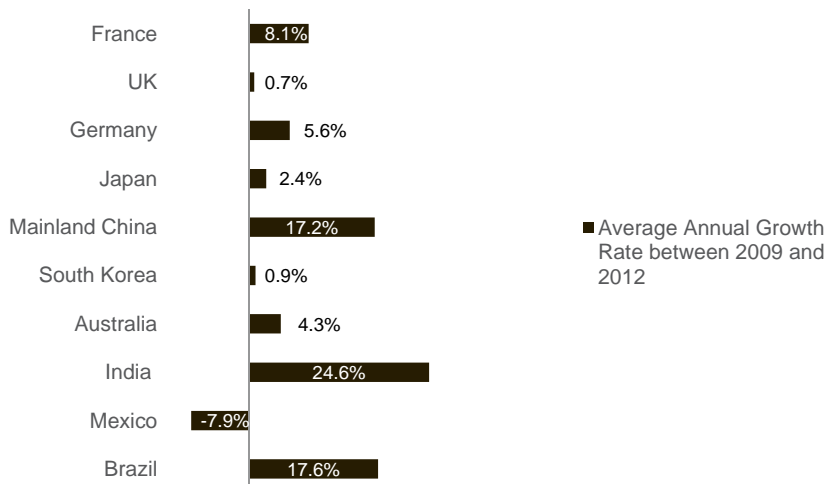
Millennial travellers from overseas come primarily from the 10 CTC overseas markets. About 85% of all millennial travellers to Canada are from the US and these 10 markets.

Source: ITS Characteristics, Statistics Canada 2012

US and China Millennial Arrivals and Market Potential in 2012



Visitation Growth from 2009 to 2012 (Top 10 Markets)



Of the 10 CTC overseas markets, India, Brazil and China recorded the strongest visitation growth between 2009 and 2012. Mexico is the only market that registered a decline since 2009. However, this decrease was due to the introduction of a tourist visa requirement for Mexican nationals by the Government of Canada in 2009.

Source: ITS Characteristics, Statistics Canada 2012

2. Trip Spend and Duration

Figure 7

Total Tourism Revenues in 2012						
	Millennials		Other Travellers (excl. Millennials)		All Travellers (incl. Millennials)	
	Total Spending (\$)	Share of Total (%)	Total Spending (\$)	Share of Total (%)	Total Spending (\$)	Share of Total (%)
US	684,080,302	30.4%	5,649,705,812	56.4%	6,333,786,114	51.6%
Overseas	1,569,033,029	69.6%	4,368,652,914	43.6%	5,937,685,943	48.4%
Total	2,253,113,331	100.0%	10,018,358,726	100.0%	12,271,472,057	100.0%
Share of Total Spending (%)	18.4%		81.6%		100.0%	

Youth travellers contribute 18.4% of total international tourism revenues in Canada, spending a total of \$2.25 billion in 2012.

Millennial travellers from overseas account for 70% of international millennial tourism revenues, while US millennials account for 30% of the total.

Source: ITS Characteristics, Statistics Canada 2012

Millennial travellers contribute 12.4% of total inbound expenditures attributable to pleasure travel in Canada, spending a total of \$733 million in 2012.

Millennial pleasure travellers spend an average of \$1,077 per trip in Canada, which is more than other travellers (\$740 per trip) because they tend to stay in Canada longer.

Millennial pleasure travellers from overseas spend more per trip than other overseas travellers. However, other US travellers spend more than US millennials, mainly because their average trip duration is longer.

Source: ITS Characteristics, Statistics Canada 2012

Figure 8

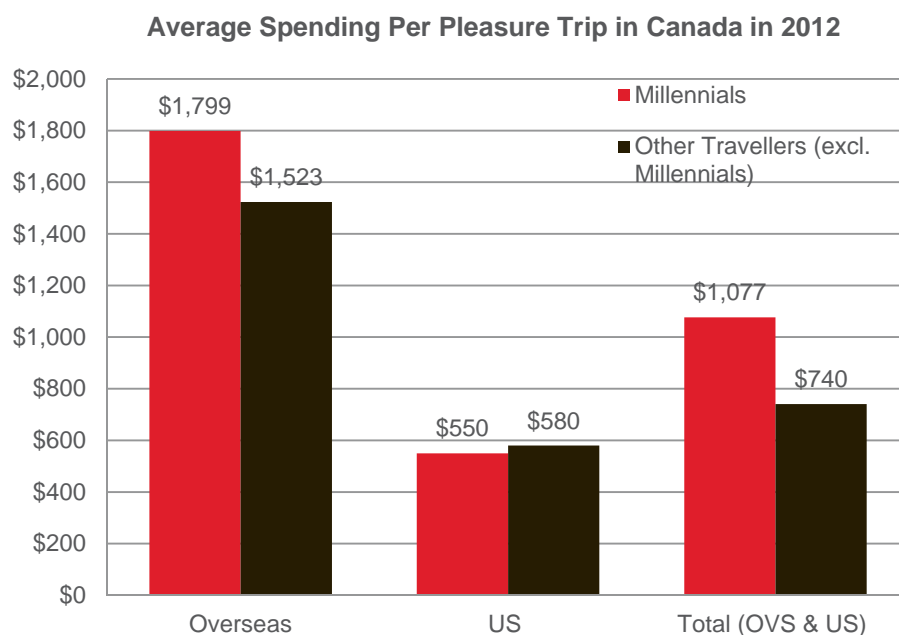
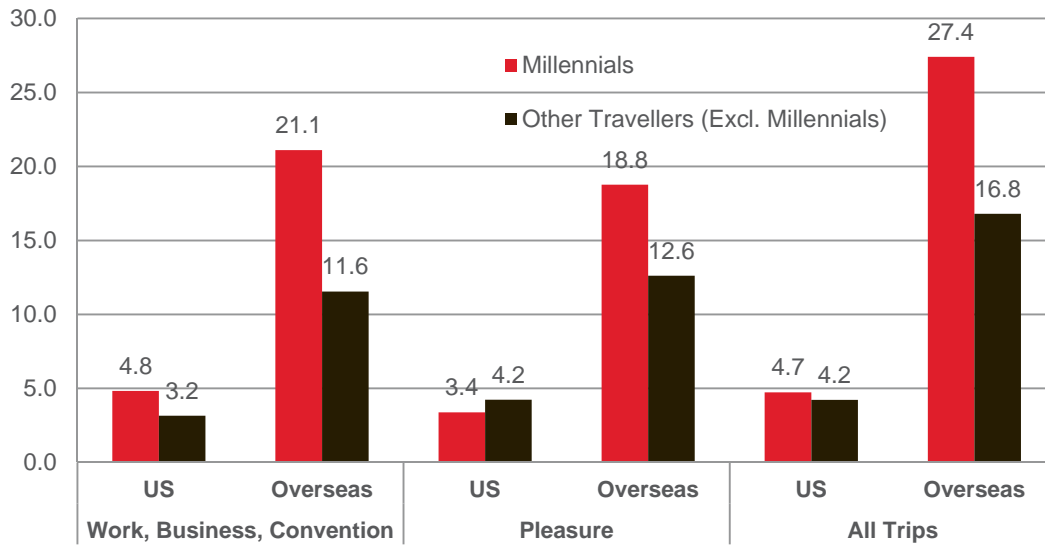


Figure 9

Average Trip Duration in Canada in 2012 (Number of Days)



The average trip duration of millennial travellers to Canada is longer than that of other travellers. Millennials spend an average of 4.7 days (US visitors) and 27.4 days (overseas visitors) in Canada, compared to 4.2 days (US visitors) and 16.8 days (overseas visitors) for all other travellers to Canada.

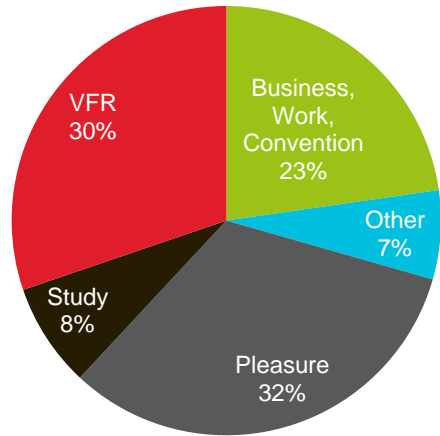
Millennials take longer business/work trips as well as pleasure trips, except for the US market, where other travellers stay longer on average than millennials.

Source: ITS Characteristics, Statistics Canada 2012

3. Purpose of Visit

Figure 10

Millennial Overnight Visits by Trip Purpose in 2012

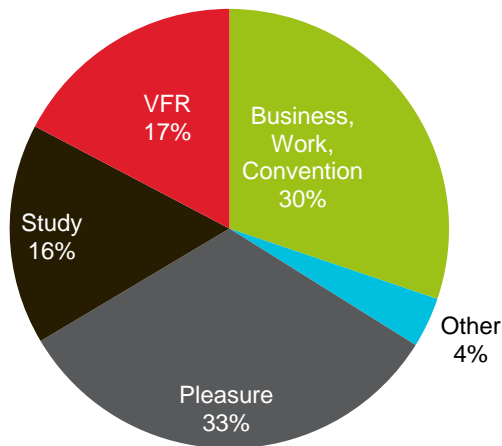


Pleasure and visiting family, friends and relatives (VFR) are the two main trip purposes to Canada for millennial travellers. Over the past decade or so, the share of pleasure trips has declined, while the share of study, work-related and VFR trips has edged up. More millennial travellers than ever come to Canada for other reasons than just pleasure.

Source: ITS Characteristics, Statistics Canada 2012

Figure 11

Millennial Travel Expenditures by Trip Purpose, 2012



In terms of spending, pleasure trips and trips for business/work/convention are the two main trip purposes, accounting for 33% and 30% of total spending by millennial travellers to Canada.

Source: ITS Characteristics, Statistics Canada 2012

For more information

For more information about international millennial travel to Canada, please contact the Research Team of the Canadian Tourism Commission at: research@ctc-cct.ca