

Attracting the International Visitor

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ADVENTURE TRAVEL
TRADE ASSOCIATION



Global Travel Trends & The Adventure Traveler



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TRAVEL 2015 - 2025

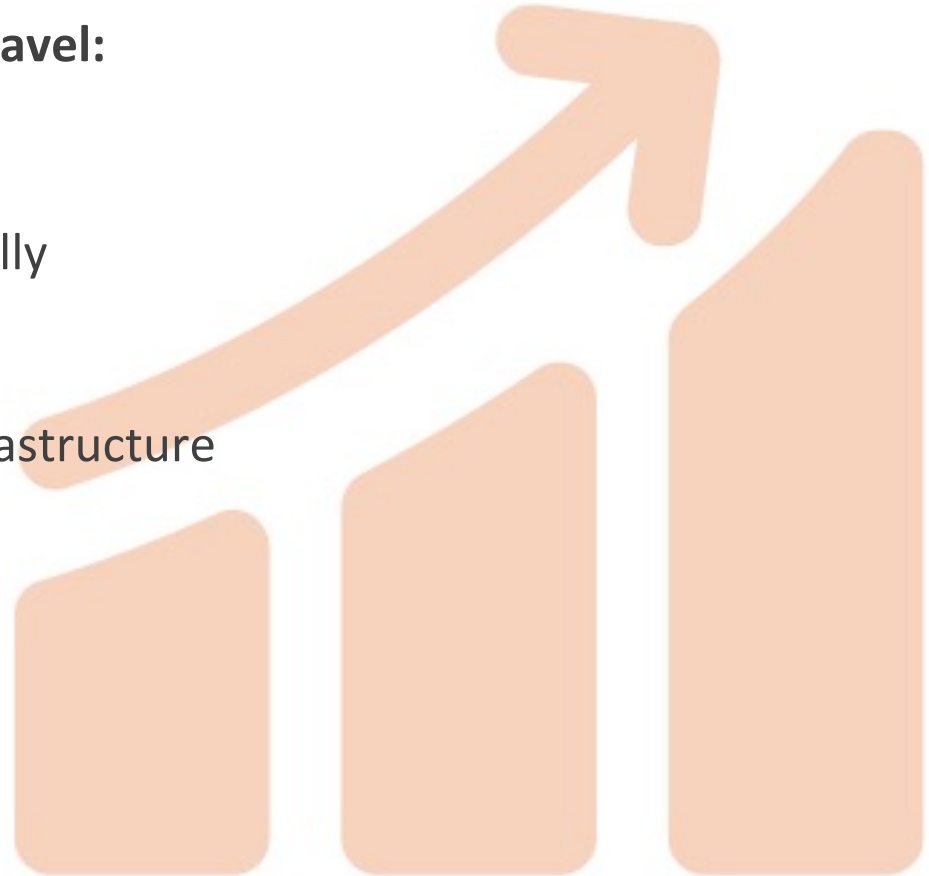
Factors Influencing Global Travel:

Expanding middle class globally

Internet connectivity

Improved transportation infrastructure

Aging global population



GENERAL TRAVELER TRENDS

60+ YEARS OLD

2010 – 2030

40% of international travelers

900 million - 1.4 billion (20% of the world's population)

Higher standards of quality

Larger budgets

18 – 30 YEARS OLD

2016

20% of international travelers

USD 250 billion in sales

Travel further

Stay longer

Interconnected

Spend more



What Is Adventure Travel?



We define adventure travel as having three attributes: interaction with the environment, physical activity and cultural exchange. When two of these are present it is adventure travel. At the core of adventure travel are trips that include all three elements.



Global Adventure Traveler Trends: Activities

ACTIVITY TRENDS



Trekking



Cycling



Food, beer, unique
gastronomy



Cultural experiences



Community interaction



Mountain biking excursions
in tours

THEMES



Conservation/wildlife/nature



Culinary tourism



Safety and security



Ecological awareness



The Adventure Traveler Profile

Average age: 36

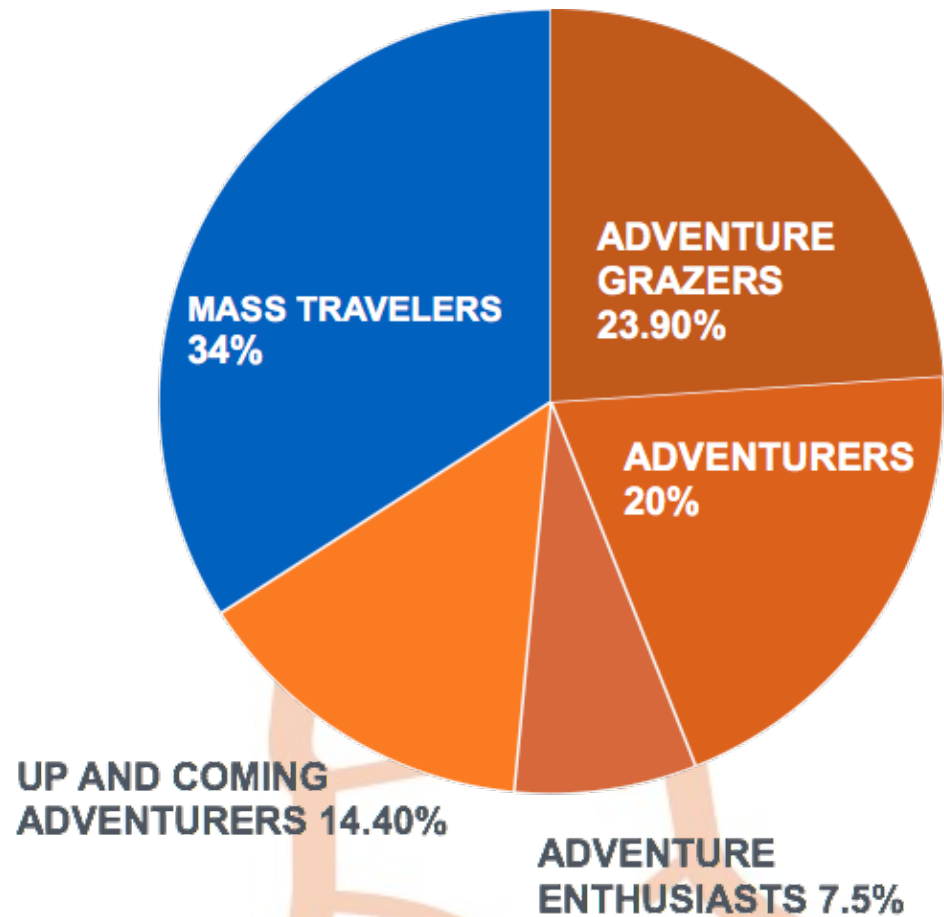
50% Female+

48% have a 4-year degree or higher

More likely than non-adventure travelers to use guides, tour operators or other specialized services



US-Traveler Segmentation





GRAZER

- Novice
- Sampling activities or bucket list driven
- Moderate risk



ADVENTURER

- Intermediate
- Repeat activities or building skills
- Moderate risk



ENTHUSIAST

- Experienced
- Seeks out the best places for favorite activities
- Highest risk, mitigated by their skill

Adventure Travel Personas

Who do your trips serve?



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Grazer

Dominant Motivation for
Adventure Travel



1) Timing



2) Best Location for Primary Activity



3) Seasonal Weather



Adventurer & Enthusiast

Dominant Motivation for
Adventure Travel



1) Seasonal Weather



2) Best Location for Primary Activity

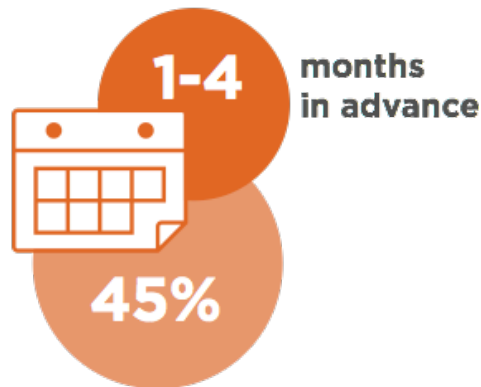


3) Timing

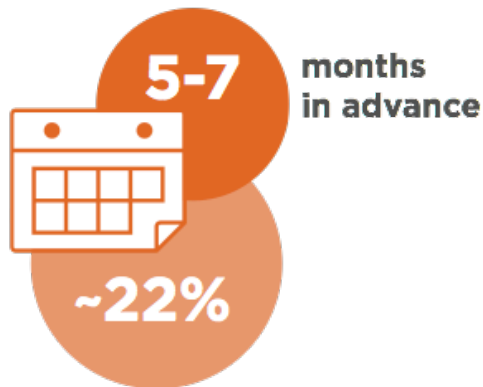
Planning Horizon

How far in advance did you begin planning the last trip you took?

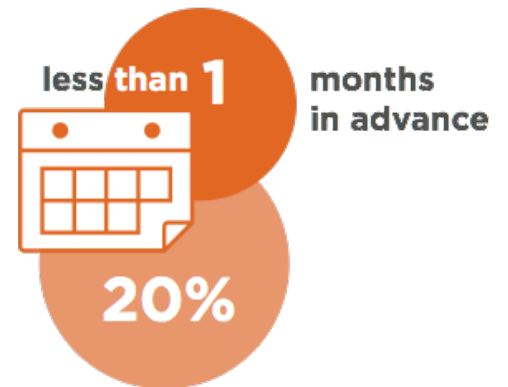
#1 Choice for all personas:



#2 Choice for all personas:



#3 Choice for all personas:



UNWTO Yearbook of Tourism Statistics Data 2010 – 2014, 2016 Edition

Tools Used to Prepare for Trip



Friends and Family



Review Site



Travel Magazine



Top Social Site



tripadvisor®

Top Review Site



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Canada & Travelers from Europe

Attracting the International Visitor

Whose job is this?

What is the Canada message and why is this important?

What is the role of an Aboriginal product?

What Is International?

- Well, it is not 'Canadian'
- "The rest of the world"
- Many different perceptions/expectations of Canada
- Not homogenous target market
- Western Europe is our original international market

Western Europe

Led by UK, Germany, France but also travellers from many smaller countries, each distinct

Degree of travel sophistication and experience differs widely

Different drivers: General tourism; activity focused; events

Marketing. Sales. Delivery.

How do Europeans shop and purchase a holiday?

What is unique about Canada?

How do Europeans travel once they are here?

Aboriginal Product

Where Does It Fit?

- ✓ **Itinerary building: multiple components and experiences**
- ✓ **Complementary and accessible**
- ✓ **Physical location**
- ✓ **Duration, frequency, seasonality**
- ✓ **Adds value and authenticity**



Connecting you with the
Asia Pacific Market

Connecting you with the Asia Pacific Market

December 2016



What is CITAP

Canadian Inbound Tourism – Asia Pacific

Not for profit organization established in 1997 by Receptive Tours Operators.

- **Vision:** to increase the business from the Asia Pacific market into Canada
- **Members:** over 300 members from various sectors in the tourism industry from across Canada and the United States.



ASIA PACIFIC



- The world's fastest-growing outbound travel markets.
- The emerging markets: China, India, Malaysia, Thailand, Indonesia, Philippines and Vietnam.
- The developed economies: Japan, South Korea, Taiwan, Hong Kong, Singapore, Australia and New Zealand.

HOW TO TAP INTO THIS MARKET?

Distribution channels to reach end consumer

SUPPLIERS →	RECEPTIVE →	OVERSEAS WHOLESALER/ INTERNATIONAL TOUR OPERATOR →	TRAVEL AGENT →	CONSUMERS
Hotels Attractions Transportations	CITAP members	In-market wholesaler	In market retail travel agencies	Visitors from China and other Asia Pacific markets



HOW TO TAP INTO THIS MARKET?

Pros and cons

- **Sell directly to end consumer:** bigger profit margin but expensive and high risk
- **Work with overseas travel agent, tour operator or wholesaler:** limited knowledge on the destination and the suppliers' products; not necessarily specialize in Canadian tourism suppliers' products
- **Work with receptive tour operator (RTO):** how to work with them as a supplier of our products.
 - **Expert:** specializing in Canadian tourism experiences and products
 - **Partner:** based in Canada and represents Canadian tourism suppliers' products to tour operators in international markets and looking for a long term partnership. They source, package, market, distribute and deliver the services of Canadian tourism products to provide a world class Canadian experience to international visitors
 - **Cost effective:** suppliers can have their products featured in thousands of brochures in countries all over the world at virtually no cost. This can eliminate the need for expensive sales missions to foreign countries and they reduce your financial risk

HOW YOUR BUSINESS CAN ENGAGE AND BE SUCCESSFUL

As a supplier...

- Your products/experiences are export ready
 - Safe and professional operation
 - Have the ability to accept payment from overseas clients
 - Have the commitment to stay in international markets for a minimum of 3 yrs.
 - Have language capability to service an international clients
 - Have the willingness to adapt to the needs of overseas clients

HOW CAN CITAP HELP YOU?

What is CITAP

Canadian Inbound Tour Operator for Asia Pacific

CITAP, non-profit organization established in 1997, is a united force with members from various market segments of the Hospitality Tourism Industry.

Growing from 10 pioneers to over 300 members in just a short period of time does mean something to us at CITAP – a genuine interest with sincere and devoted support in further developing Canada as the preferred destination for Asia Pacific travellers.

