



Tourism snapshot

A focus on the markets that the CTC and its partners are active in

January 2009

Volume 5, Issue 01

Key highlights

International travellers made 695,285 overnight trips to Canada in January 2009, a decline of 3.0% over the previous year. Notable, are the large increases from China (21.9%) and Germany (19.3%).

Despite the depressed economic environment, overnight trips from India and Brazil both increased by 24.5%.

Following thirteen consecutive monthly declines, U.S. auto trips to Canada were up by 1.2%.

Tourism review

International trips

- Primarily driven by continued declines from the U.S. and Japan, overnight trips by international travellers posted a 3.0% decline in January 2009 compared to the previous year;
- This month, trips to Canada from both the Americas and overseas key markets decreased compared to January 2008, falling 3.4% and 7.6%, respectively;
- Overnight trips from overseas countries other than CTC key markets increased by 6.2% reaching 86,916 trips, while CTC's key overseas markets registered a decrease of 7.6%.

United States

- Overnight trips from the U.S. fell 3.4% in January with trips by "other" modes experiencing the most significant drop of 22.6%, while plane trips fell by 6.7%. Automobile trips showed a slight increase of 1.2% over 2008 following thirteen consecutive declines;
- Despite the decrease in overall trips from the U.S., five provinces (Newfoundland, Québec, Manitoba, Saskatchewan and Alberta) registered increases, with Newfoundland registering the largest gain over last year of 218%.

Mexico

- In January 2009, overnight trips from Mexico dropped 3.6% over 2008, with a total of 13,052 trips made to Canada.

Overnight Trips To Canada

	January 2009	09/08 Jan % Change
Americas*		
United States		
Automobile	284,692	1.2
Plane	172,430	-6.7
Other	27,989	-22.6
U.S. Total	485,111	-3.4
Mexico	13,052	-3.6
Americas Total	498,163	-3.4
Overseas Key Markets		
France	18,400	-3.4
Germany	13,012	19.3
UK	33,587	-14.1
China	11,116	21.9
Japan	8,119	-25.6
South Korea	10,749	-20.6
Australia	15,223	-8.4
Overseas Key Markets Total	110,206	-7.6
As % of Overseas and Americas	18.1	
Other Overseas Countries	86,916	6.2
Non-US Countries	210,174	-2.1
Total Countries	695,285	-3.0

Note: Statistics Canada preliminary estimates.

Source: Statistics Canada, International Travel Survey.

*Refers to the CTC's marketing group in the U.S. and Mexico.

Overnight Trips by Canadians

	January 2008	January 2009	09/08 Jan % Change
United States	1,312,317	1,149,138	-12.4
Other Countries	934,710	1,001,328	7.1
Total Trips from Canada			

Note: Statistics Canada preliminary estimates.

Source: Statistics Canada, International Travel Survey.

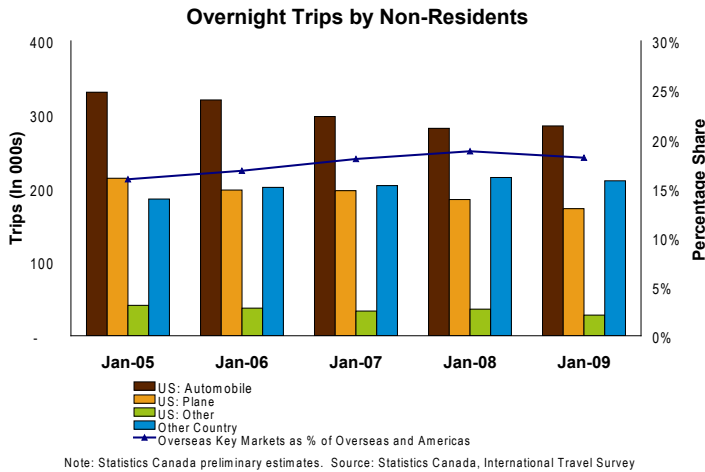
Overseas key markets

- In January 2009, collectively, the overseas key markets posted a decrease, falling by 7.6% over the same month in 2008, for a total of 110,260 overnight trips made to Canada;
- For the month of January, significant increases in visitation were recorded from China and Germany of 21.9% and 19.3%, respectively, which were more than offset by decreases from Japan (25.6%), South Korea (20.6%) and the U.K. of (14.1%);
- Declines registered from Australia and France of 8.4% and 3.4%, also contributed to the negative performance of overseas key markets in January 2009.

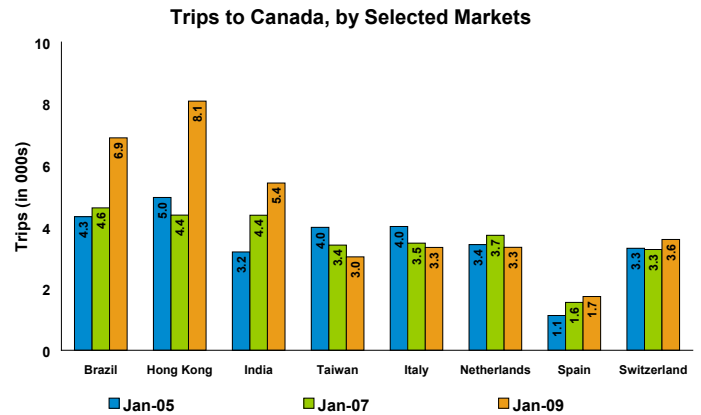
- Visitors from Asian key markets made just over 45,000 trips in January, accounting for 7.4% of total visitors from key markets;
- Overseas key markets have lost a small share to the U.S. in January, falling from 18.8% in 2008 to 18.1%.

Market watch

- Canada experienced an 84% increase in trips from Hong Kong in January 2009 over the same month in 2007, with Brazil capturing the 2nd highest growth of 49%;
- Trips from Taiwan, the Netherlands and Italy declined relative to January 2007 levels, experiencing an 11%, 10% and 4% drop and a 24%, 2% and 17% decrease over January 2005, respectively;
- Trips from both Spain and Switzerland saw more moderate growth compared to January 2007 of 12% and 10%, while Canada saw a more significant increase from India of 24% over 2007 and 70% over 2005.



Note: Statistics Canada preliminary estimates. Source: Statistics Canada, International Travel Survey



Note: Statistics Canada preliminary estimates. Source: Statistics Canada, International Travel Survey.

Share of entry

- Canada received 485,111 overnight U.S. visitors in January, which accounted for 79.7% of total visitors from core markets. Of these U.S. visitors, 46.8% travelled by automobile, 28.3% by plane, while 4.6% used "other" modes of transportation;
- Americas (the U.S. and Mexico) accounted for 81.9% of total visitors from core markets with Mexico having a share of 2.1%;
- In January, overnight visitors from key European markets made 65,000 trips to Canada, accounting for 10.7% of total core market trips. Of all core market trips, the U.K. accounted for the largest portion at 5.5%, followed by France at 3.0% and Germany at 2.1%;

Accommodations

- Please note that accommodation figures will be available in the February 2009 Tourism Snapshot and subsequent issues.

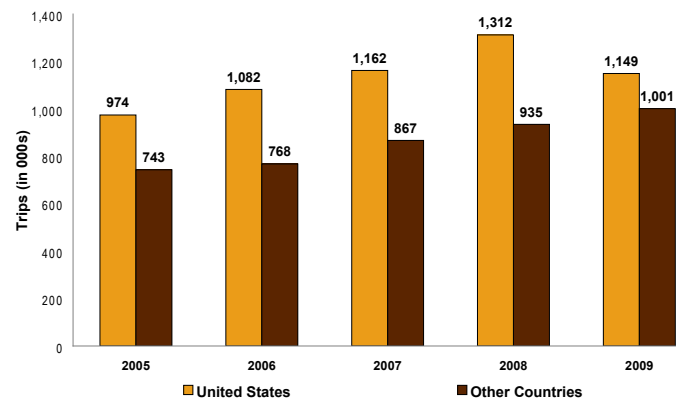
Strategic performance

- Please note that the strategic performance figures will be posted in the Q1 2009 Tourism Snapshot and subsequent issues.

Canadian outbound trips

- In January 2009, overall outbound trips by Canadians posted a decrease of 4% over the same period last year;
- Trips to the U.S. were down 12% in January, while an increase of 7% recorded to non-U.S. outbound destinations in January compared to the same month last year;
- Overall, there were a total of ten provinces/territories that experienced decreases compared to January 2008, with the Yukon recording the most significant decrease of 43%, and the only gains recorded from Newfoundland up 117% and Saskatchewan up 3% over last year;
- To non-U.S. countries, all reported provinces showed positive trip growth, with overall trips from Canada up 7.1% over last January;
- In total, outbound travel from Newfoundland saw the most significant increase of 102% compared with the same month last year, while Prince Edward Island experienced the most notable decline of 33%.

Outbound Trips by Canadians (in 000s)



Note: Statistics Canada preliminary estimates. Source: Statistics Canada, International Travel Survey

Consumer outlook

Consumer confidence

CANADA: Consumer confidence held steady in January 2009 after the index fell for the 3rd consecutive month in December to 67.7 (2002=100).

UNITED STATES: The Conference Board reported that Consumer confidence moderately decreased in January 2009 to 37.4 compared to last month when the index stood at 38 (1985=100). This marks a new all time low for the index.

Sources: Consumer Confidence Index, the Conference Board (USA); and Index of Consumer Confidence, the Conference Board of Canada.

Competitive review (November 2008)

- International trips to the U.S. totalled 46.6 million for the January through November 2008 period, a 6.9% increase over the year prior, while Australia experienced a 1% decrease in visitation, with just under 5 million travellers;
- Canada faced the most significant decrease in visitation over the previous year, experiencing a 4.8% drop, receiving a total of 16 million travellers in the January to November 2008 period;
- Of the three destinations, the U.S. outperformed both Canada and Australia in terms of market growth with France up by 26.2%, Germany by 18.2%, China by 17.8%, and the U.K. up 3%. The U.S. also experienced less severe decreases with Japan down by 7.6% and South Korea down by 4.7% compared to Canadian and Australian markets;
- Canada experienced stronger growth in trips from Mexico, with trip growth of 9.4%, while the U.S. experienced a 6.8% decrease. Trips from Australia to Canada grew 10.4% compared the year prior, while the U.S. was up 4.1%.

International Travel, January-November 2008 (In 000s)

Trips From:	Trips To:					
	Canada		United States		Australia	
	#	08/07 Change	#	08/07 Change	#	08/07 Change
Total International	16,047	-4.8%	46,592	6.9%	4,971	-1.0%
Americas						
United States	11,700	-7.1%	...	...	409	-1.0%
Mexico ¹	248	9.4%	5,508	-6.8%	...	...
Other Key Markets						
France	396	13.4%	1,149	26.2%	76	16.0%
Germany	305	4.1%	1,656	18.2%	142	5.0%
United Kingdom	801	-5.5%	4,209	3.0%	571	-3.0%
China ²	149	5.2%	590	17.8%	325	-1.0%
Japan	263	-16.7%	2,999	-7.6%	420	-20.0%
South Korea	174	-6.4%	708	-4.7%	202	-13.0%
Australia	219	10.4%	625	4.1%	...	...
Canada	...	...	17,847	7.9%	110	10.0%
Total Key Markets	14,254	-6.2%	35,291	4.0%	2,040	-5.3%

...Not available or data not applicable.

¹US figures for Mexico include arrivals to interior only.

²US figures for China includes Hong Kong, SAR.

Sources: Statistics Canada; Tourism Australia; and ITA, Office of Travel and Tourism Industries (USA).

Note: Statistics Canada preliminary figures.

**CTC Marketing
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