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%.

To supplement the data provided, a table is included that summarizes the overnight trips to Canada for January 2009 and the percentage change compared to January 2008. The table categorizes trips by region (Americas and Overseas Key Markets), country, and transportation mode. The data highlights significant increases and decreases across various markets.

In summary, international travel to Canada experienced a decrease of 3.0% in January 2009 compared to the previous year, primarily driven by continued declines from the U.S. and Japan, while trips from Mexico fell 3.6%. Despite these declines, there were notable increases from China and Germany.

Note: Statistics Canada preliminary estimates.
Source: Statistics Canada, International Travel Survey.
*Refers to the CTC’s marketing group in the U.S. and Mexico.
Tourism snapshot

Overnight Trips by Canadians

<table>
<thead>
<tr>
<th></th>
<th>January 2008</th>
<th>January 2009</th>
<th>09/08 Jan % Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>United States</td>
<td>1,312,317</td>
<td>1,149,138</td>
<td>-12.4</td>
</tr>
<tr>
<td>Other Countries</td>
<td>934,710</td>
<td>1,001,328</td>
<td>7.1</td>
</tr>
</tbody>
</table>

Total Trips from Canada


Overnight 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 declines 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.

Overnight Trips by Non-Residents

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%;
- 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%.

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%.

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

<table>
<thead>
<tr>
<th>Trips From:</th>
<th># 08/07</th>
<th>08/07 Change</th>
<th># 08/07</th>
<th>08/07 Change</th>
<th># 08/07</th>
<th>08/07 Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total International</td>
<td>16,047</td>
<td>-4.8%</td>
<td>46,592</td>
<td>6.9%</td>
<td>4,971</td>
<td>-1.0%</td>
</tr>
<tr>
<td>Americas</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>United States</td>
<td>11,700</td>
<td>-7.1%</td>
<td>...</td>
<td>...</td>
<td>409</td>
<td>-1.0%</td>
</tr>
<tr>
<td>Mexico1</td>
<td>248</td>
<td>9.4%</td>
<td>5,508</td>
<td>-6.8%</td>
<td>...</td>
<td>...</td>
</tr>
<tr>
<td>Other Key Markets</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>France</td>
<td>396</td>
<td>13.4%</td>
<td>1,149</td>
<td>26.2%</td>
<td>76</td>
<td>16.0%</td>
</tr>
<tr>
<td>Germany</td>
<td>305</td>
<td>4.1%</td>
<td>1,666</td>
<td>18.2%</td>
<td>142</td>
<td>5.0%</td>
</tr>
<tr>
<td>United Kingdom</td>
<td>801</td>
<td>-5.5%</td>
<td>4,209</td>
<td>3.0%</td>
<td>571</td>
<td>-3.0%</td>
</tr>
<tr>
<td>China2</td>
<td>149</td>
<td>5.2%</td>
<td>590</td>
<td>17.8%</td>
<td>325</td>
<td>-1.0%</td>
</tr>
<tr>
<td>Japan</td>
<td>263</td>
<td>-16.7%</td>
<td>2,999</td>
<td>-7.6%</td>
<td>420</td>
<td>-20.0%</td>
</tr>
<tr>
<td>South Korea</td>
<td>174</td>
<td>-6.4%</td>
<td>708</td>
<td>-4.7%</td>
<td>202</td>
<td>-13.0%</td>
</tr>
<tr>
<td>Australia</td>
<td>219</td>
<td>10.4%</td>
<td>625</td>
<td>4.1%</td>
<td>...</td>
<td>...</td>
</tr>
<tr>
<td>Canada</td>
<td>...</td>
<td>...</td>
<td>17,847</td>
<td>7.9%</td>
<td>110</td>
<td>10.0%</td>
</tr>
<tr>
<td>Total Key Markets</td>
<td>14,254</td>
<td>-6.2%</td>
<td>35,291</td>
<td>4.0%</td>
<td>2,040</td>
<td>-5.3%</td>
</tr>
</tbody>
</table>

1US figures for Mexico include arrivals to interior only.
2US figures for China include Hong Kong, SAR.

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

Note: Statistics Canada preliminary figures.

Canadian Tourism Commission

Tourism snapshot

January 2009

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%.

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.

Consumer outlook

C T C M a r k e t i n g

M a r k e t R e s e a r c h

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.