



# Tourism Snapshot

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

# Key highlights

**Spurred by the events surrounding the 2010 Olympic Winter Games**, international travel to Canada registered a gain of 2.6% in February 2010. British Columbia soared by 29.7%, but Ontario declined by 10.9%.

**International travellers** made 756 thousand overnight trips to Canada in February 2010, with the US (+1.1%) and overseas markets (+6.5%) registering increases.

**Mexican travel to Canada continued to deteriorate**, registering a 10th consecutive monthly decline (-52.3%). The UK (-8.6%) and India (-5.4%) were the only other CTC target markets to experienced declines in February 2010.



# Tourism review In bound highlights

## Overnight trips to Canada

	February 2010	10/09 Feb. % Change	Jan.-Feb. 2010	Year-to-date % Change
<b>Americas*</b>				
<b>United States</b>				
Automobile	311,011	-3.5	562,521	-7.3
Plane	189,556	5.5	356,995	1.3
Other	37,198	23.8	65,244	12.1
<b>US Total</b>	<b>537,765</b>	<b>1.1</b>	<b>984,760</b>	<b>-3.2</b>
Mexico	5,168	-52.3	11,381	-52.3
<b>Americas Total</b>	<b>542,933</b>	<b>0.0</b>	<b>996,141</b>	<b>-4.3</b>
<b>Overseas Key Markets</b>				
France	27,109	7.6	48,004	10.1
Germany	13,859	9.6	25,840	0.7
UK	34,807	-8.6	66,876	-6.7
China	10,239	9.7	19,925	-2.6
Japan	12,829	12.0	21,485	9.8
South Korea	8,130	7.0	18,164	-1.0
Australia	9,645	2.5	22,641	-8.1
India**	4,758	-5.4	11,146	6.6
Brazil**	3,582	4.2	10,223	-1.1
<b>Overseas Key Markets</b>	<b>124,958</b>	<b>2.3</b>	<b>244,304</b>	<b>-0.2</b>
<b>As % of Overseas and Americas</b>	<b>18.7%</b>		<b>19.7%</b>	
Other Overseas Countries	88,089	22.7	158,486	8.3
Non-US Countries	218,215	6.5	414,171	-0.2
<b>Total Countries</b>	<b>755,980</b>	<b>2.6</b>	<b>1,398,931</b>	<b>-2.3</b>

Note: Statistics Canada preliminary estimates.

Source: Statistics Canada, *International Travel Survey*.

\*Refers to the CTC's marketing group in the US and Mexico.

\*\*India and Brazil are added to the CTC overseas key markets.

## International trips

- There were 755,980 overnight visitor arrivals to Canada during February, a 2.6% increase relative with February 2009;
- February trips from the Americas (the US and Mexico market) remained unchanged compared with the same month in 2009 despite a strong decline in Mexican visitors;
- Overseas key CTC markets experienced a 2.3% increase in overnight travellers to Canada, compared with the same time last year. Year-to-date February, overseas key markets saw a moderate 0.2% decline, over 2009;
- Total trips from CTC Asian markets (China, Japan, South Korea, and Australia) increased by 8.1%, while there were declines in Emerging (India and Brazil) and European (France, Germany and the UK) markets of 1.5% and 0.2% respectively over February 2009;
- Overseas countries other than CTC key markets generated the strongest growth in overnight visitors with a 22.7% increase over 2009. Year-to-date, these markets have experienced an 8.3% growth;
- British Columbia saw a 29.7% jump in the total number of overnight visitors, reaching 268,623. Saskatchewan and Yukon also had gains of 19.9% and 17.6% respectively over 2009.

## United States

- There were 537,765 overnight trips from the US during February, a 1.1% increase compared with the same period last year, and a 20.3% gain compared with the previous month;
- Both US “other” modes of transport and plane trips recorded growth of 23.8% and 5.5% respectively over February 2009, while the number of auto trips fell by 3.5%;
- Largely due to the 2010 Winter Olympic Games, British Columbia recorded a 27.6% gain in overnight auto trips and a 53.5% gain in non-automobile trips from the US in February. Overall, British Columbia welcomed 186,838 US visitors in the month of February, a 36.9% jump compared with the same month last year;
- Besides British Columbia, Saskatchewan (+20.5%) and Yukon (9.4%) were the only other provinces to post increases compared with February 2009.

## Mexico

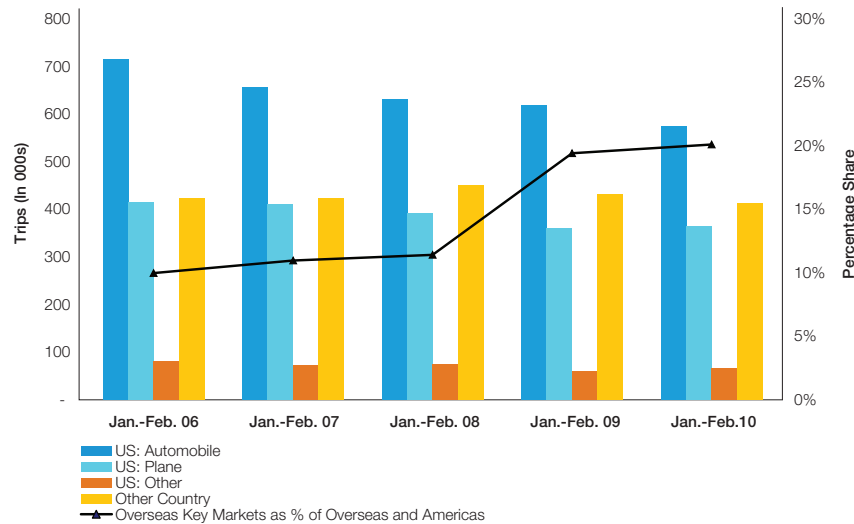
- Mexican travel to Canada continued to deteriorate with Mexico registering a 10<sup>th</sup> consecutive monthly decline (-52.3%) compared with February 2009.

## Overseas key markets

- In February 2010, seven of the nine CTC key markets posted increases in the number of overnight visits to Canada. Japan (+12.0%), Germany (+9.6%), China (+9.7%), France (+7.6%), South Korea (+7.0), Brazil (+4.2%) and Australia (+2.5%) while the UK (-8.6%) and India (-5.4%) posted declines;
- Year-to-date, France, Japan and India posted the strongest gains with increases of 10.1%, 9.8% and 6.6% respectively, while Australia posted the largest year to date decline of 8.1%;
- This month, BC registered the largest number of visitors from countries other than the US, with the total number of overnight visitors reaching 81,785 (up 15.8% over February 2009), followed by Ontario who welcomed 68,283 overnight visitors (up 4.4% over February 2009);
- Year-to-date, New Brunswick posted the strongest growth rate of overnight visitors from countries other than the US (up 42.1% compared to the same period last year), followed by Newfoundland and Labrador and Saskatchewan who saw gains of 25.5% and 14.4% respectively.

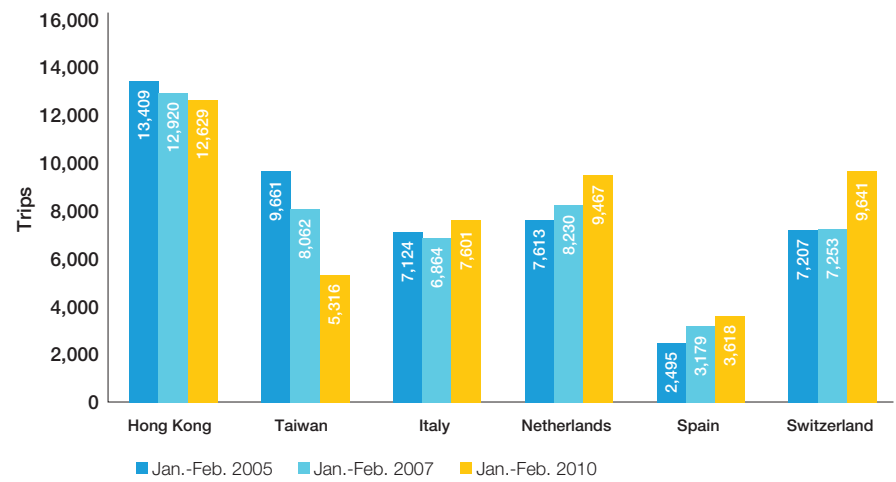
# Share of entry (February, 2010)

## Overnight trips by non-residents



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

## Trips to Canada, by selected markets



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

- Canada received 537,765 overnight US visitors in February, representing 79.4% of international travellers from key markets. Of those US travellers, 45.3% came by automobile, 28.8% came by plane and 5.3% came by “other” non-automobile transpiration;
- In February, overnight visitors from key European markets made 104,720 trips to Canada accounting for 11.3% of total trips from key markets, a gain of 1.7 points in share of entry over February 2005. Of all key market trips, the UK accounted for the largest portion at 5.4%, followed by France at 3.9% and Germany at 2.1%;

- Visitors from Asian key markets made 82,215 trips in February, accounting for a 6.6% share of total trips from key markets, a 1.4 increase over February 2005. Of all key market trips, Australia accounted for 1.8% while Japan represented 1.7%;
- Emerging Markets (India and Brazil) made 6,131 trips to Canada in February, representing 1.7% of total trips from key markets, a 1.0 point increase compared with the same month in 2005.

## Market Watch

- Year-to-date February 2010, Canada received the largest volume of travellers from Switzerland (9,641 overnight trips, a 33.8% increase compared with 2005), while Spain posted the highest growth rate over 2005 (+45.0%);
- Compared with January to February 2005, the Netherlands posted a 24.4% gain in visitor numbers to Canada while Italy posted a more moderate increase of 6.7%;
- Both Taiwan and Hong Kong fell below January to February 2005 levels, with declines of 52.4% and 5.8% respectively.

# Competitive review (January-December 2009)

## International travel, January-December 2009 (in 000s)

Trips From:	Trips To:					
	Canada		United States		Australia	
	#	09/08 Change	#	09/08 Change	#	09/08 Change
<b>Total International</b>	14,110	-8%	47,738	-7%	5,585	0%
<b>Americas</b>						
United States	11,735	-6%	...	...	480	6%
Mexico <sup>1</sup>	169	-37%	13,164	-4%	...	...
<b>Overseas Key Markets</b>						
France	408	-3%	1,204	-3%	93	9%
Germany	310	-3%	1,687	-5%	161	0%
United Kingdom	711	-17%	3,899	-15%	664	-1%
China <sup>2</sup>	161	1%	641	1%	366	3%
Japan	198	-28%	2,918	-10%	355	-22%
South Korea	138	-25%	744	-2%	181	-17%
Australia	204	-14%	724	5%	...	...
India	108	-3%	549	-8%	125	8%
Brazil	62	-14%	893	16%	...	...
Canada	...	...	17,958	-5%	123	-1%
<b>Total Key Markets</b>	<b>14,202</b>	<b>-8%</b>	<b>26,423</b>	<b>-6%</b>	<b>2,426</b>	<b>-4%</b>

- From January to December 2009, international travel to Australia remained unchanged, while Canada and the US posted declines of 8%, 7% respectively over 2008;
- While Canada experienced a 6% decline in travellers from the US, Australia enjoyed a 6% increase;
- Both Canada and the US saw a 1% increase in travellers from China during 2009, while Australia posted a 3% gain compared with the same period in 2008;
- The US experienced stronger growth from Brazil (+16%) and Australia (+5%), while Canada had declines of 14% for both markets over 2008;
- Australia registered the highest increases from India (+8%) and France (+9%).

...Not applicable or data not available.

<sup>1</sup> US figures for Mexico include arrivals to interior only.

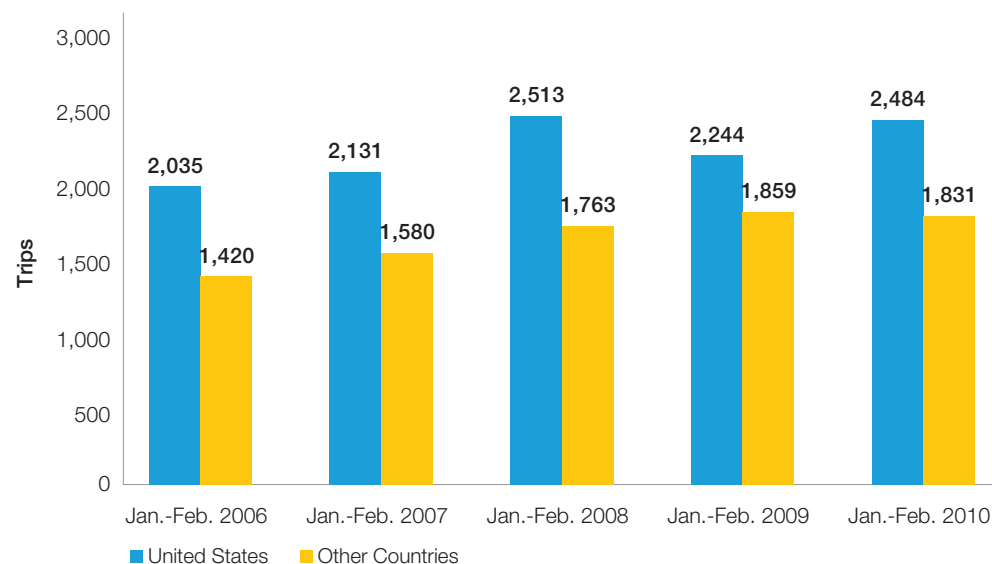
<sup>2</sup> US figures for China includes Hong Kong, SAR.

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

Note: Statistics Canada preliminary figures.

# Canadian outbound trips

## Overnight trips by Canadians



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

- With an economic recovery underway and a strengthening Canadian dollar, Canadian overnight travel to the US edged up by 7.9% in February. Year-to-date Canadian travel to the US has increased 10.7% over 2009;
- Year-to-date, the majority of provinces posted improvements in the number of trips to the US, with Saskatchewan posting the largest increase (up 28.5%), followed by Manitoba and British Columbia with gains of 19.7% and 17.9% respectively;
- In February, Canadian travel to countries other than the US declined by 2.4%, contributing to a year-to-date decline of 1.5%;
- Year-to-date, PEI posted the largest decline in travel to countries other than the US (down 100.0%), following by Newfoundland and Labrador (down 79.2%) and Nova Scotia (down 22.6%).

## Overnight trips by Canadians

	Feb. 2010	10/09 Feb. % Change	Jan.-Feb. 2010	Year-to-date % Change
United States	1,182,417	7.9	2,484,092	10.7
Other Countries	835,396	-2.4	1,830,591	-1.5
<b>Total Trips from Canada</b>	<b>2,017,813</b>	<b>3.4</b>	<b>4,314,683</b>	<b>5.2</b>

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

# Consumer outlook

## Consumer confidence

- **Canada:** The index of Consumer Confidence fell 8.3 points in February—a significant drop, but still 34.1 points above a year-ago. The Index of Consumer Confidence now stands at 88.3 (2002 = 100).
- **USA:** The Conference Board Consumer Confidence Index®, which had increased in January, but dripped back sharply in February. The index now stands at 46.0 (1985 = 100), down from 56.5 in January, but up from 25.0 in February 2009.

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

# Accommodations

## Canadian occupancy rates, by province\*

	Feb. 2010	10/09 Change <sup>^</sup>	Jan.-Feb. 2010	Year-to-date Change <sup>^</sup>
Alberta <sup>1</sup>	54.2	-7.7	50.7	-6.8
British Columbia	67.6	10.6	56.4	5.0
Saskatchewan	67.6	-0.5	63.2	-2.1
Manitoba	62.8	1.8	57.0	0.9
Ontario	52.1	0.2	48.3	-0.7
Quebec	53.9	-1.7	49.3	-0.9
New Brunswick	48.9	0.8	43.1	0.4
Nova Scotia	48.0	-1.7	43.0	-1.1
Newfoundland	55.0	1.1	51.0	2.2
Prince Edward Island	45.0	5.7	35.7	2.2
Northwest Territories	64.7	-2.5	57.4	-0.9
Yukon	73.2	5.7	60.8	3.6
<b>Canada</b>	<b>56.2</b>	<b>0.8</b>	<b>50.6</b>	<b>-0.5</b>

\* Note: Based on the operating results of 209,488 rooms (unweighted data).  
<sup>^</sup> Percentage points.  
<sup>1</sup> Excluding Alberta resorts.  
 Source: PKF Consulting Inc.

- In February 2010, the national occupancy rate reached 56.2%, an increase of 0.8% from February 2009. In BC alone, there was a notable 10.6% gain in occupancy rates, with Greater Vancouver and Whistler posting increases of 24.7% and 9.0% respectively, over the same month last year;
- This month the national average daily room rate jumped 14.1% to \$141.72. Again, the increase was largely driven by a 66.2% increase in daily rates in BC, with downtown Vancouver registering increases of 94.3% and Whistler posting gains of 69.4% compared with the same time last year;
- Year-to-date, seven out of the 13 provinces/ territories posted gains in the average revenue generated per available room with BC (+52.4%) posting the strongest growth followed by Newfoundland and Labrador (+7.7%) and PEI (+6.4%), over the same period in 2009;
- Year-to-date, properties with over 500 rooms posted the highest average occupancy rate of 62.5%, up 1.3% over last year, followed closely by properties with 201-500 rooms with an occupancy rate of 60.0% (up 1.1%). Properties with less than 50 rooms posted the lowest occupancy rates averaging 42.3% year-to-date.