



Canadian Tourism
Commission

Commission canadienne
du tourisme

Canada

Tourism Snapshot

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

Key highlights

International travellers made 657,104 trips to Canada in January 2011, a 2.4% increase over 2010. Arrivals from the United States edged up 1.4%, while arrivals from other countries also registered a gain of 4.7%.

China, Australia and Brazil were the top performers, posting increases in overnight arrivals of 37.0%, 20.6% and 19.4% respectively over 2010.

Arrivals from Mexico improved by 2.3% in January, representing a fourth consecutive monthly increase in overnight trips to Canada.



Tourism review **Inbound highlights**

Overnight trips to Canada

	Jan. 2011	11/10 Jan. % Change
Americas*		
United States		
Automobile	241,721	-3.9
Plane	180,496	8.0
Other	29,666	9.2
US Total	451,883	1.4
Mexico	6,353	2.3
Americas Total	458,236	1.4%
Overseas Key Markets		
France	21,409	2.5
Germany	10,897	-9.0
UK	29,106	-9.2
China	13,274	37.0
Japan	7,776	-10.2
South Korea	10,943	9.1
Australia	15,668	20.6
India**	6,501	1.8
Brazil**	7,927	19.4
Overseas Key Markets	123,501	3.5%
As % of Overseas and Americas	21.2%	
Other Overseas Countries	75,367	7.1%
Non-US Countries	205,221	4.7%
Total Countries	657,104	2.4%

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 was a 2.4% increase in total overnight trips to Canada in January 2011, with a reported 657,104 visitors;
- In the first month of 2011, trips from the Americas markets (the US and Mexico) improved by 1.4%, reaching 458,236 overnight trips;
- Overnight trips to Canada from countries other than CTC key markets grew by 7.1%, totalling 75,367. Overnight visits from all countries excluding the US grew by 4.7% to 205,221.

United States

- Overnight travel to Canada from the US increased by a more moderate 1.4% in January 2011. This was an improvement compared with the 7.9% drop experienced in January 2010;
- This month, the number of car trips decline by 3.9%, while both the numbers of overnight arrivals in Canada via “other” modes of travel (+9.2%) and plane travel (+8.0%) increased, over the same month in 2010;
- US overnight visits to the majority of provinces and territories increased this month, with the exception of New Brunswick (-12.3%), Manitoba (-0.7%) and Ontario (-0.4%).

Mexico

- Overnight visitation from Mexico grew 2.3% in January 2011, reaching 6,353.

Overseas key markets

- Overnight trip arrivals to Canada from CTC key overseas destinations improved by 3.5% in January 2011 on the same month last year, moderately down from the 4.8% gain seen in December 2010;
- In January 2011, visits from CTC key overseas destinations (excluding the US and Mexico) represented 18.8% of all visitors to Canada, a two-point decline over 2010;
- The majority of CTC key overseas destinations saw a rise in overnight visitor numbers, with the exception of Japan (-10.2%), the UK (-9.2%) and Germany (-9.0%);
- This month, China posted the strongest rise in overnight trips (+37.0%), followed by Australia (+20.6%) and Brazil (+19.4%).

Travel Characteristics Highlights (Q3-2010)

Overnight Trips to Canada

	Trips '000	10/09 Q3 %	Spend \$M	10/09 Q3 %	Average Trip Duration	10/09 Q3 %	Average Spend per Trip	10/09 Q3 %	Average Spend per Night	10/09 Q3 %
United States Leisure										
Automobile	2,939	2.9%	1,263.4	2.8%	4.3	-5.3%	430	-0.1%	100	5.6%
Plane	850	2.9%	770.5	1.9%	6.1	3.0%	907	-1.0%	149	-3.9%
Other	729	2.4%	340.9	13.0%	3.3	6.0%	468	10.4%	142	4.2%
U.S. Leisure Total	4,518	2.8%	2,375	3.8%	4.5	-2.0%	526	1.0%	117	3.1%
Total U.S. MC & IT	444	-5.0%	379	0.7%	3.6	-2.3%	854	6.0%	234	8.5%
Total U.S.	4,962	2.0%	2,754	3.4%	4.4	-1.9%	555	1.3%	126	3.3%
Mexico	44	-19.5%	65	-12.8%	21.4	-2.3%	1467	8.3%	68	10.9%
Americas Total	5,007	1.8%	2,819.2	3.0%	4.6	-2.8%	563	1.1%	124	4.1%
Overseas Key Markets										
United Kingdom	258.4	-0.8%	302.7	-9.2%	14.1	-5.5%	1,171	-8.5%	83	-3.2%
France	183.2	4.2%	245.1	0.2%	15.4	-3.7%	1,325	-4.8%	87	-0.1%
Germany	145.3	9.2%	229.5	7.5%	18.1	-6.6%	1,520	-5.2%	87	5.5%
Japan	79.5	23.3%	141.9	31.3%	13.3	-4.1%	1,491	-11.1%	134	11.0%
South Korea	57.6	22.8%	86.7	14.6%	22.1	-4.7%	1,505	-6.7%	68	-2.1%
China	76.2	37.1%	130.2	46.9%	27.9	34.1%	1,634	2.5%	80	4.2%
Australia	63.8	0.2%	102.8	0.7%	13.7	0.5%	1,612	0.5%	117	0.1%
India	51.9	27.2%	52.4	37.1%	20.2	-3.0%	1,010	7.8%	50	11.2%
Brazil	26.3	44.5%	49.5	65.4%	11.5	-30.1%	1,719	4.5%	163	63.7%
Total Overseas Key Markets	942	9.7%	1,340.9	8.6%	16.2	-3.5%	1,423	-0.9%	88	2.6%

Source: Statistics Canada, International Travel Survey, preliminary estimates

- During the third quarter of 2010, US overnight spending in Canada increased by 3.4% to \$2.8 billion, largely driven by gains in US leisure spending. While the average trip duration of US visitors declined to four nights, the average spend per night and per trip increased 3.3% and 1.3% respectively compared with Q3 2009;
- In Q3 2010, Brazil (+65.4%), China (+46.9%), India (+37.1%), Japan (+31.3%) and South Korea (+14.6%) posted double-digit year-on-year gains in spending in

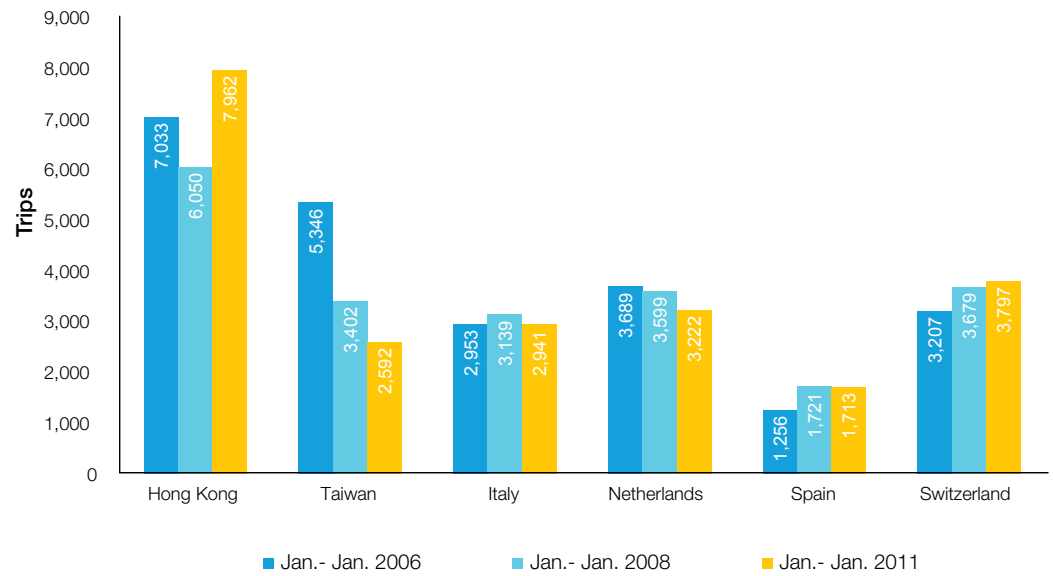
Canada. Brazil saw the strongest gain in the average spend per night - up 63.7% - followed by India and Japan, up 11.2% and 11.0% respectively;

- From July to September 2010, with \$1,719 Brazil reported the highest average spend per trip, despite reporting the second lowest average trip duration (after the US) of 11 nights.

Market Watch

- In January 2011, three of the six selected secondary markets posted increases in overnight trip volumes over 2006;
- Spain registered the greatest rise (+36.4%) in overnight trips to Canada over January 2006, followed by Switzerland (+18.4%), and Hong Kong (+13.2%);
- Overnight trips from the Netherlands and Taiwan declined relative to January 2006, down 12.7% and 12.2% respectively.

Overnight trips to Canada, by selected markets



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

Competitive review (September 2010)

International Travel, January–September 2010 (in thousands)

Trips From:	Trips To:							
	Canada		United States		United Kingdom		Australia	
	#	10/09 Change	#	10/09 Change	#	10/09 Change	#	10/09 Change
Total International	13,139	2%	45,290	11%	22,500	-2%	4,198	6%
Americas								
United States	9,573	0%	...	...	2,079	-10%	345	0%
Mexico ¹	101	-34%	9,936	10%	57	-15%	...	...
Overseas Key Markets								
France	359	7%	1,018	9%	2,746	-6%	69	8%
Germany	282	9%	1,298	3%	2,302	9%	111	1%
United Kingdom	589	1%	2,869	-1%	...	...	421	-4%
China ²	155	22%	620	55%	113	11%	341	23%
Japan	186	23%	2,569	18%	168	-5%	298	15%
South Korea	134	19%	843	50%	...	...	157	17%
Australia	187	14%	666	27%	764	6%	...	...
India	106	20%	531	19%	280	27%	101	8%
Brazil	62	29%	839	37%	...	...	19	6%
Canada	...	...	15,643	11%	541	0%	86	2%
Total Key Markets	11,735	0%	36,832	17%	9,050	-1%	1,928	6%

...Not applicable or data not available.

¹ US figures for Mexico include arrivals to interior only.

² US figures for China includes Hong Kong, SAR.

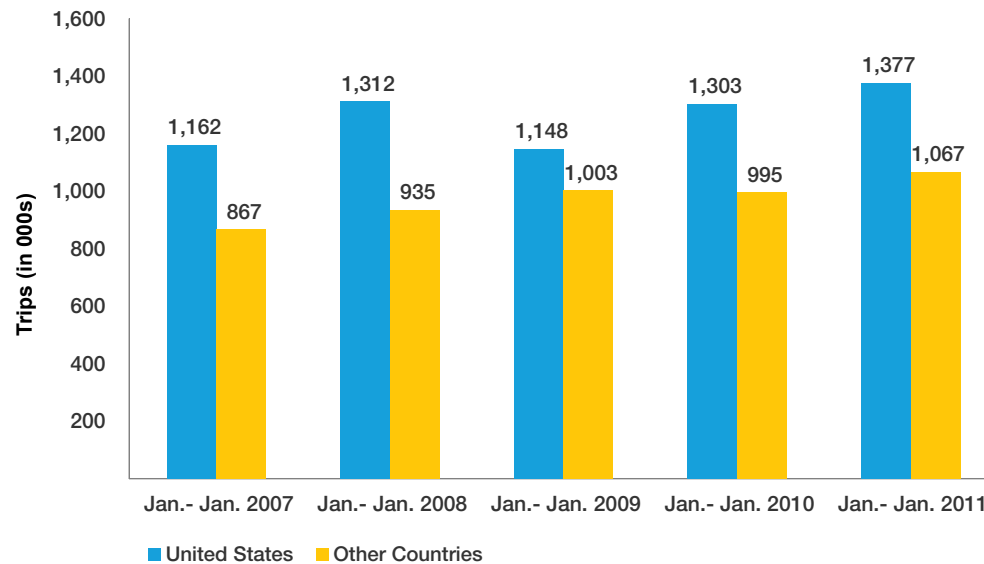
Note: Statistics Canada preliminary figures.

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

- Year-to-date September 2010, Canada posted moderate growth (+2%) in visitor arrivals. Elsewhere the UK reported a 2% decline while the US (+11%) and Australia (+6%) saw more robust growth;
- In the first nine months of 2010, Canada posted the strongest increase in arrivals from Japan (+23%), with the US and Australia reporting gains of 18% and 15% respectively. The UK reported a 5% decline;
- Year-to-date September 2010, the UK outperformed Canada, the US and Australia in attracting overnight visitors from India: with a 27% increase in trips.
- The UK posted a notable decline in visitor arrivals from France (-6%) while numbers were up in the US (+9%), Australia (+8%) and Canada (+7%).

Canadian outbound trips

Overnight trips by Canadians



- Canadian outbound travel to the US increased 5.7% in January 2011 over 2010, with travel to non-US destinations also improving by 7.2%;
- In January 2011, Nova Scotia reported the greatest increase in the total number of Canadian residents travelling to countries other than the US (+53.7%), followed by Quebec (+15.4%) and New Brunswick (+14.2%);
- Total overnight travel to the US by British Columbians increased by 9.6% in January 2011, with Quebec, Ontario and Alberta also posting increases of 7.1%, 3.5% and 1.9%

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

Overnight trips by Canadians

	Jan. 2011	11/10 Jan. % Change	Jan.-Jan. 2010	Year-to-date % Change
United States	1,377,270	5.7	1,377,270	5.7
Other Countries	1,066,995	7.2	1,066,995	7.2
Total Trips from Canada	2,444,265	6.4	2,444,265	6.4

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

Consumer outlook

Consumer confidence

- **Canada:** The Index of Consumer Confidence increased by 7.1 points to 88.1 (2002 = 100) this month, higher than it was two years ago during the recession but below the optimism expressed in early 2010.
- **USA:** The Conference Board Consumer Confidence Index®, which had dipped in December 2010, increased in January. The Index now stands at 60.6 (1985=100), up from 53.3 in December.

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

Accomodations

- Please note at the time of publication we were unable to update Canada's Accomodations Table as a result of PKF Consulting Inc.'s Trends in the Canadian Hotel Industry national market report not being available.