



Tourism Snapshot

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



Key highlights

In January 2010, visits from CTC's key overseas markets fell by 2.6% over January 2009. Notable was the increases from India (+17.7), France (+13.6%) and Japan (+6.6%).

With an economic recovery underway and a weakening Canadian dollar, Canadian travel abroad in January registered a gain of 6.8% as travel to the US edged up by 13.5% while visits to overseas destinations decreased -0.8% over last year.

The introduction of new visa requirements for Mexican traveling to Canada continues to significantly hinder inbound travel to Canada with Mexico registering the most significant drop (-52.4%), followed by Australia, (-14.6%) and Germany (-7.9%).

Tourism review In bound highlights

Overnight trips to Canada

	January 2010	10/09 Jan. % Change
Americas*		
United States		
Automobile	251,510	-11.7
Plane	167,439	-2.9
Other	27,905	-0.9
U.S. Total	446,854	-7.9
Mexico	6,209	-52.4
Americas Total	453,063	-9.1
Overseas Key Markets		
France	20,895	13.6
Germany	11,981	-7.9
UK	32,069	-4.5
China	9,686	-12.9
Japan	8,656	6.6
South Korea	10,034	-6.7
Australia	12,996	-14.6
India**	6,388	17.7
Brazil**	6,641	-3.7
Overseas Key Markets	119,346	-2.6
As % of Overseas and Americas	20.8%	
Other Overseas Countries	70,396	-5.6
Non-US Countries	195,951	-6.8
Total Countries	642,805	-7.6

Note: Statistics Canada preliminary estimates.

Source: Statistics Canada, *International Travel Survey*.

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

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

International trips

- International travellers made 642,805 overnight trips to Canada in the month of January, a 7.6% drop over January 2009;
- Total trips from CTC emerging markets increased by 5.7%, while there were declines in Asia and European markets of 8.5% and 0.1% respectively over 2009;
- Trips from the Americas (the US and Mexico market) fell 9.1% to 453,063 trips in January 2010;
- January travel from overseas key markets declined 2.6%, an improvement on the 6.4% drop in December;
- The first month of 2010 saw the number of overnight trips to Canada from overseas countries other than CTC key markets fall by 5.6% to 70,396 compared with January 2009.

United States

- In January 2010, total overnight trips from the US continued to decline, falling 7.9% to 446,854 visitors, the lowest January level in 10 years;
- This month, car trips declined at a significantly higher rate (-11.7%) than both plane (-2.9%) and "other" modes (-0.9%);
- With the exception of Saskatchewan (+18.1%) and Yukon (+14.1%), US overnight visits to all other provinces and territories decreased this month.

Mexico

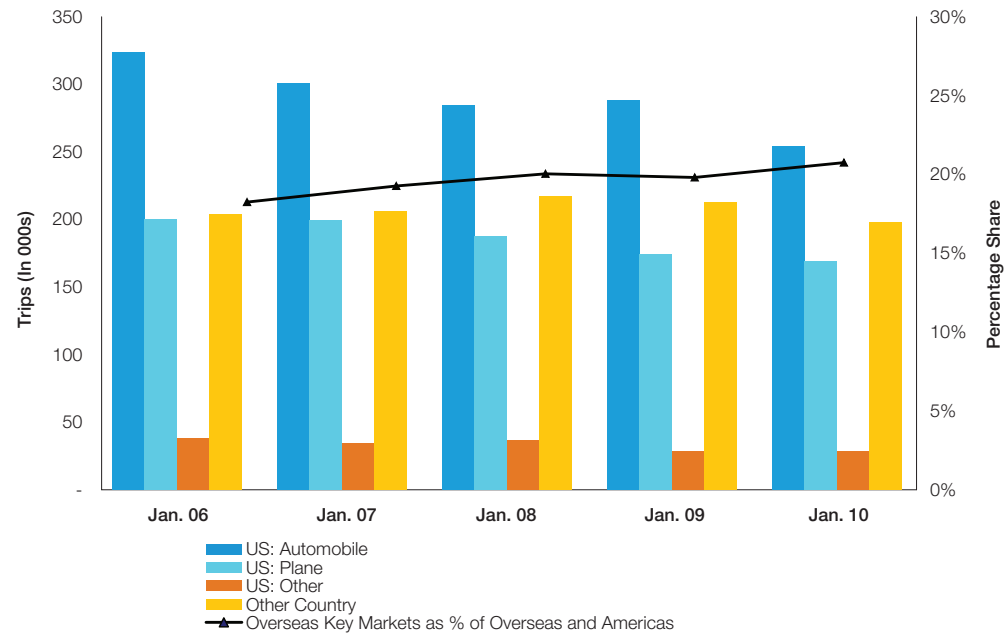
- Trips from Mexico fell 52.4% in January, which was the largest decline among CTC key markets.

Share of entry (January, 2010)

Overseas key markets

- In January 2010, visitors from CTC's core overseas markets represented 20.8% of all visitors, a 2.7 point gain when compared with January 2009;
- Canada saw a significant increase in travel from France (+13.6%), a great improvement on the 0.1% gain seen in December 2009;
- Traveller numbers from the UK contracted by 4.5% (compared with -16.8% in December), falling to 32,069 visitors;
- Japan was the only Asian market to post an increase in travel to Canada (up 6.6%), while Australia, China and South Korea posted declines of 14.6%, 12.9%, and 6.7% respectively. For a second month in a row, travel from India (+17.7%) grew over the same month in 2009.

Overnight trips by non-residents



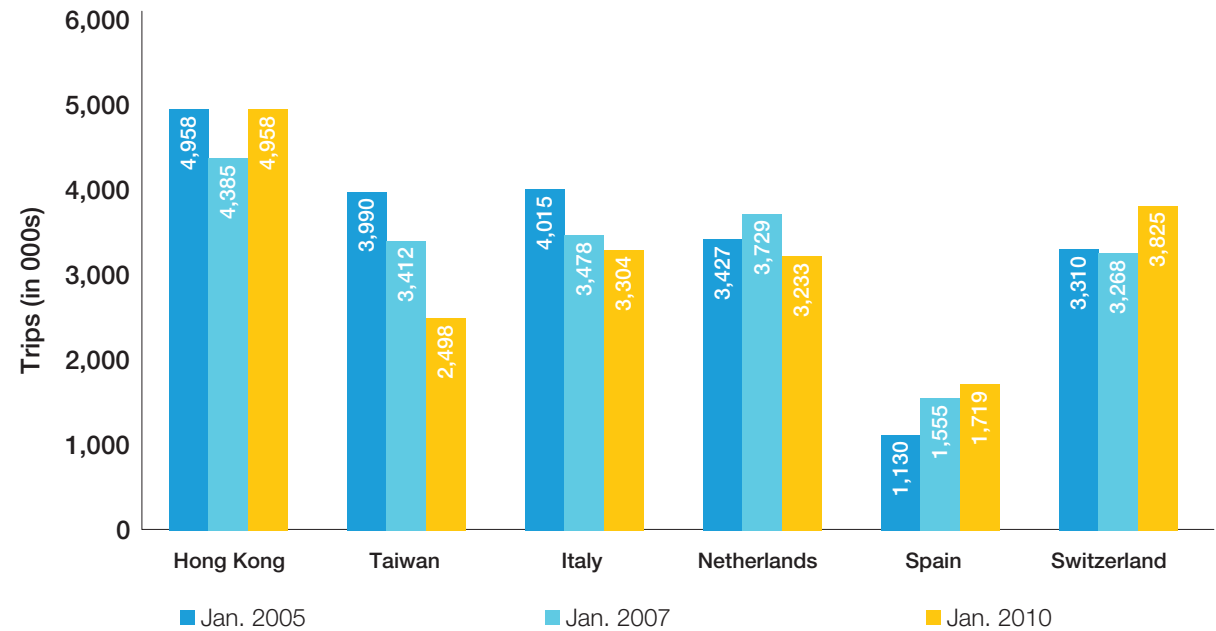
Note: Statistics Canada preliminary estimates. Source: Statistics Canada, *International Travel Survey*.

- Canada received 446,854 overnight US visitors in January, which accounted for a 2.0% decline in market share compared to January 2009;
- In the first month of 2010, automobile travel accounted for 56.3% of all travel from the US, while plane and "other" modes of travel represented 37.5% and 6.2% respectively;
- The Americas accounted for 79.2% of visitors from CTC's key markets, a decline of 4.0 points in share of entry over the same period in 2005;
- In January, overnight visitors from key European markets made 64,945 trips to Canada accounting for 11.3% of total trips from key markets, a gain of 2.5 points in share of entry over January 2005. Of all key market trips, the UK accounted for the largest portion at 5.6%, followed by France at 3.7% and Germany at 2.1%;
- Visitors from Asian key markets made 41,372 trips in January, accounting for a 1.1 point in share of entry of total trips from key markets.

Market Watch

- Canada welcomed 4,958 visitors from Hong Kong in January 2010, returning to 2005 travel levels;
- Spain and Switzerland continued to show significant growth over 2005, up 52.1% and 15.6% respectively;
- Trips from Taiwan, Italy, and the Netherlands declined relative to January 2005 levels with declines of 37.8%, 17.7% and 5.7% respectively.

Trips to Canada, by selected markets



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

Competitive review (January-November 2009)

International travel, January-November 2009 (in 000s)

Trips From:	Trips To:					
	Canada		United States		Australia	
	#	09/08 Change	#	09/08 Change	#	09/08 Change
Total International	14,832	-8%	43,625	-6%	4,936	-1%
Americas						
United States	11,028	-7%	...	...	427	4%
Mexico ¹	161	-35%	5,261	-5%	...	...
Overseas Key Markets						
France	383	-3%	1,112	-3%	82	8%
Germany	295	-3%	1,560	-6%	141	-1%
United Kingdom	663	-17%	3,582	-15%	564	-1%
China ²	151	1%	589	0%	335	3%
Japan	186	-29%	2,653	-12%	321	-24%
South Korea	128	-26%	663	-6%	162	-20%
Australia	187	-15%	652	4%	...	...
India	101	-4%	517	-9%	112	7%
Brazil	56	-14%	776	15%	...	...
Canada	...	...	16,786	-6%	107	-2%
Total Key Markets	133,339	-8%	34,151	-7%	2,251	-5%

...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.

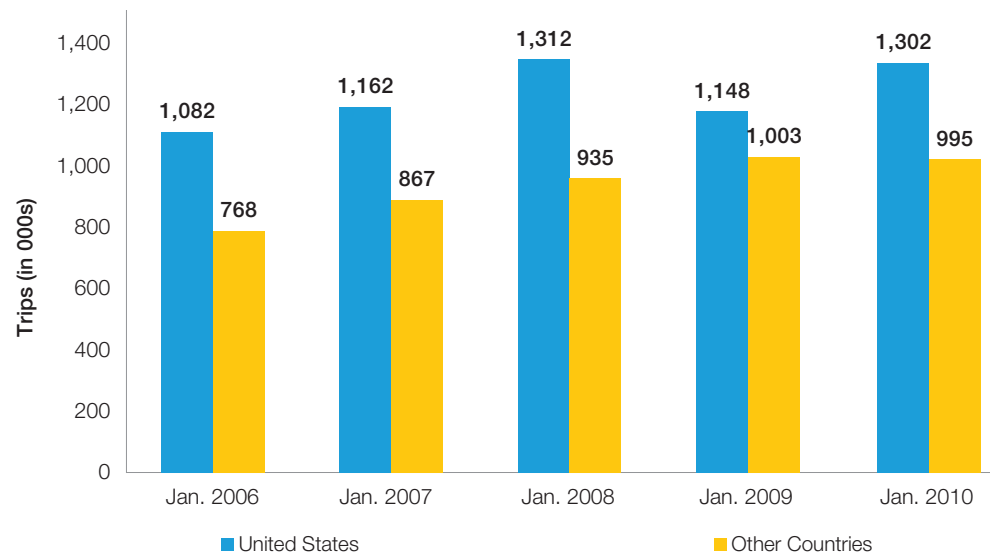
Sources: Statistics Canada; Tourism Australia; and ITA, and Office of Travel and Tourism Industries (USA).

Note: Statistics Canada preliminary figures.

- From January to November 2009, international travel to Canada, the US and Australia posted declines of 8%, 6% and 1% respectively over 2008;
- The US saw declines in travel from Japan (-12%), South Korea (-6%) and an increase in Australian travel (+4%); while Canada experienced drops of 29%, 26% and 15% respectively;
- Of the three destinations, Australia outperformed both Canada and the US in terms of market growth: France up 8%, India up 7%, and China up 3% over November year to date 2008;
- While Canada experienced a 14% decline in travellers from Brazil, the US saw an increase of 15% reaching 776,000 visitors.

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 weakening Canadian dollar, Canadian outbound travel to the US rose 13.4% over the same period last year with 1.3 million outbound trips;
- Outbound travel to international destinations other than the US fell by 0.8% over January 2009 to 995,195 outbound trips;
- Travel to the US from all provinces increased with Yukon, PEI and Saskatchewan posting the greatest gains of 68.8%, 50.0% and 25.7% respectively;

Consumer outlook

Consumer Confidence

- **Canada:** The index of Consumer Confidence rose 13.8 percentage points in January to a 23-month high, according to the Conference Board's Index of Consumer Confidence-January 2010. The Index of Consumer Confidence now stands at 96.6 (2002 = 100).
- **USA:** The Conference Board Consumer Confidence Index®, which had increased in December improved further in January. The index now stands at 55.9 (1985 = 100), moderately up from 53.6 in December, but significantly up from 37.4 in January 2009.

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