



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

2012 started on a relatively good note with seven out of eleven markets (CTC's target countries) registering growth in January. CTC's combined emerging/transition markets led the pack, recording growth of 12.9% followed by the US (+0.4%), while combined core markets registered a 3.4% drop;

Germany gained momentum with a third consecutive gain (+9.2%), while Australia registered a third consecutive monthly drop (-0.7%);

The UK returned to negative territory (-6.9%) after a rebound in December 2011 with a 9.7% gain; likewise France experienced a 7.2% drop following twenty consecutive monthly increases since April 2010.

Japan maintain its upward trend, posting a third consecutive gain (+16.3%) while South Korea maintained its downward trend (-17.1%);

China gained significantly more momentum, recording an impressive 44.4% increase; likewise India maintained its upward trend, but with a more moderate gain of 3.9%;

Mexico maintained its upward trend with double-digit growth (+16.0%) while Brazil registered a more moderate but second consecutive monthly gain (+2.8%).

# Tourism review Inbound highlights

## Overnight trips to Canada

	Jan. 2012	12/11 Dec. % Change
<b>United States</b>		
Automobile	237,405	-1.8
Plane	184,516	1.5
Other	33,456	12.0
<b>US Total</b>	<b>455,377</b>	<b>0.4</b>
<b>Core Markets</b>		
UK	27,105	-6.9
France	19,871	-7.2
Germany	11,896	9.2
Australia	15,554	-0.7
<b>Core Total</b>	<b>74,426</b>	<b>-3.4%</b>
<b>Emerging/ Transition Markets</b>		
Japan	9,043	16.3
South Korea	9,073	-17.1
Mexico	7,370	16.0
Brazil**	8,151	2.8
China	19,166	44.4
India**	6,754	3.9
<b>Emerging/ Transition Total</b>	<b>59,557</b>	<b>12.9%</b>
<b>Overseas Key Markets</b>	<b>133,983</b>	<b>3.2%</b>
Other Overseas Countries	80,888	7.3%
Non-US Countries	214,871	4.7%
<b>Total Countries</b>	<b>670,248</b>	<b>1.8%</b>

Note: Statistics Canada preliminary estimates.

Source: Statistics Canada, International Travel Survey.

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

## International trips

- Canada received 670,248 international visitors for the month of January 2012, recording a 1.8% increase compared with the same month in 2011.
- In January 2012, overnight arrivals from CTC's core markets (the UK, France, Germany and Australia) decreased by 3.4%, dropping to 74,726 arrivals.
- Overnight trips to Canada from CTC's emerging/ transition markets (Japan, South Korea, Mexico, Brazil, China and India) grew by 12.9%, reaching 59,557 trips.

## United States

- The number of overnight arrivals from the US edged up (+0.4%) in January 2012, largely driven by the increase in travel by plane (+1.5%);
- In January 2012, the largest number of overnight US visitors came to Canada through Ontario (108,020 entries) followed by British Columbia (45,321 entries) and Québec (33,371 entries).

## Core Markets

- Germany gained momentum with a third consecutive gain (+9.2%), while Australia registered a third consecutive monthly drop (-0.7%);
- The UK returned to negative territory (-6.9%) after a rebound in December 2011 with a 9.7% gain; likewise France experienced a 7.2% drop after twenty consecutive monthly increases since April 2010;
- Overnight arrivals from the CTC's core markets in January 2012 edged down by 3.4%. The gain from Germany was not enough to offset the losses incurred in France, the UK and Australia.

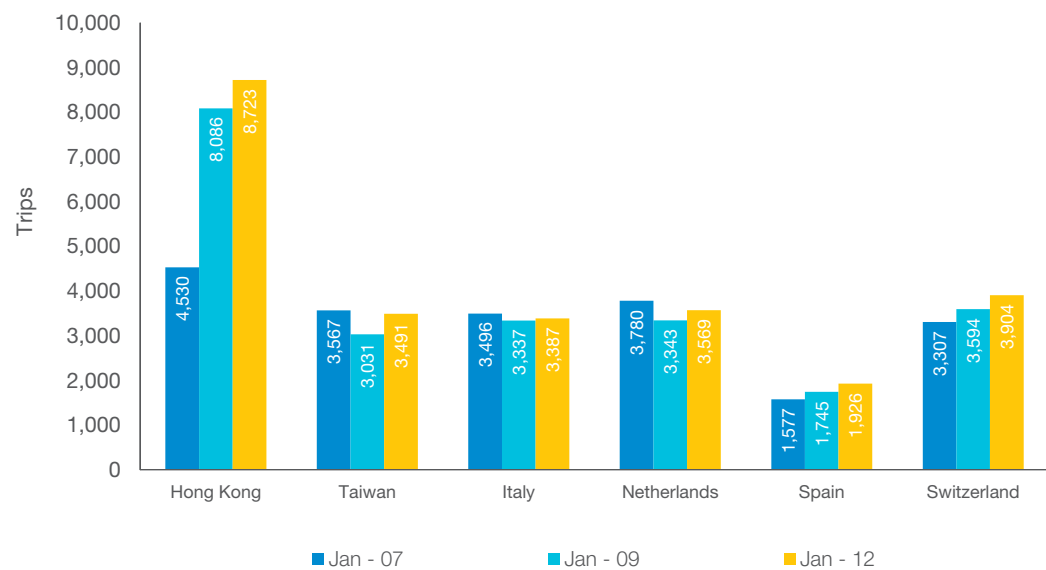
## Emerging/ Transition Markets

- In January 2012, the number of overnight trips from the CTC's emerging/transition markets grew by 12.9%, largely driven by increases from China, Japan and Mexico;
- Japan maintain its upward trend, posting a third consecutive gain (+16.3%) while South Korea maintained its downward trend (-17.1%);
- China gained significantly more momentum, recording an impressive 44.4% increase; likewise India maintained its upward trend, but with a more moderate gain 3.9%;
- Mexico maintained its upward trend with double-digit growth (+16.0%) while Brazil registered a more moderate but second consecutive monthly gain (+2.8%).

## Market Watch

- In January 2012, overnight arrivals from Taiwan grew significantly by 34.7% over the same month in 2011; likewise Hong Kong posted a 9.6% increase over last year;
- Among the selected European markets, Italy registered the largest gain (+15.2%) followed by Spain (+12.4%) and Netherlands (+10.8%);
- When compared with January 2007, Hong Kong (92.6%) saw the largest gain in overnight arrivals to Canada followed by Spain (+22.1%) and Switzerland (+18.1%).

## Overnight trips to Canada, by selected markets



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

## Overnight trips to Canada, by selected markets

	Jan. 2012	12/11 Jan. % Change
Italy	3,387	15.2
Netherlands	3,569	10.8
Spain	1,926	12.4
Switzerland	3,904	2.8
Hong Kong	8,723	9.6
Taiwan	3,491	34.7

# Travel Characteristics Highlights (Q3-2011)

## Overnight Travel Spending

	Trips '000	11/10 Q3 %	Spend \$M	11/10 Q3 %	Average Trip Duration	11/10 Q3 %	Average Spend per Trip	11/10 Q3 %	Average Spend per Night	11/10 Q3 %
United States										
United States Leisure										
Automobile	3,442	17.1%	1,399.6	10.5%	4.1	-5.3%	407	-5.7%	99	-0.4%
Plane	819	-3.7%	752.6	-1.9%	6.4	4.5%	919	1.9%	145	-2.6%
Other	689	-5.6%	310.7	-9.1%	3.3	-0.4%	451	-3.7%	135	-3.3%
<b>U.S. Leisure Total</b>	<b>4,949</b>	<b>9.6%</b>	<b>2,463</b>	<b>3.7%</b>	<b>4.4</b>	<b>-3.0%</b>	<b>498</b>	<b>-5.4%</b>	<b>114</b>	<b>-2.4%</b>
Total U.S. MC & IT	473	6.3%	418	10.2%	3.8	3.6%	884	3.7%	234	0.1%
<b>Total U.S.</b>	<b>5,422</b>	<b>9.3%</b>	<b>2,880</b>	<b>4.6%</b>	<b>4.3</b>	<b>-2.5%</b>	<b>531</b>	<b>-4.3%</b>	<b>123</b>	<b>-1.9%</b>
Overseas Key Markets										
Core Markets										
United Kingdom	238.0	-7.9%	301.6	-0.3%	13.5	-3.9%	1,267	8.2%	94	12.6%
France	188.7	3.0%	273.4	11.5%	15.4	-0.5%	1,325	-1.0%	94	8.8%
Germany	134.7	-7.3%	220.8	-3.8%	17.4	-4.2%	1,520	-3.8%	94	8.4%
Australia	77.5	21.5%	123.1	19.7%	13.8	0.7%	1,588	-1.5%	115	-2.2%
<b>Total Core Markets</b>	<b>638.9</b>	<b>-1.8%</b>	<b>918.9</b>	<b>4.4%</b>	<b>14.9</b>	<b>-2.7%</b>	<b>1,438</b>	<b>6.3%</b>	<b>96</b>	<b>9.3%</b>
Emerging/ Transition Markets										
Japan	80.0	0.6%	154.3	8.7%	14.4	8.2%	1,491	-16.5%	134	-0.2%
South Korea	49.2	-14.6%	77.6	-10.5%	21.7	-1.9%	1,577	4.8%	73	6.8%
Mexico	47.1	6.3%	66.6	2.5%	20.8	-2.9%	1,415	-3.6%	68	-0.7%
Brazil	29.9	13.7%	57.1	15.4%	17.4	50.8%	1,719	-8.7%	110	-32.7%
China	98.0	28.6%	174.5	34.1%	27.9	30.3%	1,634	-4.4%	83	3.6%
India	56.4	8.7%	56.6	7.9%	24.0	18.9%	1,003	-0.7%	42	-16.5%
<b>Total Emerging/ Transition Markets</b>	<b>360.6</b>	<b>7.4%</b>	<b>586.8</b>	<b>11.6%</b>	<b>19.9</b>	<b>6.8%</b>	<b>1,627</b>	<b>3.9%</b>	<b>82</b>	<b>-2.7%</b>
<b>Total Overseas Key Markets</b>	<b>1000</b>	<b>1.3%</b>	<b>1,505.7</b>	<b>7.1%</b>	<b>26.3</b>	<b>-1.2%</b>	<b>1,506</b>	<b>5.7%</b>	<b>57</b>	<b>7.0%</b>

Source: Statistics Canada, International Travel Survey, preliminary estimates

## Overnight Travel Spending

- During the third quarter 2011, overall travel spending by US visitors grew by 4.6% to \$2.88 billion despite the drop in the average spend per trip (-4.3% to \$531). Average spend per trip by US MC & IT increased by 3.7% to \$884, which was much higher than the average by the US Leisure travellers (\$498);
- In Q3 2011, total spending by travellers from CTC's overseas key markets grew by 7.1% to \$1.506 billion. China recorded the largest increase (+34.1%) in overnight travel spending, reaching 174.5 million followed by Australia (+19.7%) and Brazil (+15.4%);
- Despite the average expenditure per trip dropping to \$1,719 per overnight visitor, down 8.7% over Q3 2010, Brazil posted the highest level among CTC's overseas key markets followed by China (\$1,634).

# Competitive review (December 2011)

## International Travel (in thousands)

Trips From:	Trips To:					
	Canada		United States		Australia	
		11/10 Change		11/10 Change		11/10 Change
<b>Total International</b>	15,976	-1%	62,325	4%	5,875	0%
United States	11,557	-2%	...	...	456	-3%
Canada	...		21,028	5%	118	-3%
<b>Core Markets</b>						
United Kingdom	680	-5%	3,835	0%	608	-6%
France	459	5%	1,504	12%	94	-3%
Germany	316	-5%	1,824	6%	154	-4%
Australia	242	4%	1,038	15%	...	...
<b>Emerging/ Transition Markets</b>						
Japan	211	-10%	3,250	-4%	333	-16%
South Korea	151	-8%	1,145	3%	198	-8%
Mexico <sup>1</sup>	132	10%	13,414	0%	...	...
Brazil	88	10%	1,508	26%	29	7%
China	244	25%	1,089	36%	542	19%
India	139	9%	663	2%	148	7%
<b>Total Key Markets</b>	<b>14,219</b>	<b>-1%</b>	<b>50,299</b>	<b>4%</b>	<b>2,680</b>	<b>-2%</b>

...Not applicable. or data not available.

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

Note: Statistics Canada preliminary figures.

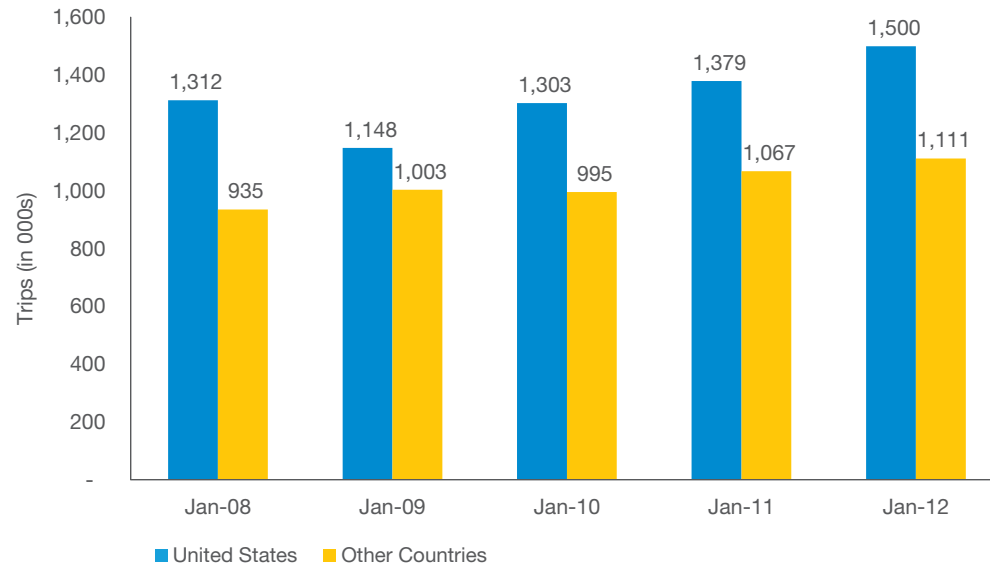
Sources: Statistics Canada; Tourism Australia, ITA Office of Travel and Tourism Industries (USA).

- In 2011, overall international travel to Canada contracted by 1%, while the US reported a 4% increase and Australia saw no change compared with 2010;
- The US outperformed Canada in arrivals posting double-digit growth from Australia (+15%) and France (+12%), while overnight arrivals from these key markets to Canada grew by 4% and 5% respectively;
- Canada experienced a 9% increase in overnight arrivals from India, outperforming Australia (+7%) and the US (+2%);
- Canada also distanced the US in arrivals from Mexico with a 10% increase;
- Although Canada and Australia recorded strong gains in arrivals from China, up 25% and 19% respectively, the US outperformed both competitors with an impressive 36% increase;
- While both Canada and Australia saw declines from Germany, down 5% and 4% respectively, the US posted a 6% gain;
- The US saw a 3% increase in overnight arrivals from South Korea, while Australia and Canada experienced drops, down 8% each;
- The US posted a notable 26% increase in visitation from Brazil, outperforming both Canada (+10%) and Australia (+7%).



# Canadian outbound trips

## Overnight trips by Canadians



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

- In January 2012, Canadian outbound travel grew by 6.7% to 2.6 million overnight trips;
- The number of Canadians visiting the US during January 2012 increased by 8.7% compared to the same month last year, reaching 1.5 million overnight trips;
- Canadian overnight travel to overseas destinations (excluding the US) grew by 4.1% to 1.1 million trips;
- The largest re-entry of Canadians from the US occurred through Ontario, with 347,539 entries, followed by British Columbia (140,458 entries) Québec (128,737 entries) and Alberta (126,139 entries);
- The largest re-entry of Canadians from overseas (excluding the US) were recorded at Ontario port of entries (532,833 entries), followed by Québec (268,718 entries) and British Columbia (152,853 entries).

## Overnight trips by Canadians

	Jan. 2012	12/11 Dec. % Change
United States	1,499,593	8.7
Other Countries	1,111,158	4.1
<b>Total Trips from Canada</b>	<b>2,610,751</b>	<b>6.7</b>

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

# Consumer outlook

## Consumer confidence

- **Canada:** The Index of Consumer Confidence continued a roller-coaster ride this month, as the national index increased 4 points to 73.9 (2002 = 100). This is a welcome development, coming after last month when the index dropped to its lowest level in more than two years. However, even with January's positive showing, the index remains 14.3 points below where it was at the same time last year.
- **USA:** The Conference Board Consumer Confidence Index<sup>®</sup>, which had increased in December, retreated in January. The Index now stands at 61.1 (1985=100), down from 64.8 in December.

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

## Accommodations

Please note at the time of publication we were unable to update Canada's Accommodations Table as a result of PKF Consulting Inc.'s "Trends in the Canadian Hotel Industry National Market Report" not being available.