



Canadian Tourism
Commission

Commission canadienne
du tourisme

Canada

Tourism Snapshot

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

A photograph of three people (two women and one man) laughing and holding coffee cups in front of a building with warm, glowing lights and string lights. The scene is set at night, creating a cozy and inviting atmosphere. The building has a rustic feel with wooden accents and hanging plants. The lighting is warm and golden, highlighting the people and the textures of their clothing and the building's facade.

Key highlights

In November 2011, overnight trips from CTC's overseas key markets grew by 5.4% relative to the same month in 2010, reaching 107,733 trips. Gains recorded in the CTC's emerging/transition markets (+13.6%) more than compensated for slight decline in overnight arrivals from core markets (-0.2%);

Germany rebounded from four consecutive monthly declines with a 16.0% increase relative to the same month in 2010, while Australia experienced a setback (-6.9%) following seven consecutive monthly gains;

Mexico maintained its upward trend with an eighth consecutive monthly increase (+26.9%), while South Korea's downward trend cooled down (-0.2%), almost reaching parity with the same month last year;

China pursued its upward momentum, recording an eighth consecutive month of double-digit increase in overnight arrivals (+27.6%); likewise India also maintained its upward trend with a sixth consecutive monthly increase (+25.3%);

Year to date November 2011, key overseas CTC markets were up 0.5%. Strong performances in China (+24.2%), Mexico (+9.2%), Brazil (+9.0), India (+7.7%), France (+5.4%) and Australia (+5.1%) more than offset losses incurred from Japan (-11.2%), South Korea (-7.9%), the UK (-5.4%) and Germany (-5.2%).

Tourism review **Inbound highlights**

Overnight trips to Canada, November 2011

	Nov. 2011	11/10 Nov. % Change	Jan.- Nov. 2011	Year-to-date % Change
United States				
Automobile	324,082	-1.7	6,200,142	-4.5
Plane	225,689	-1.7	3,265,781	1.8
Other	34,855	12.7	1,347,844	1.5
US Total	584,626	-0.9	10,813,767	-2.0
Core Markets				
UK	25,211	-4.6	632,894	-5.4
France	15,704	1.8	430,502	5.4
Germany	10,862	16.0	302,148	-5.2
Australia	9,094	-6.9	221,259	5.1
Core Total	60,871	-0.2	1,586,803	-1.2
Emerging/Transition Markets				
Japan	10,160	0.6	198,517	-11.2
South Korea	6,980	-0.2	140,931	-7.9
Mexico	5,294	26.9	121,415	9.2
Brazil**	3,444	-0.5	78,768	9.0
China	13,870	27.6	227,074	24.2
India**	7,114	25.3	128,867	7.7
Emerging/ Transition Markets Total	46,862	13.6	895,572	3.8
Overseas Key Markets	107,733	5.4	2,482,375	0.5
Other Overseas Countries	80,028	4.1	1,638,569	2.4
Non-US Countries	187,761	4.8	4,120,944	1.3
Total Countries	772,387	0.4	14,934,711	-1.1

Note: Statistics Canada preliminary estimates.

Source: Statistics Canada, *International Travel Survey*.

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

International trips

- Canada received 772,387 international visitors for the month of November 2011, edging up by 0.4% compared with the same month in 2010. Year-to-date to November, overall international travel to Canada reached 14.9 million overnight arrivals, which was below 2010 by 1.1%;
- The November 2011 overnight arrivals from CTC's core markets (the UK, France, Germany and Australia) edged down (-0.2%) to 60,871 arrivals, bringing year-to-date overnight arrivals to 1,586,803, -1.2% lower than the same period last year;
- Overnight trips to Canada from CTC's emerging/ transition markets (Japan, South Korea, Mexico, Brazil, China and India) grew by 13.6% in November 2011, reaching 46,862 trips. Over the first eleven months of 2011, overnight arrivals from these markets increased by 3.8% over 2010, totalling 895,572 trips.

United States

- The number of overnight arrivals from the US slipped by 0.9% in November 2011; declines in auto travel and air travel (-1.7%) were more than offset by entry to Canada by other modes of travel (+12.7%);
- Year-to-date to November, overall arrivals from the US contracted by -2.0%, which driven by the decline in auto travel (-4.5%), fell to 10.8 million overnight trips;
- In November 2011, the largest number of overnight US visitors came to Canada through Ontario (128,176 entries) followed by British Columbia (46,712 entries) and Québec (45,185 entries).

Core Markets

- In November 2011, Germany rebounded from its downward trend with a 16.0% increase relative to the same month in 2010, while Australia experienced a setback (-6.9%) following seven consecutive monthly gains;
- France (+1.8%) maintained its upward trend, recording a eighteenth consecutive monthly increases, while the UK (-4.6%) continued its downward slide, which was initiated last summer;
- Year to date to November, overall arrivals from the CTC's core markets edged down by -1.2%. Gains made by France (+5.4%) and Australia (+5.1%) were not enough to offset the losses incurred in the UK (-5.4%) and Germany (-5.2%).

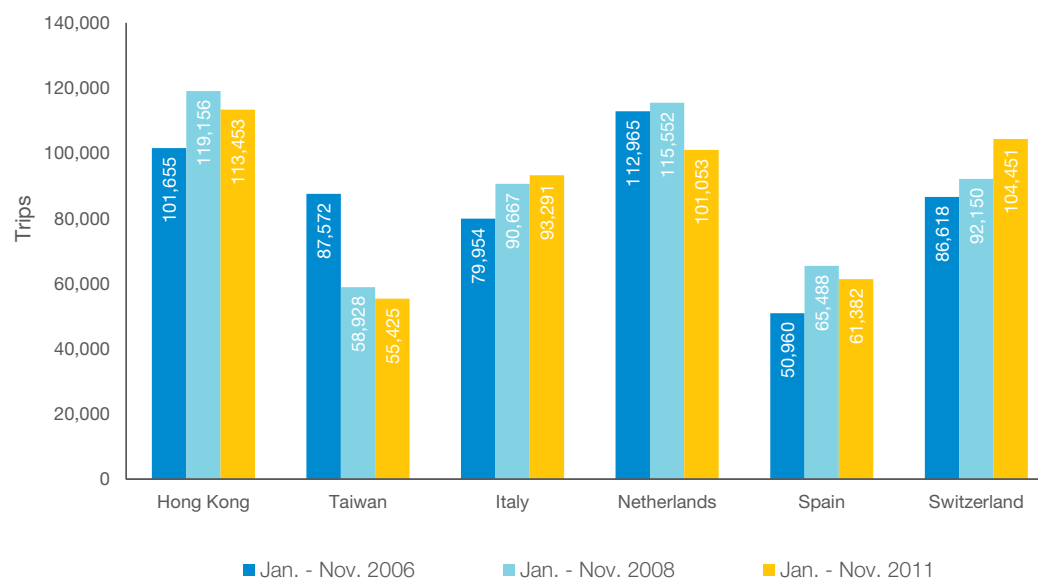
Emerging / Transition Markets

- In November 2011, the number of overnight trips from the CTC's emerging/transition markets grew by 13.6%, largely driven by increases from China, Mexico and India;
- Mexico maintained its upward trend with an eighth consecutive monthly increase (+26.9%), while South Korea's downward trend cooled down (-0.2%), almost reaching parity with the same month last year;
- China continued its upward momentum, recording an eighth consecutive month of double-digit increase in overnight arrivals (+27.6%); likewise India also maintained its upward trend with a sixth consecutive monthly increase (+25.3%);
- Japan rebounded from its downward trend and recorded positive growth (+0.6%) in November overnight arrivals for the first time in 2011;
- Year-to-date to November 2011, China leads all CTC target markets with a 24.2% increase over the same period in 2010 followed by Mexico (+9.2%) and Brazil (+9.0%).

Market Watch

- In November 2011, overnight arrivals from Taiwan grew by 18.7% over November 2010 while Hong Kong fell by -6.8%. Spain also recorded a double-digit increase, up 12.3%, while the Netherlands registered a 3.3% gain;
- Year-to-date to November 2011, Taiwan posted the largest gain (+9.8%) among those selected secondary markets, while Italy saw the largest drop (-3.3%) on a year over year basis;
- Year-to-date, Switzerland (+20.6%) saw the largest gain in overnight arrivals to Canada, followed by Spain (+20.5%), Italy (+16.7%) and Hong Kong (+11.6%) when compared with the same period five year ago in 2006.

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

	Nov. 2011	11/10 Nov. % Change	Jan.- Nov. 2011	Year-to-date % Change
Italy	3,865	1.3	93,291	-3.3
Netherlands	3,582	3.3	101,053	-3.1
Spain	2,012	12.3	61,382	-1.1
Switzerland	3,452	0.8	104,451	4.6
Hong Kong	5,411	-6.8	113,453	7.6
Taiwan	2,252	18.7	55,425	9.8

Competitive review (October 2011)

International Travel (in thousands)

Trips From:	Trips To:					
	Canada		United States		Australia	
	#	11/10 Change	#	11/10 Change	#	11/10 Change
Total International	14,162	-1%	52,644	5%	4,682	0%
United States	10,229	-2%	362	-5%
Canada	...		18,206	6%	91	-5%
Core Markets						
United Kingdom	608	-5%	3,286	0%	459	-4%
France	415	6%	1,312	14%	75	-5%
Germany	291	-6%	1,582	6%	122	-4%
Australia	212	6%	873	17%
Emerging/ Transition Markets						
Japan	188	-12%	2,713	-5%	271	-18%
South Korea	134	-8%	967	4%	160	-9%
Mexico ¹	116	9%	10,917	0%
Brazil	75	10%	1,218	28%	22	6%
China	213	24%	940	36%	444	20%
India	122	7%	587	2%	119	6%
Total Key Markets	12,604	-2%	42,600	4%	2,123	-2%

...Not applicable or data not available.

¹ US figures for Mexico include arrivals to interior only.

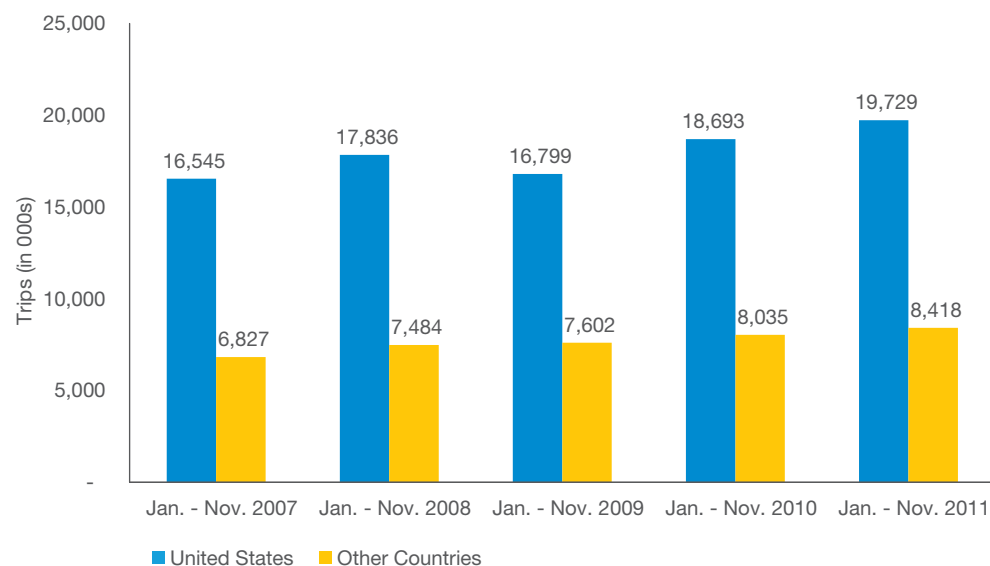
Note: Statistics Canada preliminary figures.

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

- Year-to-date to October 2011, overall international travel to Canada contracted by 1%, while the US reported a 5% increase and Australia saw no change compared with the same period last year;
- From January to October 2011, the US outperformed Canada in arrivals posting double-digit growth from Australia (+17%) and France (14%), while overnight arrivals from these key markets to Canada grew by 6% each;
- Canada experienced a 7% increase in overnight arrivals from India, outperforming Australia (+6%) and the US (+2%);
- Canada also distanced the US in arrivals from Mexico with a 9% gain over last year;
- Although Canada and Australia recorded strong gains in arrivals from China, up 24% and 20% respectively, the US outperformed both competitors with an astonishing 36% increase;
- While both Canada and Australia saw declines from Germany, down 6% and 4% respectively, the US posted a 6% gain from this market;
- The US saw a 4% increase in overnight arrivals from South Korea, while Australia and Canada experienced drops, down 9% and 8% respectively;
- The US posted a notable 28% increase in visitation from Brazil, outperforming both Canada (+10%) and Australia (+6%).

Canadian outbound trips

Overnight trips by Canadians



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

Overnight trips by Canadians

	Nov. 2011	11/10 Nov. % Change	Jan.-Nov. 2011	Year-to-date % Change
United States	1,523,299	1.2	19,728,866	5.5
Other Countries	577,855	0.7	8,418,267	4.8
Total Trips from Canada	2,101,154	1.1	28,147,133	5.3

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

- In November 2011, Canadian outbound travel edged up (+1.1%) to 2.1 million overnight trips. Year-to-date to November, there were 28 million Canadian outbound trips, up 5.3%;
- The number of Canadians visiting the US during November 2011 increased by 1.2% compared to last year, reaching 1.5 million overnight trips. Year-to-date to November, approximately 19.7 million Canadians made overnight trips to the US, up 5.5% relative to the same period last year;
- Canadian overnight travel to overseas destinations (excluding the US) edged up by 0.7% in November, bringing a year-to-date increase to 4.8%;
- In November 2011, the largest re-entry of Canadians from the US occurred through Ontario, with 734,482 entries, followed by British Columbia (300,554 entries) and Québec (186,277 entries);
- Year-to-date to November, the largest re-entry of Canadians from overseas (exclude the US) were recorded at Ontario port of entries (4.1 million), followed by Québec (2.1 million), British Columbia (1.2 million) and Alberta (0.7 million).

Consumer outlook

Consumer confidence

- **Canada:** After dropping to its lowest level in more than two years in October, the Index of Consumer Confidence turned around this month, increasing 4.7 points to 76.4 (2002 = 100). Despite this significant increase, confidence levels remain well off their most recent highs, likely reflecting continued uncertainty in the global economy and the related instability in financial markets.
- **USA:** The Conference Board Consumer Confidence Index®, which had declined in October, improved in November. The Index now stands at 56.0 (1985=100), up from 40.9 in October.

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

Accommodations

- In November 2011, the National Occupancy Rate grew slightly by 1.8% to 59.6% compared with 57.9% in November 2010. The Northwest Territories posted the largest increase (+7.0%) while New Brunswick recorded the largest decline (-2.4%);
- Year-to-date to November, the National Occupancy Rate saw a marginal increase of 0.9%, now standing at 62.6%;
- The November Average Daily Rate edged up by 1.4% to \$122.66 compared with \$120.92 in November 2010;
- Year-to-date to November, the average Revenue per Available Room (RevPAR) saw a marginal increase of 0.9%, edging up to \$79.64. The Northwest Territories, Newfoundland and Labrador, Québec, Saskatchewan, British Columbia and Alberta posted rates above the national average.

Canadian Occupancy Rates, By Province*

	Nov. 2011	11/10 Change [^]	Jan. - Nov. 2011	Year-to-date Change [^]
Alberta ¹	67.3	3.4	63.4	3.7
British Columbia	50.5	1.7	61.2	-0.4
Saskatchewan	75.4	-0.6	69.7	-0.9
Manitoba	69.2	1.9	67.8	1.5
Ontario	61.5	1.4	62.4	0.6
Quebec	58.5	1.1	63.8	1.8
New Brunswick	53.1	-2.4	56.7	-1.0
Nova Scotia	57.2	4.2	62.0	-0.4
Newfoundland	70.4	3.1	70.0	0.4
Prince Edward Island	42.4	1.3	52.2	3.0
Northwest Territories	70.3	7.0	69.0	8.4
Yukon	65.5	1.7	74.2	1.0
Canada	59.6	1.8	62.6	0.9

* Note: Based on the operating results of 216,474 rooms (unweighted data).

[^] Percentage points.

¹ Excluding Alberta resorts.

Source: PKF Consulting Inc. with reproduction and use of information subject to PKF Disclaimer and Restrictions as detailed at www.pkfcanada.com

CTC Market Research & Evaluation