



Tourism Snapshot

2011 Year-in-review

Tourism in the Canadian Economy

Tourism Demand (2011)

	\$ billions	11/10 %
Total demand	78.8	7.5
Domestic	63.7	8.9
International	15.1	1.8
Tourism GDP	31.3	6.8

Source: Statistics Canada, National Tourism Indicators (2011 Q4 Revised)

- In 2011, overall tourism demand grew 7.5% reaching \$78.8 billion with domestic demand registering an 8.9% increase to \$63.7 billion. Likewise international demand edged up by 1.8% to \$15.1 billion.
- Total Tourism Gross Domestic Product (GDP) reached \$31.3 billion in 2011 making up 1.9% of Canada's GDP.

International Travel Account (2011)

	Receipts		Payments		Balance of Payments
	\$ billion	11/10%	\$ billion	11/10%	\$ billion
US	7.0	-3.3%	20.0	9.8%	-12.97
Overseas	9.5	6.1%	12.8	4.2%	-3.28
Total	16.5	1.9%	32.8	7.5%	-16.25

Source: Statistics Canada, International Travel Accounts 2012 Q1, preliminary

- Receipts from overseas travellers to Canada increased by 6.1% over 2010, reaching \$9.5 billion, while receipts from the US decreased 3.3% dropping to \$7 billion.
- Canadians spent more in 2011 in both the US and abroad with payments increasing 9.8% and 4.2% respectively.
- Canada's international travel account deficit (balance of payment) was \$16.25 billion in 2011, a 14% increase over 2010.
- The US travel deficit widened to \$13 billion (+18.6%) while the overseas travel deficit narrowed to 3.3 billion (-1.2%).

Tourism highlights (Inbound)

Overnight trips to Canada (2011)

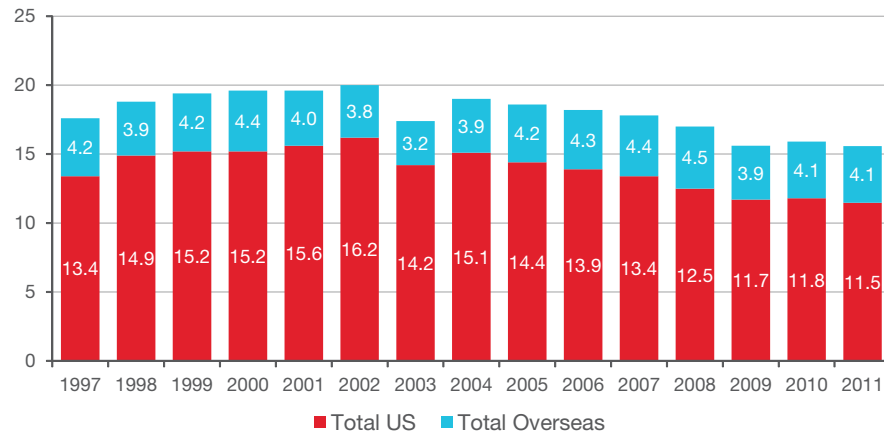
	Trips '000	11/10 %	Spending \$ B	11/10 %
Total International (Total US & Overseas)	15,576	-1.8%	11.9	0.1%
Total United States	11,471	-2.4%	6.1	-2.4%
United States Leisure	9,714	-2.9%	4.6	-4.6%
United States MC & IT	1,757	1.0%	1.5	4.9%
Proportion (%) United States / Total International	73.6%	-0.4	51.1%	-1.4
Core Markets	1,551	-2.3%	2.2	0.0%
United Kingdom	623	-5.8%	0.8	-5.8%
France (territories removed)	422	3.4%	0.5	3.4%
Germany	290	-8.0%	0.4	-8.0%
Australia	216	6.8%	0.4	6.8%
Emerging/ Transition Markets	925	2.4%	1.4	6.0%
Japan	187	-13.4%	0.3	-13.4%
South Korea	140	-11.0%	0.2	-11.0%
Mexico	124	7.2%	0.2	11.9%
Brazil	74	3.9%	0.1	1.5%
China	237	22.4%	0.4	29.5%
India	163	8.7%	0.2	11.2%
CTC Key Overseas (Core and Emerging/Transition Markets)	2,475	-0.6%	3.6	2.3%
Proportion (%) CTC Key Overseas / Total International	15.9%	0.2	30.1%	0.7
Other Overseas	1,630	0.1%	2.2	3.8%
Proportion (%) Other Overseas Countries / Total International	10.5%	0.2	18.8%	0.7
Total Overseas	4,105	-0.3%	5.8	2.8%

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

- In 2011 Canada received 15.6 million international overnight visitors, down 1.8% compared with 2010, largely driven by a 2.4% decrease from the US market.
- Spending by international overnight visitors remained relatively unchanged (+0.1%) over 2010, contributing \$11.9 billion towards Canadian economy. An increase of 2.8% in total spending by overseas visitors offset a spending reduction by US visitors (-2.4%).
- Nearly three quarters of all travel to Canada originated from the US while US spending only accounted for roughly half (51%) of all international expenditures.
- Although 15.9% of all international travel originated from CTC's key overseas markets, spending by these visitors accounted for over 30% of total international spending. China registered a notable increase of nearly 30%, surpassing Australia in terms of spending.
- While 53% of all travel from the US was for pleasure purposes, only 40% of travellers from CTC's key markets indicated pleasure was their main trip purpose. 33% of visitors from CTC's key markets mentioned visiting family and relatives as their primary purpose.
- A large proportion of arrivals from the US and CTC's key markets were made during the summer months (July-September), 42% and 40% respectively.

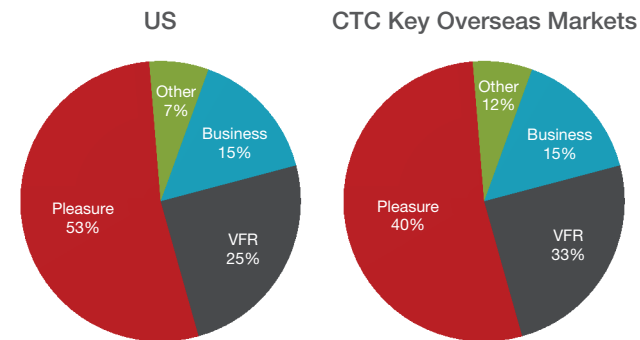
Tourism highlights

International tourists to Canada, overnight trips (millions)



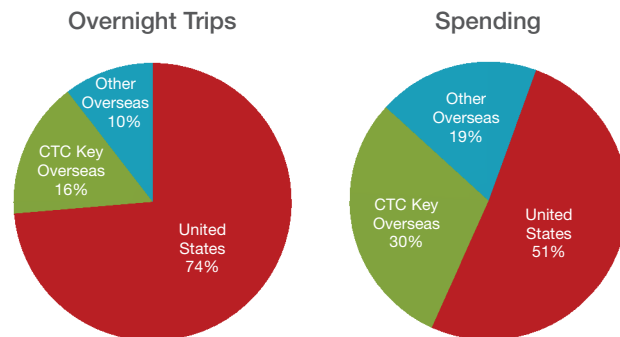
Source: Statistics Canada, *International Travel Survey*

Distribution of Tourists by Purpose (Number of Trips)



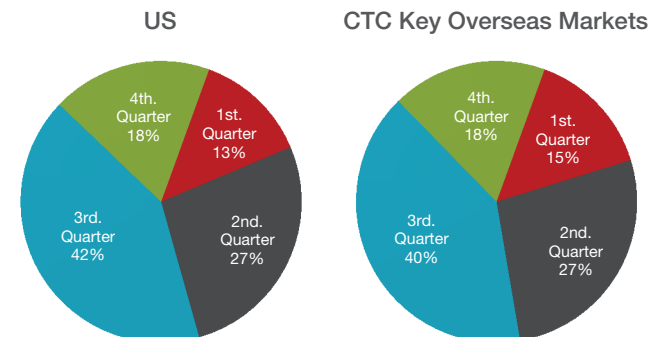
Source: Statistics Canada, *International Travel Survey*

Proportion of Overnight Trips and Spending



Source: Statistics Canada, *International Travel Survey*

Distribution of international tourists to Canada by quarter (Number of Trips)



Source: Statistics Canada, *International Travel Survey*

Competitive review

International Travel, January-December 2011 ('000)

CTC key markets	Canada	11/10	US	11/10	UK	11/10	Australia	11/10
United States	11,471	-2%	-	-	2,845	5%	456	-3%
UK	623	-6%	3,835	0%	-	-	608	-6%
France	422	3%	1,504	12%	3,624	0%	94	-3%
Germany	290	-8%	1,824	6%	2,932	-2%	154	-4%
Australia	216	7%	1,038	15%	1,091	11%	-	-
Japan	187	-13%	3,250	-4%	236	6%	333	-16%
South Korea	140	-11%	1,145	3%	-	-	198	-8%
Mexico	124	7%	13,414	0%	78	15%	-	-
Brazil	74	4%	1,508	26%	275	55%	29	7%
China	237	22%	1,089	36%	180	28%	542	19%
India	163	9%	663	2%	353	-5%	148	7%
Total Key Markets	13,946	-2%	29,271	3%	11,614	3%	2,562	-2%
Total international markets	15,576	-2%	62,325	4%	30,678	3%	5,875	0%

Source: Statistics Canada, International Travel Survey, preliminary estimates
Office of Travel and Tourism Industries (US), Office for National Statistics (UK)
Tourism Australia

- In 2011, overall international travel to Canada contracted 2%, while the US and UK reported increases of 4% and 3% respectively. Australia saw no change compared with 2010.
- When looking at overall performance by CTC's key markets, the US and the UK saw a 3% increase while Canada and Australia experienced a 2% decrease.
- As a whole all four countries saw strong growth from the emerging markets. Although the UK, Canada and Australia recorded strong gains in arrivals from China, up 28%, 22% and 19% respectively, the US outperformed these competitors with a notable 36% increase. As for visitation from Brazil, The UK posted an impressive 55% increase, outperforming the US (+26%), Australia (+7%) and Canada (+4%).

Tourism Highlights (Outbound)

Overnight Trips by Canadians

CTC key markets	Trips ('000)	11/10 %	Spending (\$ millions)	11/10 %
United States	21,043	5.4%	16,127	9.5%
Overseas Countries	9,106	4.5%	12,195	4.2%
Total	30,150	5.1%	28,322	7.1%

- Over 30 million Canadian outbound trips were made in 2011, up 5.1% compared to 2010. The number of Canadians visiting the US increased 5.4% compared to 2010, reaching 21 million overnight trips, while Canadian overnight travel to overseas destinations (excluding the US) grew 4.5%, bringing the 2011 total to 9.1 million.
- In 2011, Canadians spent over 28 billion during their trips to the US and other overseas destinations, a 7.1% gain relative to 2010.
- Travel spending in the US posted a larger increase (+9.5%) than spending in other overseas destinations (+4.2%).

Top Ten Overseas Countries Visited by Canadians – 2011

	Trips ('000)	Spending (\$ millions)	Average Trip Duration
Mexico	1,506	1,525	11
Cuba	1,020	720	8
United Kingdom	866	1,004	12
France	733	946	12
Dominican Republic	729	642	9
Italy	382	484	10
Germany	336	293	10
Mainland China	308	515	20
Spain	229	267	11
Netherlands	216	160	7

Key highlights by market 2011

US Leisure

- In 2011, the US saw steady yet modest economic recovery with GDP growth of 1.7%¹. Consumer confidence undoubtedly improved since the 2008-2009 recession, however many US consumers still approach leisure travel planning and purchasing with extreme caution.
- US leisure travel represents Canada's largest inbound travel market, accounting for 62% of all travellers in 2011.
- US leisure travel to Canada saw a 2.9% decrease over 2010, dropping to 9.7 million overnight arrivals. The majority of declines occurred in Q1 (-4.5%) and Q3 (-4.3%).
- Total spending by US leisure travellers decreased 4.6% to \$4.6 billion in 2011 with the average spend per trip dropping 1.7% to \$475.
- Decreases in travellers were seen across all age groups with an exception of "55 years of age or older". This age demographic represents the largest segment among US leisure visitors to Canada, accounting for 44.7% of all overnight US leisure visitors to Canada in 2011.
- "Shopping" was the most popular activity in 2011 with "sightseeing" being second among US leisure travellers .
- In 2011, the Northwest Territories was the only province which showed growth in visitation by US leisure travellers, up 16.2%. Newfoundland experienced the largest decline (-11.8%) in overnight visits followed by Nova Scotia (-9.4%).

US Meetings Conventions and Incentive Travel (MC&IT)

- MC&IT travel from the US is Canada's second largest inbound market after the US leisure market.
- In 2011, 1.8 million US MC&IT overnight travellers visited Canada, a moderate 1% increase over the previous year. Of those travellers, roughly 68% were male and 55% were 45 years of age or older.
- An 8.2% increase in overnight US business travel in the 2nd quarter offset the losses incurred in Q1 (-1.4%), Q3 (-1.8%) and Q4 (-2.1%) .
- Total spending by this market increased roughly 5% to \$1.5 billion, with the average spend per business trip increasing nearly 4% to \$847.
- Staying only at the hotel was the most popular choice among US business travellers, accounting for 85% of all accommodation stay.
- US MC&IT travel to Prince Edward Island (-51.5%) and the Yukon (-42.1%) slowed significantly in 2011, while Newfoundland (+22%) and Saskatchewan (+9%) had an increased number of province visits.

Key highlights by market 2011

UK

- The UK represents Canada's largest inbound overseas market. However, the Eurozone debt crisis continued to have a significant impact on consumer confidence and outbound travel demand in the UK in 2011. UK's economic performance remained fragile with minimal GDP growth of 0.7%^{*1}.
- In 2011, the number of UK overnight visitors to Canada fell 5.8% to just under 623K trips with the largest drop (-12.8%) coming from VFR travel (Visit Friends and Relatives), followed by pleasure travel (-9.1%). VFR and pleasure travel combined accounted for 77% of overall visitation from the UK.
- Although some improvement in visitation from the UK was seen in the last quarter in 2011, the first three quarters recorded year over year declines of 14.6%, 2.7% and 7.9%, respectively.
- Total overnight spending by UK visitors contracted 2.4% to \$791.6 million, while the average spend per trip increased 3.6% to \$1,271.
- Those 55+ represented the largest segment of travelling from the UK, making up just over 43% of all visitors in 2011 and rising in proportion by 3.2%.
- In step with the decrease in VFR travel, the most popular accommodation choice among UK travellers was a hotel stay (up 5.8%), while staying with friends and family became the second popular choice in 2011.
- In 2011, Ontario and British Columbia remained the most popular destinations among UK visitors, followed by Alberta and Québec.

France

- Despite moderate GDP growth of 1.7%^{*1} and a relatively high unemployment rate of 9.3%, overall French outbound travel grew by 2%^{*2}.
- France, Canada's second largest overseas inbound market, experienced a 3.4% increase, reaching to 421,800 trips. This increase was largely driven by pleasure and VFR travel, up 11% and 8.2%, respectively. Pleasure travel accounted for 48% of all overnight arrivals from France.
- Spending by overnight French travellers recorded a 2% increase in 2011, reaching \$537.7 million.
- The average trip duration of a French traveller was 16 days. During this period, they spent on average \$1,275, down 1.3% compared with 2010.
- A large proportion (45%) of French travellers chose to visit Canada during the summer months (July through September) over other seasons.
- Similar to previous years, French travellers reported shopping, sightseeing and visiting friends and relatives as their top activities.
- The majority of French travellers visited Québec, reaching just over 330K visits, up 8.1% relative to 2010.

Key highlights by market 2011

Germany

- As Europe's strongest economy, Germany reported stable GDP growth of 3.1%¹ in 2011, despite the European debt crisis and economies stagnating or contracting elsewhere in the euro zone.
- Although Germans showed a preference for staying closer to home with the number of domestic trips rising, overall outbound travel from Germany grew slightly by 1%².
- In 2011, overnight trips from Germany fell 8%, dropping to 290K trips. In the first three quarters, arrivals to Canada dropped 27.3%, 5% and 7.4% respectively. However, there was a slight improvement (+ 3%) in arrivals in the fourth quarter of 2011 compared with the same quarter in 2010.
- While the number of travellers visiting for pleasure purposes remained relatively flat, travel for VFR and other purposes saw significant declines of nearly 22% and 27%.
- Spending by overnight German travellers fell 5.8% decline in 2011, dropping to \$448.9 million.
- Unique to the German market, the third most popular tourism related activity, after shopping and sightseeing, was visiting national or state nature parks.
- Ontario reclaimed top spot as the province receiving the most Germans with BC falling back to 2nd place followed in third by Québec and Alberta.

Australia

- Australia posted GDP growth of 2.1%¹ in 2011, albeit at a slower pace than in recent years. The boom in outbound travel by Australians continued through 2011 with a 9.6%³ surge, supported by the strong Australia dollar against other major currencies.
- Canada welcomed 216K overnight travellers from Australia (up 6.8% over 2010), with the majority coming during the second (31.4%) and third quarter (35.9%).
- Year over year growth in spending (+10.1%) by overnight Australian visitors exceeded growth in arrivals, with Aussies spending \$388.7 million.
- Pleasure travel accounted for nearly 60% of all overnight trips from Australia, the highest proportion of pleasure travel among CTC's key overseas markets.
- On average, Australians spent 15 days in Canada with spending on average \$1,801 per trip, second highest only to Brazil.
- This year, 46% of Australian visitors to Canada were 55+, the highest proportion across CTC's key overseas markets.
- In 2011, while British Columbia remained the most popular province among Australian travellers, Prince Edward Island and Nova Scotia saw large gains in province visits.

Japan

- The March 11th 2011 Great East Japan Earthquake and nuclear power plant crisis hit Japan when its economic recovery appeared to be back on track. The economy contracted in 2011 with negative GDP growth of 0.7%¹ as manufacturing slowed, a resulting impact from the disaster.
- Japanese outbound travel saw a swift recovery with 2011 total departures ending at a 2.1%⁴ growth over 2010.
- Over all arrivals from Japan fell by more than 13%. Post disaster contributed most to this decline with a 30% drop in Q2, however Q1 also saw a 24% decrease in arrivals.
- Pleasure travel registered the largest decline (-24%) followed by travel for other purpose (-13%) and business travel (-10%) while VFR travel posted nearly 10% increase.
- Total spending by Japanese travellers did not fall relative to trips, experiencing a 7% drop resulting in an increase in average spending per trip at 7.5% to \$1,616.
- Top mentioned tourism-related activities were shopping, sightseeing, and visiting national or state nature parks.
- Although the majority of province visits were made to British Columbia and Ontario, interest in the North (Yukon and Northwest Territories) has increased more than double over 2010.

Key highlights by market 2011

South Korea

- Following a 6.3%^{*1} expansion in 2010, South Korea's economy slowed with 3.6%^{*1} GDP growth in 2011 resulting from a decrease in exports as well as weaker domestic spending.
- Despite weaker consumer confidence lead by this economic slowdown, as well as concerns over crisis in the world (Japan, Eurozone, and Middle East), overall outbound travel in 2011 grew by 1.6%^{*5} over 2010.
- South Korea experienced downturn trend in overnight arrivals to Canada with an 11% drop, largely driven by a 29% dip in travel for other reasons (including study and education related travel), which accounted for almost 30% of total arrivals from this country.
- In contrast, pleasure travel saw an 8.5% increase over 2010, which accounted for approximately 19% of overall South Korean arrivals.
- Total expenditures shrank 10.4%, falling to \$230 million in 2011. On average, South Koreans spent more than 27 days in Canada, spending \$60 per night.
- Almost 28% of travellers to Canada from South Korea were younger than 24, the highest proportion among CTC's key markets and presumably driven by a robust student market.
- In 2011, over half of South Korean travellers visited British Columbia with a quarter of all travel to Ontario and one fifth to Alberta.

Mexico

- In 2011, Mexico achieved moderate economic growth of 3.9%^{*1}, while consumer sentiment deteriorated towards the last quarter.
- Mexican outbound travel contracted 1%^{*6} compared to the previous year. This decrease was led primarily due to uncertainty created by poor global economic performance but also by an increase in domestic tourism. During 2011, more travellers preferred to stay within the country.
- Trips by Mexicans grew 7.2% over 2010; however, 2011 levels are still below peak levels achieved in 2008. Since 2009 Mexican travel has been weakening, first with the onset of the H1N1 flu virus and then dramatically impacted by visa restrictions placed on travellers.
- Mexican visitors spent almost \$176 million during their visits in Canada, an 11.9% increase over 2010.
- Trip purpose was essentially split among four major reasons; business (26%), VFR (21%), pleasure (26%) and other reasons (27%).
- A surge in travellers between 25 and 34 years of age occurred in 2011 with travel by this segment increasing 50%, although the largest group of travellers to Canada were those 24 and younger comprising of 27% of all travellers from Mexico.
- In 2011, British Columbia was the most popular Canadian destination capturing 39% of all province visits, followed by Ontario at 28% and Québec at 23%.

Brazil

- In 2011, Brazil's economy grew at a slower pace than a year ago, experiencing GDP growth of 2.7%^{*1}.
- Brazilian outbound travel expanded 2%^{*6} over 2010 to 5.4 million^{*6}. This trend in outbound travel is largely driven by a strong currency and a desire to shop abroad.
- Trips to Canada from Brazil registered a moderate increase of 3.9% with total spending also growing 1.5% compared to 2010.
- On average, Brazilian travellers stayed in Canada for a period of 19 days, spending \$1,837 per trip. Despite a 2.3% decrease from 2010, Brazil captured top spot in terms of spend per trip among CTC's key markets.
- Almost 30% of Brazilian travellers visited Canada for other reasons, which include study and education related trips. Brazil presented the highest proportion of other purpose trips among CTC's key markets.
- More Brazilian travellers enjoyed shopping during their visit in Canada with "go shopping" being the most popular activity, up 1.9% over 2010.
- Despite a 10.7% decrease, Ontario captured almost half of the provincial visits made by Brazilian travellers. The second most popular destination was Québec (24%) followed by British Columbia (15%).

Key highlights by market 2011

China

- Although the Chinese economy slowed with GDP growth of 9.2%*1 in 2011, China continued to outpace other economies. A combination of weaker international demand for made in China goods and domestic policies have cut into growth.
- Chinese people made approximately 70 million*7 overseas trips in 2011, an increase of more than 20%*7 from the 57.4 million*7 trips in 2010.
- Since the granting of ADS (Approved Destination Status) in June 2010, overnight arrivals to Canada increased tremendously. Continuing this momentum in 2011, Chinese overnight arrivals were up 22.4% reaching 236,600 trips.
- Chinese travellers spent \$408 million while in Canada, up 29.5% compared with 2010. On average, they spent \$1,724 per person trip and stayed on average 29 days.
- In 2011, 38% of overnight Chinese travellers visited Canada for the main purpose of visiting friends and family, second highest only to India. Other reasons (including study/education related travel) became the second most popular reason at 27% of all Chinese visitors.
- The most popular activity among Chinese travellers while in Canada was to “go shopping” followed by “go sightseeing” and “visit friends or relatives”.
- In 2011, British Columbia was the most popular Canadian destination capturing 37% of all province visits followed by Ontario (32%) , Québec (12%) and Alberta (10%).

India

- India's economy slowed with 7.5%*1 GDP growth in 2011 due to concerns over persistently high inflation and interest rates and little progress on economic reforms.
- India represented one of the fastest growing markets for outbound travel in 2011. Increased holidaying and affordable international packages are encouraging India's rising middle class to make international trips. The World Tourism Organization has predicted that India will account for 50 million outbound tourists by 2020.
- Canada received more travellers from India in 2011, achieving 8.7% growth to 162,900 overnight arrivals.
- Total spending by travellers from this market grew 11.2% to \$160.9 million. On average, they spent 23 days in Canada, spending \$988 per person trip, lowest average spending among CTC's key markets.
- More than half of India visitors (54%) travelled to Canada for “visiting friends and relatives”, which was the highest VFR ratio among CTC's key markets
- Although three most popular activities while in Canada remained unchanged (visit friends and relatives, shopping and sightseeing), there was a growing interest in visit a historic site among Indian travellers.
- In 2011, Ontario was the most popular province capturing more than 60% of all visits, followed by British Columbia (18%) and Québec (10%).

*1 Source: Oxford Economics (as of July 9th, 2012)

*2 European Travel Monitor

*3 Australian Bureau of Statistics, Overseas Arrivals and Departures figures

*4 Japan National Tourism Organization

*5 Korea Tourism Organization

*6 Euromonitor International Ltd

*7 The China Tourism Academy (CTA)

CTC key international markets – travellers' characteristics

	Total International		Total CTC Key Markets		US					
		y/y %		y/y %	US	y/y %	US Leisure	y/y %	US Business	y/y %
Overnight Person-trips (000's)	15,575.7	-1.8%	13,945.9	-2.1%	11,470.7	-2.4%	9,713.5	-2.9%	1,757.2	1.0%
Overnight Travel Spending (\$M)	11,929.1	0.1%	9,686.1	-0.8%	6,101.3	-2.4%	4,612.5	-4.6%	1,488.8	4.9%
Average Party Size	1.8	-2.8%	1.8	-2.6%	1.9	-3.1%	2.1	-1.4%	1.3	-5.9%
Average Trip Duration (Nights)	7.7	1.9%	6.6	2.3%	4.1	1.2%	4.2	1.0%	3.4	2.7%
Average Spending per Trip (\$)	765.88	1.9%	694.6	1.3%	531.9	-0.1%	474.9	-1.7%	847.3	3.9%
Average Spending per Person-Night (\$)	99.6	0.1%	105.95	-0.9%	130.7	-1.3%	113.2	-2.8%	250.6	1.0%
Seasonality (%)										
1st. Quarter	13.4%	-0.5	13.4%	-0.4	13.1%	-0.2	11.4%	-0.2	22.5%	-0.5
2nd Quarter	27.1%	0.7	27.0%	0.7	27.0%	0.9	26.5%	0.7	29.8%	2.0
3rd Quarter	41.2%	-0.4	41.3%	-0.5	41.5%	-0.7	44.5%	-0.6	24.8%	-0.7
4th Quarter	18.3%	0.2	18.3%	0.1	18.4%	0.0	17.6%	0.1	22.8%	-0.7
Main Trip Purpose (%)										
Business	15.8%	0.6	15.3%	0.4	15.3%	0.5	0.0%	N/A	100%	N/A
VFR	27.6%	1.1	26.2%	1.2	24.7%	1.4	29.2%	1.9	0%	N/A
Pleasure	48.6%	-1.7	50.7%	-1.8	53.1%	-2.1	62.7%	-2.1	0%	N/A
Other	8.0%	0.0	7.8%	0.2	6.9%	0.2	8.1%	0.3	0%	N/A
Gender (%)										
Male	51.0%	0.5	51.1%	0.4	50.8%	0.2	47.7%	-0.3	68.1%	2.3
Female	49.0%	-0.5	48.9%	-0.4	49.2%	-0.2	52.3%	0.3	31.9%	-2.3
Age (%)										
24 & Under	13.3%	-0.3	13.1%	-0.3	12.3%	-0.2	13.8%	-0.3	3.9%	0.6
25-34	11.0%	0.2	10.1%	0.0	8.6%	-0.1	8.0%	-0.4	12.4%	1.3
35-44	17.8%	4.5	18.8%	6.0	23.5%	11.1	22.9%	11.5	25.6%	7.1
45-54	17.2%	-0.7	17.0%	-0.8	17.3%	-0.5	15.6%	-0.3	27.0%	-2.5
55+	39.1%	0.6	40.4%	0.8	42.2%	0.8	44.7%	1.3	28.0%	-1.4
Accommodation Types (000's Person-Trips)										
Hotel Only	6,408.2	2.5%	5,926.5	1.8%	5,110.1	0.9%	3,665.8	-0.2%	1,444.3	3.8%
Motel Only	771.7	-6.8%	751.2	-6.8%	703.2	-9.2%	634.4	-8.6%	68.8	-14.7%
Home of Friends or Relatives Only	3,563.5	2.5%	2,950.2	4.4%	2,253.0	6.5%	2,207.1	6.2%	45.9	22.4%

					US					
	Total International	y/y %	Total CTC Key Markets	y/y %	US	y/y %	US Leisure	y/y %	US Business	y/y %
Camping or Trailer Park Only	292.0	-15.3%	278.9	-15.3%	270.2	-14.3%	270.0	-13.8%	0.2	-90.9%
Cottage or Cabin Only	829.1	-8.6%	821.5	-8.3%	805.5	-8.8%	800.9	-8.7%	4.6	-14.8%
Other Only	925.3	-7.2%	842.9	-8.9%	669.4	-5.8%	615.0	-6.4%	54.3	1.3%
Hotel & Motel	187.5	-9.4%	175.4	-7.7%	144.5	-4.3%	131.3	1.8%	13.2	-40.0%
Other Combinations of Two or More Types	2,144.0	-4.9%	1,767.8		1,112.9	-9.1%	1,044.5	-9.3%	68.5	-6.7%
Activities (000's)										
Visit Friends or Relatives	6,683.9	-1.2%	5,630.6	-1.1%	4,189.1	-1.1%	3,979.3	-0.9%	209.8	-4.2%
Attend a Festival or Fair	1,396.4	-11.2%	1,207.5	-9.8%	895.2	-5.2%	833.8	-6.4%	61.4	15.6%
Attend Cultural Events	1,712.6	-11.8%	1,555.3	-10.7%	1,254.0	-11.0%	1,199.0	-8.9%	55.0	-40.7%
Visit a Zoo, Aquarium/Botanical Garden	2,108.4	-7.9%	1,801.6	-8.1%	1,257.5	-6.3%	1,206.8	-5.2%	50.7	-25.8%
Visit a Historic Site	4,532.2	-8.6%	3,934.2	-8.7%	2,924.9	-10.9%	2,684.5	-10.0%	240.5	-19.5%
Go Shopping	9,388.1	-5.2%	8,042.4	-5.5%	6,005.2	-6.0%	5,451.1	-4.8%	554.1	-16.0%
Go Sightseeing	8,152.4	-3.3%	6,965.2	-4.5%	5,051.7	-6.5%	4,605.8	-5.6%	445.9	-15.3%
Go to a Bar or Night Club	3,570.5	-6.1%	3,131.9	-7.1%	2,392.5	-8.3%	1,836.2	-9.6%	556.3	-3.7%
Visit a Museum or Art Gallery	3,503.1	-7.8%	3,030.2	-8.6%	2,162.4	-9.3%	1,989.7	-8.0%	172.7	-22.3%
Visit a National or State Nature Park	4,209.7	-9.6%	3,595.9	-8.5%	2,422.6	-8.2%	2,302.1	-7.8%	120.5	-16.6%
Participate in Sports/Outdoor Activities	3,879.2	-7.2%	3,558.8	-6.7%	2,842.0	-9.1%	2,719.9	-8.5%	122.1	-20.7%
Provinces Visited (000's)										
Newfoundland	82.7	-10.7%	73.1	-0.9%	53.3	-6.8%	43.3	-11.8%	10.0	22.0%
Prince Edward Island	158.4	-1.1%	153.5	2.0%	112.2	-3.8%	110.6	-2.4%	1.6	-51.5%
Nova Scotia	444.9	-4.6%	385.5	-0.5%	281.6	-8.5%	260.3	-9.4%	21.4	4.4%
New Brunswick	422.5	-6.1%	405.0	-4.0%	360.5	-5.6%	341.2	-4.7%	19.3	-19.2%
Quebec	2,923.8	2.8%	2,475.9	2.2%	1,786.5	-1.0%	1,459.9	-2.1%	326.5	3.9%
Ontario	7,312.3	-1.2%	6,507.8	-1.5%	5,515.9	-2.0%	4,662.0	-2.3%	853.9	-0.4%
Manitoba	281.9	1.1%	252.7	-1.0%	199.4	-6.9%	168.2	-2.4%	31.3	-25.1%
Saskatchewan	198.3	-3.1%	179.6	-3.7%	145.9	-0.4%	122.9	-2.0%	22.9	9.0%
Alberta	1,499.8	-1.4%	1,241.2	-2.6%	776.5	-4.5%	585.8	-5.1%	190.8	-2.6%
British Columbia	4,254.0	-2.5%	3,789.0	-2.5%	2,894.7	-2.1%	2,570.4	-3.0%	324.3	6.1%
Yukon	194.0	-14.2%	183.5	-14.1%	171.6	-8.3%	167.2	-6.9%	4.4	-42.1%
Northwest Territories	29.8	15.1%	27.6	19.9%	16.4	9.3%	12.9	16.2%	3.4	-10.5%
Total Province Visits	17,802.5	-1.3%	15,648.4	-1.6%	12,314.6	-2.5%	10,504.7	-3.0%	1,809.8	0.4%

	Core Markets							
	UK	y/y %	France	y/y %	Germany	y/y %	Australia	y/y %
Overnight Person-trips (000's)	622.7	-5.8%	421.8	3.4%	290.2	-8.0%	215.9	6.8%
Overnight Travel Spending (\$M)	791.6	-2.4%	537.7	2.0%	448.9	-5.8%	388.7	10.1%
Average Party Size	1.6	0.0%	1.6	0.6%	1.6	-0.6%	1.6	-3.0%
Average Trip Duration (Nights)	13.3	-1.3%	16.1	-1.2%	17.4	-0.2%	14.8	-1.2%
Average Spending per Trip (\$)	1,271.3	3.6%	1,274.6	-1.3%	1,546.7	2.5%	1,800.6	3.2%
Average Spending per Person-Night (\$)	95.5	4.9%	79.1	-0.1%	88.8	2.8%	121.9	4.4%
Seasonality (%)								
1st. Quarter	14.6%	-1.5	15.8%	-0.6	10.5%	-2.8	15.9%	0.9
2nd Quarter	29.4%	0.9	22.7%	-0.1	28.9%	0.9	31.4%	-0.2
3rd Quarter	38.2%	-0.9	44.7%	-0.2	46.3%	0.3	35.9%	4.3
4th Quarter	17.8%	1.5	16.7%	0.9	14.2%	1.5	16.7%	-5.2
Main Trip Purpose (%)								
Business	14.9%	2.4	10.3%	-2.6	19.8%	0.4	8.7%	-4.8
VFR	36.3%	-2.9	35.6%	1.6	23.0%	-4.1	27.0%	-1.6
Pleasure	41.2%	-1.5	48.4%	3.3	53.0%	4.7	59.4%	6.2
Other	7.7%	2.0	5.8%	-2.3	4.2%	-1.1	5.0%	0.1
Gender (%)								
Male	50.6%	3.3	50.7%	-0.9	54.8%	1.4	46.4%	-1.4
Female	49.4%	-3.3	49.3%	0.9	45.2%	-1.4	53.6%	1.4
Age (%)								
24 & Under	12.0%	-2.4	17.8%	-2.2	18.3%	0.1	15.5%	3.3
25-34	14.3%	0.0	17.4%	2.4	17.1%	0.8	15.0%	1.2
35-44	14.4%	0.8	13.8%	0.0	17.4%	4.0	8.3%	1.7
45-54	13.9%	-2.7	14.3%	-0.6	23.0%	-1.6	13.8%	-3.3
55+	43.3%	3.2	32.8%	-2.2	23.3%	-2.7	45.7%	-2.3
Accommodation Types (000's Person-Trips)								
Hotel Only	216.8	5.8%	95.5	11.3%	97.6	12.8%	73.0	-1.9%
Motel Only	6.0	-29.4%	4.1	-4.7%	7.5	11.9%	6.3	65.8%
Home of Friends or Relatives Only	187.7	-18.5%	127.6	8.0%	58.6	-4.2%	37.1	4.8%

	Core Markets							
	UK	y/y %	France	y/y %	Germany	y/y %	Australia	y/y %
Camping or Trailer Park Only	0.0	N/A	2.5	N/A	6.0	-50.8%	0.0	N/A
Cottage or Cabin Only	6.0	42.9%	4.5	246.2%	2.0	-9.1%	0.5	-64.3%
Other Only	20.0	-29.6%	22.6	-22.6%	17.0	15.6%	8.2	-18.0%
Hotel & Motel	9.2	73.6%	3.7	-72.8%	6.7	-32.3%	6.0	140.0%
Other Combinations of Two or More Types	167.1	3.2%	157.8	2.0%	93.3	-20.6%	80.9	19.5%
Activities (000's)								
Visit Friends or Relatives	373.3	-11.4%	281.2	4.4%	140.2	-8.2%	127.1	6.4%
Attend a Festival or Fair	71.3	-9.5%	62.1	-24.1%	38.0	-1.6%	33.5	-10.4%
Attend Cultural Events	65.9	-15.0%	83.9	7.4%	35.2	-8.1%	34.8	-15.9%
Visit a Zoo, Aquarium/Botanical Garden	110.0	-22.6%	133.1	8.5%	51.6	-18.7%	74.9	3.9%
Visit a Historic Site	253.4	-7.6%	214.4	1.2%	128.2	-15.4%	112.0	6.5%
Go Shopping	512.2	-10.6%	342.2	1.8%	226.5	-10.4%	193.9	10.2%
Go Sightseeing	470.2	-3.3%	324.6	15.6%	228.6	-7.6%	190.8	7.4%
Go to a Bar or Night Club	261.3	-4.1%	156.3	11.9%	85.4	7.3%	80.8	-5.4%
Visit a Museum or Art Gallery	197.1	-14.9%	205.5	5.3%	104.4	-5.0%	105.0	-3.4%
Visit a National or State Nature Park	289.6	-18.3%	217.8	3.1%	158.1	-18.8%	135.5	8.0%
Participate in Sports/Outdoor Activities	187.7	4.0%	155.7	21.5%	107.2	5.8%	89.1	-4.1%
Provinces Visited (000's)								
Newfoundland	12.3	32.3%	3.2	68.4%	1.9	-42.4%	1.4	75.0%
Prince Edward Island	8.4	33.3%	1.5	-81.0%	5.8	-13.4%	3.6	414.3%
Nova Scotia	38.6	68.6%	9.7	-34.9%	22.4	0.4%	8.8	282.6%
New Brunswick	12.7	6.7%	10.6	5.0%	9.1	7.1%	2.4	-4.0%
Quebec	98.9	14.3%	333.3	8.1%	77.0	25.0%	27.5	-16.4%
Ontario	278.9	1.9%	104.9	-5.9%	113.8	5.5%	68.7	11.3%
Manitoba	14.2	57.8%	1.9	-53.7%	9.9	2.1%	4.7	-23.0%
Saskatchewan	7.3	-46.3%	5.2	188.9%	4.9	-43.0%	2.3	-64.1%
Alberta	158.6	-2.2%	29.3	83.1%	75.2	-8.3%	59.9	1.0%
British Columbia	215.8	-6.5%	35.6	14.8%	101.9	-14.7%	136.9	8.7%
Yukon	N/A	N/A	0.2	-96.2%	4.8	-66.7%	3.5	84.2%
Northwest Territories	0.4	-50.0%	N/A	N/A	0.3	-82.4%	N/A	N/A
Total Province Visits	846.2	1.8%	535.4	4.3%	426.9	-4.3%	319.7	6.2%

	Emerging/ Transition Markets											
	Japan	y/y %	S Korea	y/y %	Mexico	y/y %	Brazil	y/y %	China	y/y %	India	y/y %
Overnight Person-trips (000's)	186.6	-13.4%	140.1	-11.0%	124.3	7.2%	74.1	3.9%	236.6	22.4%	162.9	8.7%
Overnight Travel Spending (\$M)	307.2	-6.9%	230.0	-10.4%	175.9	11.9%	136.1	1.5%	408.0	29.5%	160.9	11.2%
Average Party Size	1.4	3.7%	1.2	-0.8%	1.4	-0.7%	1.4	-13.9%	1.3	-1.5%	1.5	-1.3%
Average Trip Duration (Nights)	14.5	2.2%	27.6	2.8%	23.2	4.1%	19.4	0.3%	28.7	2.8%	22.8	5.3%
Average Spending per Trip (\$)	1,646.1	7.5%	1,642.0	0.7%	1,414.8	4.3%	1,836.8	-2.3%	1,724.1	5.7%	987.9	2.3%
Average Spending per Person-Night (\$)	113.9	5.1%	59.5	-2.0%	61.0	0.2%	94.6	-2.5%	60.0	2.9%	43.3	-2.9%
Seasonality (%)												
1st. Quarter	14.5%	-2.1	18.8%	1.0	16.3%	-1.4	14.7%	-4.4	14.4%	-1.4	13.3%	-1.2
2nd Quarter	19.9%	-4.7	28.7%	1.0	29.6%	2.5	25.6%	0.8	22.7%	-1.7	32.8%	-0.9
3rd Quarter	42.7%	5.8	35.0%	-1.5	38.1%	-0.3	40.5%	3.7	41.4%	1.9	34.6%	-0.1
4th Quarter	22.9%	1.0	17.5%	-0.6	16.1%	-0.7	19.0%	-0.3	21.6%	1.2	19.3%	2.1
Main Trip Purpose (%)												
Business	10.9%	0.4	17.8%	0.6	26.2%	3.6	12.6%	5.0	17.8%	-5.8	20.1%	-1.8
VFR	27.3%	5.7	33.8%	3.5	21.5%	-3.5	21.5%	-3.4	38.0%	3.9	54.3%	4.9
Pleasure	45.8%	-6.4	19.1%	3.4	25.6%	-1.8	36.4%	-3.8	17.2%	-0.6	19.1%	-1.5
Other	16.0%	0.1	29.3%	-7.6	26.7%	1.7	29.6%	2.3	27.0%	2.5	6.5%	-1.6
Gender (%)												
Male	43.3%	2.9	59.9%	-0.2	56.0%	1.2	42.6%	-8.3	59.7%	5.9	59.5%	-3.2
Female	56.7%	-2.9	40.1%	0.2	44.0%	-1.2	57.4%	8.3	40.3%	-5.9	40.5%	3.2
Age (%)												
24 & Under	19.1%	-0.8	27.9%	-2.9	27.0%	0.2	20.1%	-0.6	21.8%	2.0	9.6%	-1.0
25-34	17.7%	-3.5	22.6%	-1.2	17.8%	5.1	24.7%	7.7	16.4%	-2.4	16.5%	-0.1
35-44	12.2%	0.9	22.3%	2.6	21.5%	-2.0	8.8%	-10.4	21.4%	3.2	16.1%	-3.9
45-54	11.0%	-1.9	15.3%	2.1	18.3%	-2.2	18.5%	-1.0	15.0%	-4.4	18.0%	-2.8
55+	36.3%	4.0	10.3%	-1.2	14.6%	-1.4	24.3%	4.0	21.9%	0.3	36.5%	8.2
Accommodation Types (000's Person-Trips)												
Hotel Only	90.3	-14.1%	34.3	9.2%	52.5	22.4%	44.6	37.7%	73.3	29.7%	38.5	3.5%
Motel Only	7.5	141.9%	4.8	269.2%	3.5	1066.7%	0.5	66.7%	5.3	140.9%	2.5	316.7%
Home of Friends or Relatives Only	30.9	-19.3%	45.3	-17.8%	24.5	-8.9%	12.9	-14.0%	80.0	28.2%	92.6	36.4%

	Emerging/ Transition Markets											
	Japan	y/y %	S Korea	y/y %	Mexico	y/y %	Brazil	y/y %	China	y/y %	India	y/y %
Camping or Trailer Park Only	0.0	N/A	0.0	N/A	0.2	N/A	0.0	N/A	0.0	N/A	0.0	N/A
Cottage or Cabin Only	1.6	-20.0%	0.6	N/A	0.0	N/A	0.0	N/A	0.8	0.0%	0.0	N/A
Other Only	18.4	-25.2%	29.0	-24.7%	22.3	3.7%	5.7	11.8%	24.8	-26.0%	5.5	-38.2%
Hotel & Motel	4.7	4.4%	0.6	N/A	0.0	N/A	0.0	N/A	0.0	N/A	0.0	N/A
Other Combinations of Two or More Types	31.4	-16.9%	24.7	-19.0%	19.4	-10.6%	9.7	-33.6%	49.6	45.0%	21.0	4.5%
Activities (000's)												
Visit Friends or Relatives	76.0	-5.0%	84.0	-10.8%	55.3	-11.4%	27.0	-19.9%	151.0	24.6%	126.4	24.5%
Attend a Festival or Fair	22.2	-28.4%	22.8	-39.4%	22.6	-14.4%	6.3	-54.3%	16.1	-30.0%	17.4	-32.6%
Attend Cultural Events	15.1	-11.7%	15.3	-41.6%	22.0	4.3%	6.5	-44.4%	13.6	27.1%	9.0	-16.7%
Visit a Zoo, Aquarium/Botanical Garden	29.8	-39.7%	20.3	-44.2%	37.2	-2.9%	22.1	7.3%	44.6	-3.9%	20.5	-22.6%
Visit a Historic Site	56.8	7.8%	32.6	-8.4%	40.7	-11.5%	31.0	-7.2%	77.0	21.6%	63.2	24.9%
Go Shopping	158.4	-15.2%	122.8	-14.8%	101.7	2.9%	60.2	1.9%	193.7	11.6%	125.6	3.7%
Go Sightseeing	158.6	-12.9%	105.6	-15.5%	75.6	2.6%	52.0	-13.0%	185.6	31.5%	121.9	5.9%
Go to a Bar or Night Club	21.7	-41.4%	31.4	-28.1%	36.1	5.9%	28.5	-5.6%	20.6	-6.8%	17.3	3.0%
Visit a Museum or Art Gallery	52.8	-16.7%	37.9	-22.8%	40.8	-6.4%	38.0	-11.6%	55.0	-4.3%	31.3	12.2%
Visit a National or State Nature Park	91.7	-11.2%	48.4	-36.8%	52.6	-11.4%	34.5	4.5%	94.6	42.3%	50.5	-22.8%
Participate in Sports/Outdoor Activities	43.6	-3.3%	41.2	-27.0%	34.8	19.6%	18.9	3.3%	26.1	7.0%	12.5	12.6%
Provinces Visited (000's)												
Newfoundland	0.3	N/A	N/A	N/A	N/A	N/A	N/A	N/A	0.1	-91.7%	N/A	N/A
Prince Edward Island	7.9	-14.1%	N/A	N/A	0.2	100.0%	N/A	N/A	7.4	174.1%	0.9	N/A
Nova Scotia	3.1	-40.4%	0.8	166.7%	2.1	61.5%	2.8	64.7%	7.4	10.4%	2.4	33.3%
New Brunswick	1.5	66.7%	N/A	N/A	0.4	33.3%	0.2	-75.0%	6.1	45.2%	0.9	200.0%
Quebec	28.5	10.9%	9.2	41.5%	32.9	17.1%	23.6	-16.0%	40.7	29.6%	16.6	95.3%
Ontario	77.7	-15.4%	43.3	-24.6%	40.1	-7.6%	49.0	-10.7%	113.6	14.1%	102.2	34.8%
Manitoba	3.6	500.0%	2.2	100.0%	1.1	-42.1%	2.4	84.6%	4.9	-26.9%	2.7	285.7%
Saskatchewan	1.1	-26.7%	0.7	-61.1%	0.5	-16.7%	1.0	400.0%	5.4	68.8%	1.2	-47.8%
Alberta	49.9	-13.4%	30.4	-5.0%	9.3	52.5%	4.2	-19.2%	34.4	33.3%	12.4	-18.4%
British Columbia	86.6	-17.8%	87.0	-7.3%	55.4	3.4%	15.1	2.0%	129.7	19.4%	30.2	-36.6%
Yukon	1.1	266.7%	N/A	N/A	N/A	N/A	N/A	N/A	0.9	N/A	N/A	N/A
Northwest Territories	10.4	141.9%	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Total Province Visits	271.8	-10.2%	173.7	-10.4%	141.9	4.8%	98.3	-8.2%	350.5	20.8%	169.4	11.2%

Glossary

Tourism: As defined internationally, is “the activities of personstravelling to and staying in places outside their usual environment for not more than one year for leisure, business and other purposes”. In Canada, usual environment is defined as less than 80 kilometers one way away from home. Crossing an international boundary is considered tourism regardless of distance travelled. Exclusions are commuting, travel for education, travel by armed forces or diplomats, and migration.

Tourism Demand: The total spending by tourists (Canadian and non-resident visitors) on domestically produced commodities, includes all spending by same-day and overnight visitors. Tourism demand can be split into two components domestic demand, and international demand. Tourism *domestic demand* includes the expenditures associated with tourism activity in Canada by its residents. *International demand*, also called *tourism exports*, consists of the expenditures by non-residents in Canada on tourism. . It includes spending that may take place outside of Canada, for instance, the purchase of an airline ticket from a Canadian international carrier, to travel to Canada.

National Tourism Indicators (NTI)

The NTI were developed to provide timely quarterly updates to the main components of the Tourism Satellite Account (TSA), the yardstick that compares the tourism industry with all other industries in the national economy. The NTI can be used to support research on the trends, cycles and quarterly patterns in various tourism aspects or in the industry as a whole. Comparisons can be drawn with all other industries in the national economy.

Receipts represent spending by foreigners traveling in Canada, including education spending and medical spending.

Payments represent spending by Canadian residents traveling abroad, including education spending and medical spending.

The International Travel Account (ITA)

The ITA measures the difference between what Canadians spend abroad and what foreigners spend in Canada. This international travel account analysis is based on preliminary quarterly data that is seasonally unadjusted. Amounts are in Canadian dollars and are not adjusted for inflation. The ITA does not include airfares. Overseas countries are those other than the United States.

International Travel Survey (ITS)

Travel Characteristics - The ITS is an ongoing quarterly survey conducted by Statistics Canada that provides a wealth of data on international trip characteristics such as expenditures, activities, places visited and length of stay.

Volume of International Travellers - With the help of Canada Border Services Agency, all ports of entry across Canada participate in collecting monthly census counts of vehicles and passengers entering or re-entering Canada by country of residence and mode.