



Canadian Tourism
Commission

Commission canadienne
du tourisme

Canada

Tourism Snapshot

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



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Key highlights

- Total arrivals from CTC's international markets rose 3.6% in November 2013 on strength across all market segments, with arrivals from the Core markets (+4.6%), Emerging and Transition markets (+6%) and the US (+3.3%) all seeing gains.
- Buoyed by increased air capacity, overnight arrivals from Germany surged 16.6% in November 2013. Although arrivals from France fell 2%, the gains from Germany combined with those from the UK (+2%) and Australia (+9.7%) led the Core markets to a 4.6% gain overall.
- Overnight arrivals from the US rose 3.3% in November 2013. While air (+4.9%) and auto (+2.6%) arrivals expanded, those coming by other modes (-0.6%) declined. Year-to-date November 2013, overnight arrivals from the US are up 1.2% over 2012.
- Led by Mexico (+25.1%), China (+17.1%) and India (+16.5%), arrivals from CTC's Emerging and Transition markets expanded 6% in November. Arrivals from South Korea (-1.1%) and Japan (-2.2%) declined, while those from Brazil fell sharply (-29.1%) when compared with the surge of travel seen from this market in November 2012.
- In the first 11 months of 2013, overnight arrivals from CTC overseas markets increased 2.7%: Emerging and Transition markets (+7.4%), led by China (+22.2%), outperformed CTC's Core markets, which were unchanged compared with 2012.



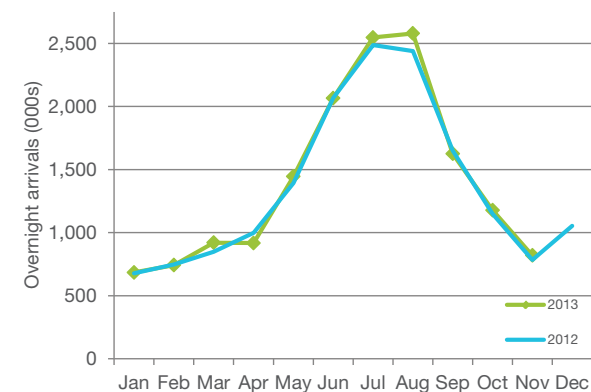
Tourism review Inbound highlights

Overnight trips to Canada

	Nov. 2013	13/12 Nov. % Change	Jan. - Nov. 2013	Year-to-date % Change
United States				
Automobile	357,926	2.6	6,464,967	-0.3
Plane	224,566	4.9	3,492,309	5.0
Other	33,796	-0.6	1,300,626	-1.4
US Total	616,288	3.3%	11,257,902	1.2%
Core Markets				
UK	25,947	2.0	601,482	-1.2
France	16,619	-2.0	429,045	0.6
Germany	12,119	16.6	296,904	-0.4
Australia	10,897	9.7	240,268	2.3
Core Total	65,582	4.6%	1,567,699	0.0%
Emerging/Transition Markets				
Japan	10,290	-2.2	211,681	-0.7
South Korea	6,684	-1.1	134,763	4.1
Mexico	6,894	25.1	138,855	5.8
Brazil	4,024	-29.1	84,705	0.3
China	16,664	17.1	329,034	22.2
India	7,598	16.5	136,149	-0.4
Emerging/Transition Markets Total	52,154	6.0%	1,035,187	7.4%
CTC Overseas Key Markets	117,736	5.2%	2,602,886	2.8%
Other Overseas Countries	84,847	3.9%	1,661,201	2.6%
Total Non-US Countries	202,583	4.7%	4,264,087	2.7%
Total Countries	818,871	3.6%	15,521,989	1.6%

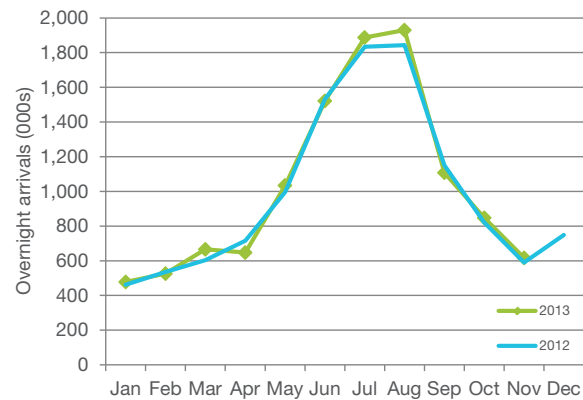
Note: Statistics Canada preliminary estimates.
Source: Statistics Canada, International Travel Survey.

International trips



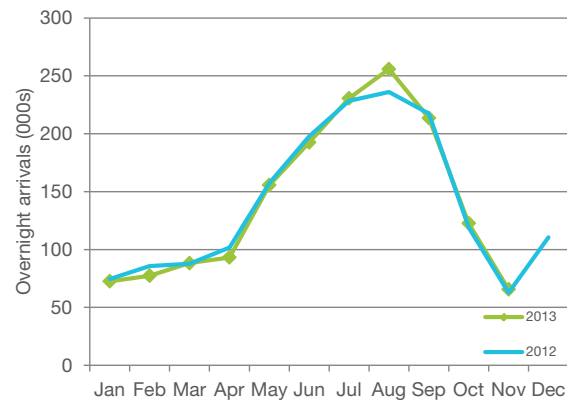
- Canada welcomed approximately 819,000 international visitors in November, an increase of 3.6% compared with the same month in 2012.
- Overnight arrivals from Germany (+16.6%), Australia (+9.7%) and the UK (+2%) rose in November, while those from France declined (-2%). The year-to-date number of overnight visitors from the Core markets is now 1,567,699, virtually unchanged from the same period the previous year.
- Total arrivals from CTC's Emerging and Transition markets (Japan, South Korea, Mexico, Brazil, China and India) rose 6% in November on strength from Mexico (+25.1%), China (+17.1%) and India (+16.5%). Year-to-date arrivals through November numbered 1,035,187, up 7.4% compared with the same period the previous year.

United States



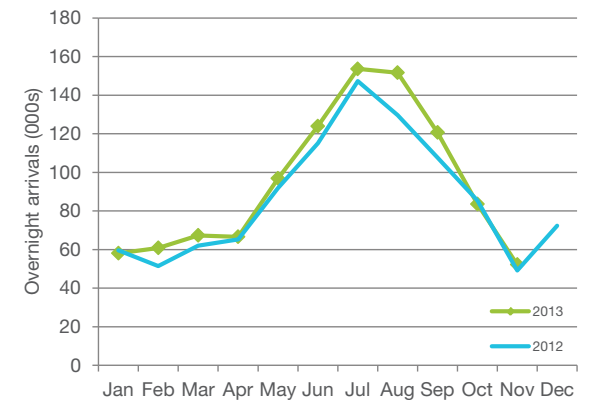
- Overnight visitation from the US rose 3.3% in November on strength from both auto (+2.6%) and air (+4.9%) arrivals. The number of travellers arriving by other means fell 0.6%.
- During the first 11 months of 2013, US residents took 11.3 million overnight trips to Canada, up 1.2% over the previous year. Overnight air arrivals (+5%) outperformed all other entry modes.
- In November, six provinces saw gains in the number of overnight US border-crossing arrivals. British Columbia (+7.7%), Quebec (+7.4%) and Newfoundland and Labrador (+7.4%) had the largest increases.

Core Markets



- Contrary to the decline seen in France (-2%), arrivals from Germany (+16.6%), Australia (+9.7%) and the UK (+2%) surged ahead in November.
- Arrivals from Germany (+16.6%) in November were boosted by increased air capacity on Lufthansa's services from Frankfurt to Toronto and Vancouver.
- For the first 11 months of 2013, arrivals from the UK (-1.2%) and Germany (-0.4%) remained below their 2012 levels, while France (+0.6%) and Australia (+2.3%) came out ahead.

Emerging Markets



- Led by Mexico (+25.1%), China (+17.1%) and India (+16.5%), arrivals from Emerging and Transition markets rose 6% in November over the same period the previous year.
- Arrivals from Japan (-2.2%) and South Korea (-1.1%) declined in November, while those from Brazil plunged 29.1% compared with the surge in travel from that market seen in November 2012, when they rose 64.8%. Arrivals from Brazil in November 2013 were nonetheless 16.8% above the level in November 2011.
- Year-to-date November 2013, overall arrivals from CTC's Emerging and Transition markets grew 7.4% compared with the previous year. The best performers were China (+22.2%), Mexico (+5.8%) and South Korea (+4.1%).

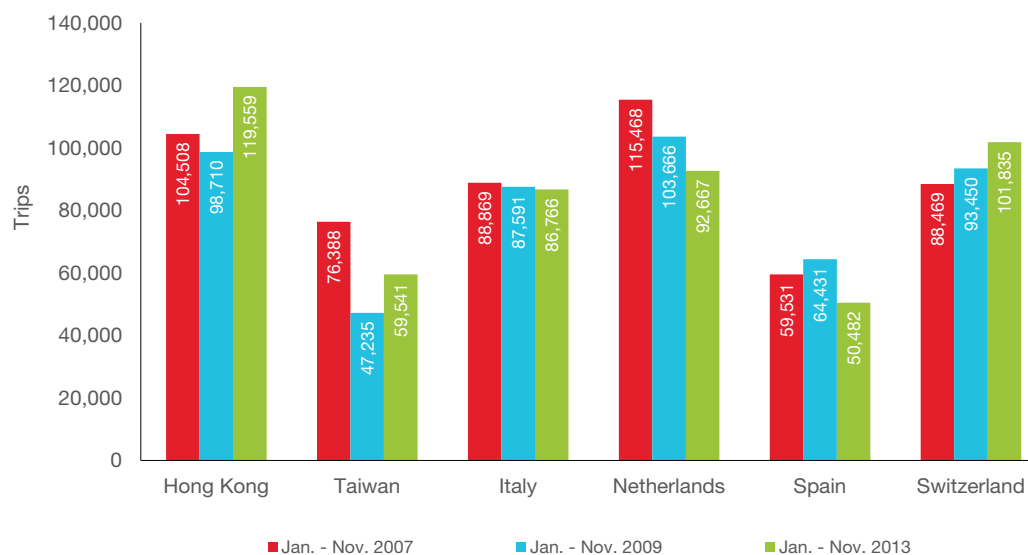
Market Watch

- Arrivals from other selected European markets were mixed in November: Netherlands (-0.3%) and Switzerland (-0.2%) declined, while those from Italy (+3.8%) and Spain (+13.2%) increased.
- In November, arrivals from Hong Kong (+16.8%) and Taiwan (+10.4%) expanded, building on previous gains.
- Year-to-date November 2013, arrivals from secondary markets were mixed: Hong Kong (+8.4%) and Taiwan (+17.9%) realized gains, while the European markets of Netherlands (-3.3%), Spain (-3.1%), Switzerland (-2%) and Italy (-0.9%) saw modest losses.
- When compared with the pre-recession year-to-date results for November 2007, Switzerland saw the largest gain in overnight arrivals (+15.1%), followed by Hong Kong (+14.4%). Taiwan and Netherlands posted significant declines, down 22.1% and 19.7% respectively.

Travel Characteristics Highlights (Q1-2013)

The International Travel Survey is currently going through a modernization initiative. We anticipate that the next release by Statistics Canada will be in Q1 2014.

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. 2013	13/12 Nov. % Change	Jan. - Nov. 2013	Year-to-date % Change
Italy	4,581	3.8	86,766	-0.9
Netherlands	3,627	-0.3	92,667	-3.3
Spain	2,265	13.2	50,482	-3.1
Switzerland	3,789	-0.2	101,835	-2.0
Hong Kong	6,293	16.8	119,559	8.4
Taiwan	2,553	10.4	59,541	17.9

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

Competitive review (January - October 2013)**

International Travel (in thousands)

Trips From:	Trips To:			
	Canada		Australia	
		13/12 Change		13/12 Change
Total International	14,703.1	1.5%	5,111.9	5.0%
United States	10,641.6	1.0%	396.7	5.1%
Canada	91.1	-1.5%
Core Markets				
United Kingdom	575.5	-1.3%	458.8	4.2%
France	412.4	0.7%	81.2	6.8%
Germany	284.8	-1.1%	124.8	4.2%
Australia	229.4	2.0%
Emerging/Transition Markets				
Japan	201.4	-0.7%	266.9	-6.9%
South Korea	128.1	4.4%	157.1	-1.1%
Mexico	132.0	5.0%
Brazil	80.7	2.5%	25.7	9.4%
China	312.4	22.5%	607.8	18.0%
India	128.6	-1.2%	134.8	9.5%
Total Key Markets	13,126.8	1.3%	2,344.9	5.9%

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Note: Statistics Canada preliminary figures.

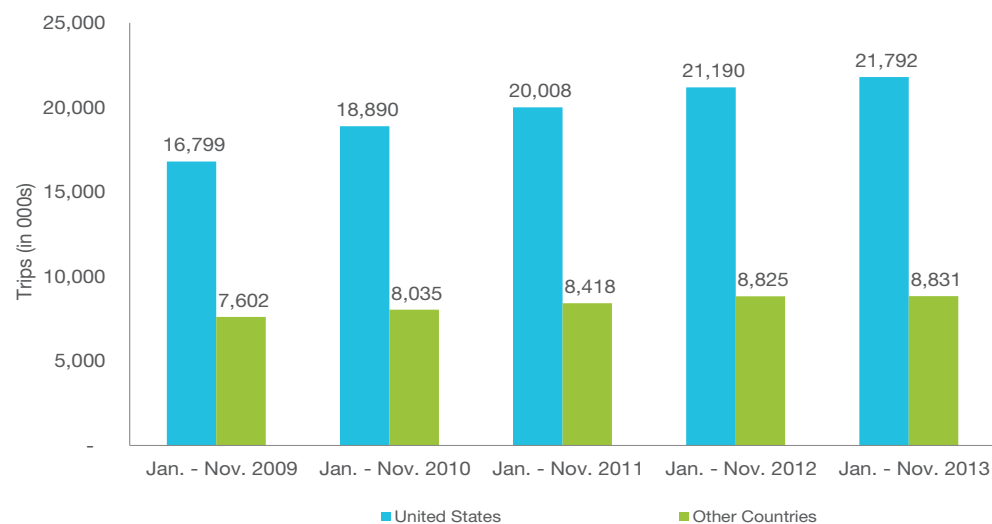
Sources: Statistics Canada; Tourism Australia.

** US visitation data for October 2013 was not available due to a delay of the change of entry process for US visitors.

- Year-to-date October 2013, Australia saw a 5% increase in arrivals and Canada saw a 1.5% increase over the same period the previous year.
- Both Australia (+18%) and Canada (+22.5%) saw arrivals from China expand during the first 10 months of 2013.
- Arrivals to Canada from both the UK (-1.3%) and Germany (-1.1%) declined, while arrivals to Australia from the UK (+4.2%) and Germany (+4.2%) increased. Arrivals from France to both Canada (+0.7%) and Australia (+6.8%) rose during the first 10 months of 2013.
- Australia experienced decreases in overnight arrivals from Japan (-6.9%) and South Korea (-1.1%), while Canada had mixed results, with a decline from Japan (-0.7%) and an increase from South Korea (+4.4%).

Canadian outbound trips

Overnight trips by Canadians



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

- In November 2013, Canadian outbound travel increased 1.3% compared with the same period the previous year to approximately 2.28 million trips.
- The number of Canadians visiting the US during the month of November fell 1.2% to 1.63 million. Canadian overnight travel to overseas destinations (excluding the US) rose 8.2% to 653,158 trips.
- For the first 11 months of 2013, outbound trips by Canadians increased 2% over 2012 to 30.6 million.
- In November, most Canadians re-entered the country from the US through Ontario (767,087 entries, -3.5%), British Columbia (352,773 entries, -1.1%) and Quebec (197,105 entries, +4.4%).
- Ontario recorded the largest re-entry of Canadians from overseas countries in November 2013 (312,449 entries, +6.2%), followed by Quebec (136,869 entries, +7.3%) and British Columbia (119,878 entries, +7.6%).

Overnight trips by Canadians

	Nov. 2013	13/12 Nov. % Change	Jan. - Nov. 2013	Year-to-date % Change
United States	1,629,435	-1.2	21,792,000	2.8
Other Countries	653,158	8.2	8,830,535	0.1
Total Trips from Canada	2,282,593	1.3	30,622,535	2.0

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

Consumer outlook

Consumer confidence

- **Canada:** The Index of Consumer Confidence decreased for a second consecutive month in November, this time by 1.8 points to 87.1 (2002 = 100). Canadians remain concerned about their financial situations and whether now is a good time to make a major purchase.
- **USA:** The Conference Board Consumer Confidence Index®, which had decreased sharply in October, declined again in November. The Index now stands at 70.4 (1985=100), down from 72.4 in October.

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

Accommodations

- In November 2013, the National Occupancy Rate rose to 60.2%, up 1.2 points compared with the previous year.
- Year-to-date November 2013, the National Occupancy Rate recorded a modest increase of 0.9 points to 64.2%. Eight provinces saw higher occupancy, with Northwest Territories registering the largest increase (+5.5 points), followed by Alberta (+2.3 points) and Newfoundland and Labrador (+2.1 points).
- For the first 11 months of 2013, the National Average Daily Rate improved to \$132.76, up 2.1% compared with the same period in 2012. Northwest Territories, British Columbia, Alberta, Quebec and Newfoundland and Labrador posted rates higher than the National Average Daily Rate.
- This year through the end of November 2013, the Average Revenue per Available Room (RevPAR) was \$85.20 (+3.5%), with Alberta posting the strongest growth (+7.4%, \$95.80) followed by Northwest Territories (+7.3%, \$107.94).

Canadian Occupancy Rates, By Province*

	Nov. 2013	13/12 Change [^]	Jan. - Nov. 2013	Year-to-date Change [^]
Alberta ¹	72.4	2.7	69.5	2.3
British Columbia	50.9	2.4	62.5	1.5
Saskatchewan	71.8	-0.8	68.9	-0.8
Manitoba	60.4	-7.8	62.0	-3.1
Ontario	61.4	0.3	63.7	0.6
Quebec	57.9	1.4	63.7	0.4
New Brunswick	54.3	3.5	57.2	0.6
Nova Scotia	56.8	0.5	60.9	-1.8
Newfoundland	71.4	1.5	73.3	2.1
Prince Edward Island	36.1	-0.2	48.8	0.1
Northwest Territories	66.1	0.0	70.2	5.5
Yukon	56.2	-5.5	66.4	-5.8
Canada	60.2	1.2	64.2	0.9

* Note: Based on the operating results of 220,062 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.