



# Tourism snapshot

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

January 2009

Volume 5, Issue 01

## Key highlights

International travellers made 695,285 overnight trips to Canada in January 2009, a decline of 3.0% over the previous year. Notable, are the large increases from China (21.9%) and Germany (19.3%).

Despite the depressed economic environment, overnight trips from India and Brazil both increased by 24.5%.

Following thirteen consecutive monthly declines, U.S. auto trips to Canada were up by 1.2%.

## Tourism review

### International trips

- Primarily driven by continued declines from the U.S. and Japan, overnight trips by international travellers posted a 3.0% decline in January 2009 compared to the previous year;
- This month, trips to Canada from both the Americas and overseas key markets decreased compared to January 2008, falling 3.4% and 7.6%, respectively;
- Overnight trips from overseas countries other than CTC key markets increased by 6.2% reaching 86,916 trips, while CTC's key overseas markets registered a decrease of 7.6%.

### United States

- Overnight trips from the U.S. fell 3.4% in January with trips by "other" modes experiencing the most significant drop of 22.6%, while plane trips fell by 6.7%. Automobile trips showed a slight increase of 1.2% over 2008 following thirteen consecutive declines;
- Despite the decrease in overall trips from the U.S., five provinces (Newfoundland, Québec, Manitoba, Saskatchewan and Alberta) registered increases, with Newfoundland registering the largest gain over last year of 218%.

### Mexico

- In January 2009, overnight trips from Mexico dropped 3.6% over 2008, with a total of 13,052 trips made to Canada.

## Overnight Trips To Canada

	January 2009	09/08 Jan % Change
<b>Americas*</b>		
<b>United States</b>		
Automobile	284,692	1.2
Plane	172,430	-6.7
Other	27,989	-22.6
<b>U.S. Total</b>	<b>485,111</b>	<b>-3.4</b>
Mexico	13,052	-3.6
<b>Americas Total</b>	<b>498,163</b>	<b>-3.4</b>
<b>Overseas Key Markets</b>		
France	18,400	-3.4
Germany	13,012	19.3
UK	33,587	-14.1
China	11,116	21.9
Japan	8,119	-25.6
South Korea	10,749	-20.6
Australia	15,223	-8.4
<b>Overseas Key Markets Total</b>	<b>110,206</b>	<b>-7.6</b>
<b>As % of Overseas and Americas</b>	<b>18.1</b>	
Other Overseas Countries	86,916	6.2
Non-US Countries	<b>210,174</b>	<b>-2.1</b>
<b>Total Countries</b>	<b>695,285</b>	<b>-3.0</b>

Note: Statistics Canada preliminary estimates.

Source: Statistics Canada, International Travel Survey.

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

## Overnight Trips by Canadians

	January 2008	January 2009	09/08 Jan % Change
United States	1,312,317	1,149,138	-12.4
Other Countries	934,710	1,001,328	7.1
<b>Total Trips from Canada</b>			

Note: Statistics Canada preliminary estimates.

Source: Statistics Canada, International Travel Survey.

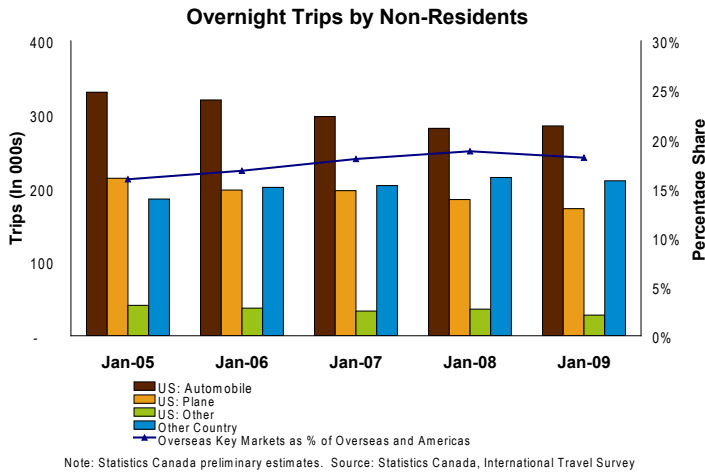
### Overseas key markets

- In January 2009, collectively, the overseas key markets posted a decrease, falling by 7.6% over the same month in 2008, for a total of 110,260 overnight trips made to Canada;
- For the month of January, significant increases in visitation were recorded from China and Germany of 21.9% and 19.3%, respectively, which were more than offset by decreases from Japan (25.6%), South Korea (20.6%) and the U.K. of (14.1%);
- Declines registered from Australia and France of 8.4% and 3.4%, also contributed to the negative performance of overseas key markets in January 2009.

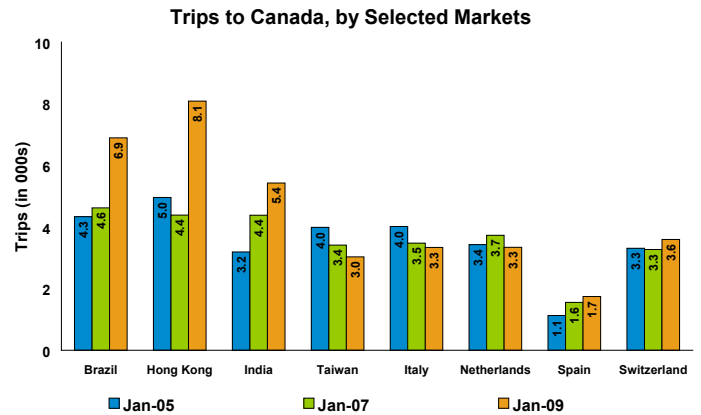
- Visitors from Asian key markets made just over 45,000 trips in January, accounting for 7.4% of total visitors from key markets;
- Overseas key markets have lost a small share to the U.S. in January, falling from 18.8% in 2008 to 18.1%.

### Market watch

- Canada experienced an 84% increase in trips from Hong Kong in January 2009 over the same month in 2007, with Brazil capturing the 2nd highest growth of 49%;
- Trips from Taiwan, the Netherlands and Italy declined relative to January 2007 levels, experiencing an 11%, 10% and 4% drop and a 24%, 2% and 17% decrease over January 2005, respectively;
- Trips from both Spain and Switzerland saw more moderate growth compared to January 2007 of 12% and 10%, while Canada saw a more significant increase from India of 24% over 2007 and 70% over 2005.



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



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

### Share of entry

- Canada received 485,111 overnight U.S. visitors in January, which accounted for 79.7% of total visitors from core markets. Of these U.S. visitors, 46.8% travelled by automobile, 28.3% by plane, while 4.6% used "other" modes of transportation;
- Americas (the U.S. and Mexico) accounted for 81.9% of total visitors from core markets with Mexico having a share of 2.1%;
- In January, overnight visitors from key European markets made 65,000 trips to Canada, accounting for 10.7% of total core market trips. Of all core market trips, the U.K. accounted for the largest portion at 5.5%, followed by France at 3.0% and Germany at 2.1%;

### Accommodations

- Please note that accommodation figures will be available in the February 2009 Tourism Snapshot and subsequent issues.

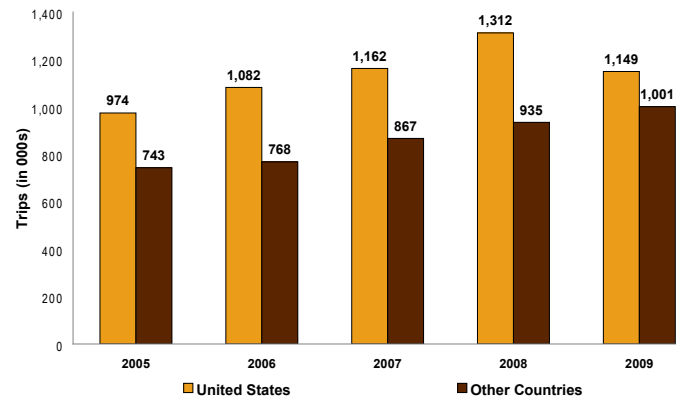
### Strategic performance

- Please note that the strategic performance figures will be posted in the Q1 2009 Tourism Snapshot and subsequent issues.

## Canadian outbound trips

- In January 2009, overall outbound trips by Canadians posted a decrease of 4% over the same period last year;
- Trips to the U.S. were down 12% in January, while an increase of 7% recorded to non-U.S. outbound destinations in January compared to the same month last year;
- Overall, there were a total of ten provinces/territories that experienced decreases compared to January 2008, with the Yukon recording the most significant decrease of 43%, and the only gains recorded from Newfoundland up 117% and Saskatchewan up 3% over last year;
- To non-U.S. countries, all reported provinces showed positive trip growth, with overall trips from Canada up 7.1% over last January;
- In total, outbound travel from Newfoundland saw the most significant increase of 102% compared with the same month last year, while Prince Edward Island experienced the most notable decline of 33%.

Outbound Trips by Canadians (in 000s)



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

## Consumer outlook

### Consumer confidence

**CANADA:** Consumer confidence held steady in January 2009 after the index fell for the 3rd consecutive month in December to 67.7 (2002=100).

**UNITED STATES:** The Conference Board reported that Consumer confidence moderately decreased in January 2009 to 37.4 compared to last month when the index stood at 38 (1985=100). This marks a new all time low for the index.

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

## Competitive review (November 2008)

- International trips to the U.S. totalled 46.6 million for the January through November 2008 period, a 6.9% increase over the year prior, while Australia experienced a 1% decrease in visitation, with just under 5 million travellers;
- Canada faced the most significant decrease in visitation over the previous year, experiencing a 4.8% drop, receiving a total of 16 million travellers in the January to November 2008 period;
- Of the three destinations, the U.S. outperformed both Canada and Australia in terms of market growth with France up by 26.2%, Germany by 18.2%, China by 17.8%, and the U.K. up 3%. The U.S. also experienced less severe decreases with Japan down by 7.6% and South Korea down by 4.7% compared to Canadian and Australian markets;
- Canada experienced stronger growth in trips from Mexico, with trip growth of 9.4%, while the U.S. experienced a 6.8% decrease. Trips from Australia to Canada grew 10.4% compared the year prior, while the U.S. was up 4.1%.

### International Travel, January-November 2008 (In 000s)

Trips From:	Trips To:					
	Canada		United States		Australia	
	#	08/07 Change	#	08/07 Change	#	08/07 Change
Total International	16,047	-4.8%	46,592	6.9%	4,971	-1.0%
<b>Americas</b>						
United States	11,700	-7.1%	...	...	409	-1.0%
Mexico <sup>1</sup>	248	9.4%	5,508	-6.8%	...	...
<b>Other Key Markets</b>						
France	396	13.4%	1,149	26.2%	76	16.0%
Germany	305	4.1%	1,656	18.2%	142	5.0%
United Kingdom	801	-5.5%	4,209	3.0%	571	-3.0%
China <sup>2</sup>	149	5.2%	590	17.8%	325	-1.0%
Japan	263	-16.7%	2,999	-7.6%	420	-20.0%
South Korea	174	-6.4%	708	-4.7%	202	-13.0%
Australia	219	10.4%	625	4.1%	...	...
Canada	...	...	17,847	7.9%	110	10.0%
<b>Total Key Markets</b>	<b>14,254</b>	<b>-6.2%</b>	<b>35,291</b>	<b>4.0%</b>	<b>2,040</b>	<b>-5.3%</b>

...Not available or data not applicable.

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

<sup>2</sup>US figures for China includes Hong Kong, SAR.

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

Note: Statistics Canada preliminary figures.

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