



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 woman with short brown hair, wearing a dark jacket, is smiling and looking back over her right shoulder. She is standing on a city street at night, with blurred lights from buildings and street lamps in the background. A man is visible in the background, slightly out of focus.

Key highlights

Year-to-date November 2010, with the exception of Mexico, all other CTC target markets posted gains.

Overnight travel to Canada from the US increased by 6.7% in November 2010, representing the largest monthly increase in US overnight trips for the calendar year. This rise was largely driven by a 14.5% surge in air travel to Canada over November 2009.

In November 2010, Brazil once again posted the strongest growth (+37.9%) among CTC key markets, followed by double-digit growth in China (+22.5%), South Korea (+15.6%), India (+12.5%) and Mexico (+11.4%).

Tourism review **Inbound highlights**

Overnight trips to Canada

	Nov. 2010	10/09 Nov. % Change	Jan.-Nov. 2010	Year-to-date % Change
Americas*				
United States				
Automobile	329,734	2.0	6,495,345	-2.0
Plane	229,007	14.5	3,203,274	5.9
Other	30,811	6.2	1,328,566	1.7
US Total	589,552	6.7	11,027,185	0.6
Mexico	4,171	11.4	111,170	-31.1
Americas Total	593,723	6.8%	11,138,355	0.2%
Overseas Key Markets				
France	15,417	8.1	408,494	6.8
Germany	9,363	-5.9	318,585	7.9
UK	26,430	0.3	668,882	0.9
China	10,866	22.5	182,780	21.4
Japan	10,097	-13.7	223,555	20.3
South Korea	6,994	15.6	153,031	19.5
Australia	9,756	2.0	210,518	12.6
India**	5,676	12.5	119,620	17.9
Brazil**	3,463	37.9	72,264	29.9
Overseas Key Markets	98,062	4.0%	2,357,729	9.7%
As % of Overseas and Americas	14.2%		17.5%	
Other Overseas Countries	76,856	5.6%	1,600,584	7.1%
Non-US Countries	179,089	4.8%	4,069,483	7.0%
Total Countries	768,641	6.3%	15,096,668	2.3%

Note: Statistics Canada preliminary estimates.

Source: Statistics Canada, *International Travel Survey*.

*Refers to the CTC's marketing group in the US and Mexico.

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

International trips

- Total overnight trips to Canada increased for a sixth consecutive month: 768,641 visitors in November 2010 registering a 6.3% increase over the previous year;
- In November, trips from the Americas markets (the US and Mexico) grew by 6.8%, reaching 593,723, with both countries performing strongly;
- Year-to-date November, CTC key markets delivered 13.5 million visitors a moderate 1.7% increase on the same period in 2009. However when compared against 2008, there has been a 6.8% decline in the volume of overnight visitors from CTC key markets;
- Year-to-date November, number of overnight trips to Canada from overseas countries other than CTC key markets grew by 7.1% compared with the same period in 2009.

United States

- In November, overnight travel to Canada from the US increased by 6.7%, representing the largest monthly increase in US overnight trips for the calendar year. Overall, travel to Canada from the US has moderately improved (+0.6%) for 2010;
- This month, trips by plane posted a notable 14.5% increase over 2009, along with a 6.2% gain in “other” modes of travel and a 2.0% increase in auto travel;
- In November, British Columbia reported a strong 10.9% increase in US visitors reaching 122,427. Quebec, Ontario and Alberta also saw gains of 7.9%, 6.4%, 6.1% respectively.

Mexico

- For a second consecutive month, arrivals from Mexico rose, this time up 11.4% compared with November 2009;
- In the first 11 months of 2010, travel from Mexico contracted 31.1%, falling to 111,170 overnight trips.

Overseas key markets

- Year-to-date November 2010, all CTC target markets posted gains, with the exception of Mexico;
- In November 2010, Brazil again posted the strongest growth (+37.9%) among CTC key markets, followed by double-digit growth in China (+22.5%), South Korea (+15.6%), and India (+12.5%);
- After posting positive growth for the majority of 2010, overnight trip volumes from Japan took a 13.7% dip in November;
- In November, Yukon (+151.1%), Saskatchewan (+109.9%) and Manitoba (+22.6%) posted the strongest growth in arrivals from countries other than the US, over 2009;
- Year-to-date November, British Columbia posted the strongest increase in overnight trip volumes, reaching 1.3 million (up 8.9%). Ontario, Quebec and Alberta also posted gains of 6.6%, 6.5% and 1.5% respectively.

Travel Characteristics Highlights (Q2-2010)

Overnight Trips to Canada

	Trips '000	10/09 Q2 %	Spend \$M	10/09 Q2 %	Average Trip Duration	10/09 Q2 %	Average Spend per Trip	10/09 Q2 %	Average Spend per Night	10/09 Q2 %
United States Leisure										
Automobile	1,670	-4.9%	624.8	-3.4%	3.7	-7.0%	374	1.6%	100	9.3%
Plane	539	4.0%	392.7	1.8%	5.4	-2.9%	728	-2.1%	135	0.8%
Other	381	0.0%	149.6	0.0%	2.8	0.0%	392	0.0%	138	0.0%
U.S. Leisure Total	2,576	-3.0%	1,164	-1.5%	4.0	-4.5%	452	1.5%	114	6.3%
Total U.S. MC & IT	487	1.7%	435	7.0%	3.5	4.1%	893	5.3%	253	1.1%
Total U.S.	3,063	-2.3%	1,599	0.7%	3.9	-3.4%	522	3.0%	134	6.7%
Mexico	32	-42.7%	37	-50.7%	20.7	-5.8%	1165	-14.0%	56	-8.6%
Americas Total	3,095	-3.0%	1,635.6	-1.6%	4.1	-6.4%	529	1.4%	130	8.3%
Overseas Key Markets										
United Kingdom	188.8	-1.7%	242.6	-9.7%	12.3	-4.0%	1,285	-8.2%	104	-4.4%
France	93.1	5.1%	110.0	0.4%	14.6	-4.3%	1,325	7.1%	81	-0.1%
Germany	88.3	18.4%	123.7	8.2%	14.6	-6.0%	1,520	-0.8%	96	-2.8%
Japan	52.4	35.1%	84.3	34.9%	14.0	-0.1%	1,491	-7.4%	115	-0.1%
South Korea	43.5	33.8%	63.7	26.0%	21.6	-5.0%	1,465	-5.9%	68	-1.0%
China	47.5	17.9%	65.9	26.7%	27.9	-8.8%	1,634	26.6%	43	2.1%
Australia	63.8	18.8%	100.7	27.7%	10.8	7.2%	1,578	7.4%	146	0.2%
India	50.6	19.9%	43.1	15.7%	22.7	-2.9%	851	-3.5%	37	-0.6%
Brazil	17.6	23.9%	28.2	24.8%	13.6	14.3%	1,719	7.9%	118	-11.9%
Total Overseas Key Markets	646	11.9%	862.1	8.3%	15.9	-0.2%	1,335	-3.2%	84	-3.0%

Source: Statistics Canada, International Travel Survey, preliminary estimates

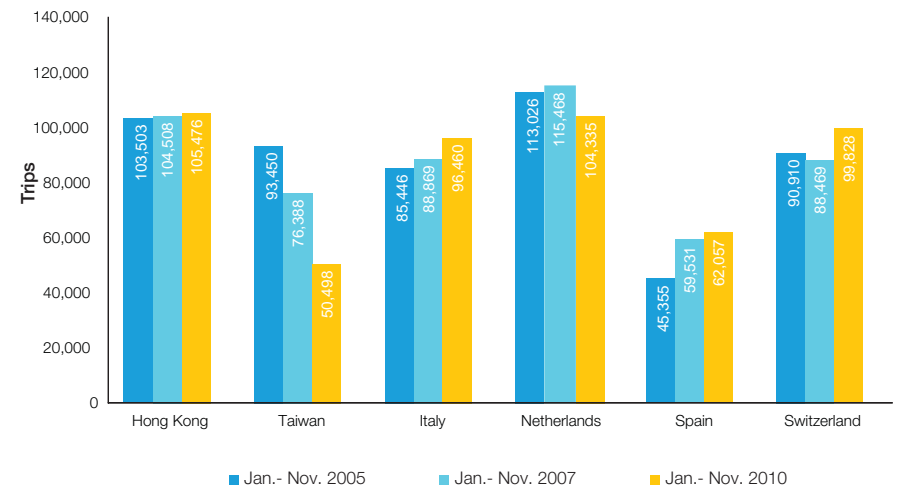
- In Q2 2010, US spending kept a moderate pace, strengthening by 0.7% to reach \$1.6 billion. There were also increases in the average spend per night and the average spend per trip 6.7% and 3.0% respectively;
- The British pound depreciated 15.2% against the Canadian dollar during the second quarter relative to Q2 2009. While the number of British tourists declined by 1.7% over April to June 2010, spending decreased by a significant 9.7%, along with the average duration of their trip (4.0%). However, a different story emerges when spending is converted into British pounds, revealing total overnight travel spending in Canada increasing by 6.4%, along with the average spend per trip (+8.3%) and spend per night (+12.7%);

- In Q2 2010, Australia reported the highest total spend among CTC Asia-Pacific markets: a total of \$100.7 million equated to a 27.7% jump. However, when the appreciation of the Australian dollar against the Canadian dollar is taken into account, this increase only moderately reduces to 24.7%.

Market Watch

- For year-to-date November, four of the six selected secondary markets posted increases in overnight trip volumes over 2005;
- Compared with January to November 2005, Spain posted the highest increase (+36.8%) in overnight visitor arrivals to Canada, reaching 62,057 trips;
- Despite Taiwan posting a year-to-date November increase of 6.9% in overnight arrivals to Canada in 2010, Taiwan has seen a significant 40.9% decline compared with the same period in 2005.

Overnight trips to Canada, by selected markets



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

Competitive review (October 2010)

International Travel, January–October 2010

Trips From:	Trips To:					
	Canada		United States		Australia	
	#	10/09 Change	#	10/09 Change	#	10/09 Change
Total International	14,328	2%	50,421	11%	4,691	5%
Americas						
United States	10,438	0%	...	...	380	-1%
Mexico ¹	107	-32%	11,064	9%	...	...
Overseas Key Markets						
France	393	7%	1,153	11%	78	8%
Germany	309	8%	1,493	3%	126	1%
United Kingdom	642	1%	3,293	-1%	477	-5%
China ²	172	21%	689	55%	370	22%
Japan	213	23%	2,847	18%	330	13%
South Korea	146	20%	934	52%	175	19%
Australia	201	13%	749	26%	...	...
India	114	18%	578	19%	112	9%
Brazil	69	30%	955	36%	21	4%
Canada	...	...	17,190	11%	96	-1%
Total Key Markets	12,804	1%	40,946	20%	2,142	18%

...Not applicable or data not available.

¹ US figures for Mexico include arrivals to interior only.

² US figures for China includes Hong Kong, SAR.

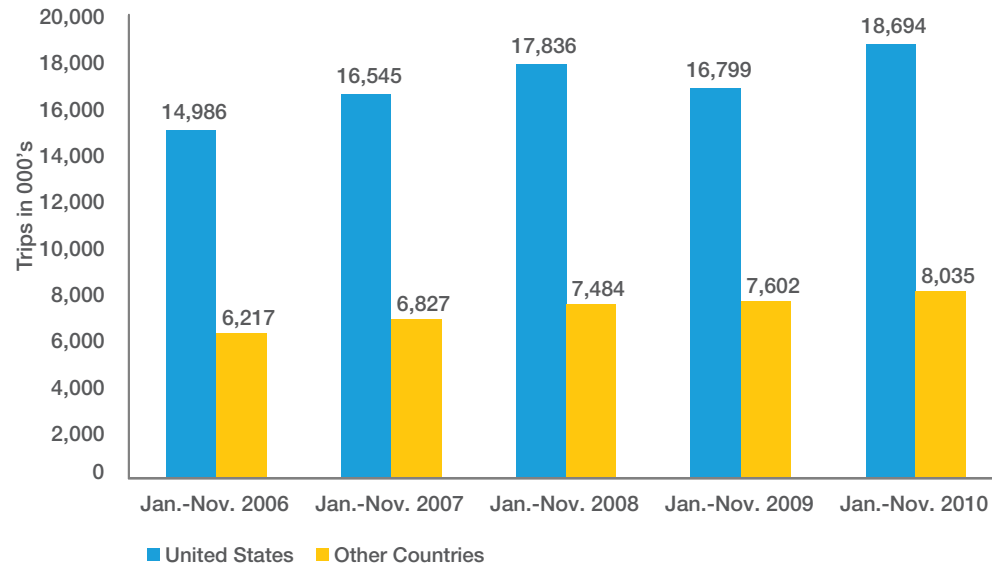
Sources: Statistics Canada; Tourism Australia; and ITA, and Office of Travel and Tourism Industries (USA).

Note: Statistics Canada preliminary figures.

- Year-to-date October 2010, Canada saw moderate growth (+2%) in visitor arrivals while the US and Australia posted stronger growth of 11% and 5% respectively;
- From January to October 2010, all three markets reported strong growth in arrivals from China, with the US posting a 55% increase, followed by Australia and Canada with gains of 22% and 21% respectively;
- Canada took the lead in Japanese arrivals, up 23% in the first 10 months of 2010, followed by the US (+18%) and Australia (+13%);
- Both the US and Canada reported a similar surge in arrivals from Brazil, with the US posting a 36% gain and Canada seeing a 30% increase.

Canadian outbound trips

Overnight trips by Canadians



- Canadian outbound travel to the US increased 10.0% in November 2010 over 2009, with travel to non-US destinations also improving by 13.2%;
- In November, all provinces/territories expect for New Brunswick and Newfoundland and Labrador saw increases in travel to destinations other than the US, with Saskatchewan, Yukon, and Manitoba posting the strongest gains of 377.5%, 266.7% and 64.0% respectively;
- Year-to-date November 2010, Saskatchewan (+24.2%), Manitoba (+19.8%) and New Brunswick (+17.5%) saw the greatest increases in the number of residents visiting the US.

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

Overnight trips by Canadians

	Nov. 2010	10/09 Nov. % Change	Jan.-Nov. 2010	Year-to-date % Change
United States	1,504,107	10.0	18,693,718	11.3
Other Countries	574,110	13.2	8,035,231	5.7
Total Trips from Canada	2,078,217	10.9	26,728,949	9.5

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

Consumer outlook

Consumer confidence

- **Canada:** The Index of Consumer Confidence rose 3.9 points to 83.6 (2002 = 100) this month. It was the second consecutive monthly increase, and together they were sufficient to offset the declines recorded between July and September.
- **USA:** The Conference Board Consumer Confidence Index®, which had improved in October, increased further in November. The Index now stands at 54.1 (1985=100), up from 49.9 in October.

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

Accommodations

Canadian occupancy rates, by province*

	November 2010	10/09 Change^	Jan.- Nov. 2010	Year-to-date Change^
Alberta ¹	63.8	5.4	59.5	-0.9
British Columbia	49.2	0.9	61.9	1.6
Saskatchewan	76.0	2.7	70.9	0.0
Manitoba	67.8	5.0	66.4	1.2
Ontario	60.3	4.6	61.9	3.3
Quebec	57.4	6.2	61.8	3.4
New Brunswick	55.8	4.2	57.7	0.9
Nova Scotia	53.0	1.1	62.3	1.6
Newfoundland	67.3	6.2	69.7	3.0
Prince Edward Island	41.0	-0.3	49.2	-0.4
Northwest Territories	63.3	0.5	60.7	-0.8
Yukon	63.8	-3.6	75.1	3.7
Canada	58.0	3.8	61.7	2.0

* Note: Based on the operating results of 215,669 rooms (unweighted data).

^ Percentage points.

¹ Excluding Alberta resorts.

Source: PKF Consulting Inc.

- Year-to-date, the national occupancy rate increased by 2.0 percentage points after experiencing an increase of 3.8 percentage points in November 2010 and a 2.5 point increase in October. While most provinces/territories posted increases in November occupancies, Yukon (-3.6) and Prince Edward Island (-0.3) saw declines;
- The average daily rate (ADR) increased by 1.7% over November 2009 to \$121.07. The Northwest Territories posted the highest ADR of \$154.32, following by Quebec and Alberta;
- Revenue per available room increased by 8.8% to \$70.27 in November 2010 compared with \$64.57 in November 2009.
- For the first 11 months of 2010, properties with over 500 rooms posted the highest occupancy rate (70.4%), while properties under 50 rooms posted the lowest occupancy rate of 50.2%.

Strategic performance

Travel Volumes, January-November 2010

	Target	Actual	% Difference
United States	11,002	11,027	0.2
Mexico	117	111	-4.7
Americas (Total)	11,119	11,138	0.2
France	376	408	8.5
Germany	300	319	6.1
UK	659	669	1.5
China	156	183	17.3
Japan	208	224	7.3
S Korea	130	153	18.0
Australia	185	211	13.7
India	123	120	-2.5
Brazil	58	72	25.4
Overseas Key Markets (Total)	2,195	2,358	7.4
Total	13,314	13,496	1.4

* Note: As per strategic plans.

- Year-to-date November, international trips by key markets exceeded CTC's set targets by 182,000 (+1.4%);
- Year-to-date, trips from Brazil, South Korea, China and Australia outperformed CTC targets by +25.4%, +18.0%, +17.3%, and +13.7% respectively;
- Mexico and India's markets fell short of CTC's set targets by 4.7% and 2.5% respectively.

CTC Market Research & Evaluation