



# Tourism Snapshot

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





## Key highlights

In the first two months of 2011 overnight arrivals to Canada fell 4.1% to 1.3 million trips over the same period in 2010. This is likely a reflection of the unusually high number of arrivals experienced during the February 2010 Winter Olympic Games.

This month, there was a notable decline in US overnight arrivals to Canada of 8.9%, this decline was largely driven by a 27.1% drop in US overnight arrivals to British Columbia, again linked to the provinces hosting of the 2010 Winter Olympic Games.

In February 2011, Germany posted the most notable double-digit decline in overnight arrivals to Canada (-26.0%) followed by Japan (-8.1%), the UK (-7.7%), Brazil (-6.3%) and South Korea (-5.1%).





# Tourism review Inbound highlights

## Overnight trips to Canada

	Feb. 2011	11/10 Feb. % Change	Jan.- Feb. 2011	Year-to-date % Change
<b>Americas*</b>				
United States				
Automobile	282,219	-9.3	523,939	-6.9
Plane	175,888	-7.0	356,384	0.1
Other	30,025	-15.5	59,691	-4.8
<b>US Total</b>	<b>488,132</b>	<b>-8.9</b>	<b>940,014</b>	<b>-4.2</b>
Mexico	5,359	3.7	11,712	2.9
<b>Americas Total</b>	<b>493,491</b>	<b>-8.8%</b>	<b>951,726</b>	<b>-4.1%</b>
<b>Overseas Key Markets</b>				
France	27,615	1.9	49,024	2.1
Germany	10,250	-26.0	21,147	-18.2
UK	32,144	-7.7	61,250	-8.4
China	10,751	5.0	24,025	20.6
Japan	11,792	-8.1	19,568	-8.9
South Korea	7,717	-5.1	18,660	2.7
Australia	9,676	0.3	25,344	11.9
India**	5,415	13.8	11,916	6.9
Brazil**	3,356	-6.3	11,283	10.4
<b>Overseas Key Markets</b>	<b>118,716</b>	<b>-5.0%</b>	<b>242,217</b>	<b>-0.9%</b>
<b>As % of Overseas and Americas</b>	<b>19.4%</b>		<b>20.3%</b>	
Other Overseas Countries	68,474	-22.3%	143,841	-9.2%
Non-US Countries	192,549	-11.8%	397,770	-4.0%
<b>Total Countries</b>	<b>680,681</b>	<b>-9.7%</b>	<b>1,337,784</b>	<b>-4.1%</b>

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

- In the second month of 2011, there was a 9.7% drop in the number of overnight visitor arrivals to Canada compared with the same period in 2010. This contributed to an overall 4.1% decline year-to-date, with the total number of overnight visitors falling to 1.3 million;
- Despite an improvement in the number of overnight arrivals from Mexico in February 2011, total trips from the Americas markets (the US and Mexico) declined by 8.8%, reaching 493,491 overnight visitors for the month;
- Overnight trips to Canada from countries other than CTC key markets contracted by 22.3%, totalling 68,474 in February 2011. The total of overnight visits from all countries excluding the US fell by 11.8% to 192,549.

## United States

- In February 2011, overnight travel to Canada from the US decreased by 8.9% after a moderate increase of 1.4% during January;
- This month, the number of US overnight arrivals from “other” modes of travel had the greatest decline (-15.5%), while overnight car trips and plane travel also fell by 9.3% and 7.0% respectively when compared with the same period in 2010;
- This month’s decline in US overnight arrivals to Canada was largely driven by a 27.1% drop in US overnight arrivals to British Columbia that is likely linked to the boost seen in arrivals during the 2010 Winter Olympic Games. This month, British Columbia welcomed a total of 134,816 overnight US visitors, a decline of 50,077 compared with the previous year.

## Mexico

- The number of overnight visitors from Mexico grew for a fifth consecutive month (+3.7%): 5,359 visitors for the month of February;
- Year-to-date February 2011, there has been a 2.9% increase in overnight visitor arrivals from Mexico, totalling 11,726.

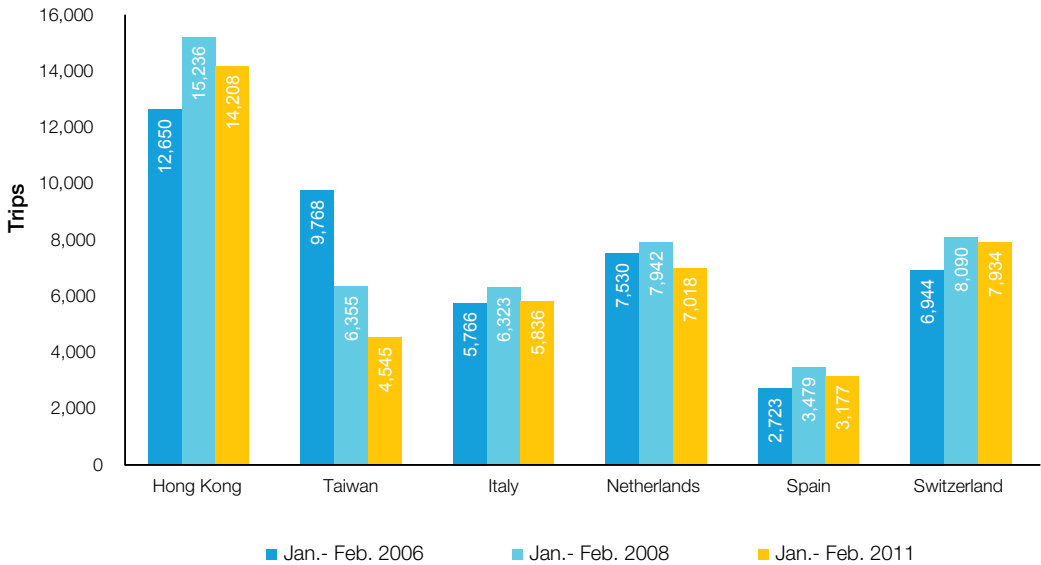
## Overseas key markets

- Overnight trip arrivals to Canada from CTC key overseas destinations declined by 5.0% in February 2011 over the same month last year, down from a 3.5% increase during the previous month;
- In February 2011, Germany posted the greatest monthly decline in overnight arrivals to Canada of 26.0% compared with the same month in 2010. This decline was driven by notable drops in German overnight arrivals to Alberta (-39.6%), British Columbia (-38.3%) and Ontario (-24.7%);
- This month, there was a 13.8% lift in overnight arrivals from India reaching 5,415 visitors. Year-to-date February, Indian overnight arrivals have improved by 6.9% compared with the same period in 2010;
- During the second month of 2011, Alberta and British Columbia saw declines in overnight international arrivals (from all destinations excluding the US) of 29.6% and 24.6% respectively. Ontario posted a far more moderate contraction in arrivals from countries other than the US (-1.1%) while Quebec saw arrivals from these destinations increase 6.7% when compared with February 2010.

### Market Watch

- Year-to-date February 2011, four of the six selected secondary markets posted increases in overnight trip volumes over 2006;
- Hong Kong represents the largest market, with a reported 14,208 overnight visitors during the first two months of 2011. Compared with the same period in 2006, there has been a 12.3% increase in overnight arrivals from Hong Kong;
- Overnight trips from Taiwan and the Netherlands declined relative to the first two months of 2006, down 21.2% and 6.8% respectively.

### Overnight trips to Canada, by selected markets



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

# Competitive review (December 2010)

## International Travel, January–December 2010 (in thousands)

Trips From:	Trips To:					
	Canada		United States		Australia	
		10/09 Change		10/09 Change		10/09 Change
<b>Total International</b>	16,093	2%	59,745	9%	5,885	5%
<b>Americas</b>						
United States	11,744	1%	...	...	472	-2%
Mexico <sup>1</sup>	120	-29%	13,423	2%	...	...
<b>Overseas Key Markets</b>						
France	435	7%	1,342	11%	97	4%
Germany	332	7%	1,726	2%	160	-1%
United Kingdom	712	0%	3,851	-1%	647	-3%
China <sup>2</sup>	195	21%	802	53%	454	24%
Japan	236	19%	3,386	16%	398	12%
South Korea	164	19%	1,108	49%	214	18%
Australia	233	14%	904	25%	...	...
India	128	18%	650	19%	139	11%
Brazil	80	30%	1,198	34%	27	5%
Canada	...	...	19,959	11%	122	-1%
<b>Total Key Markets</b>	<b>14,379</b>	<b>1%</b>	<b>48,349</b>	<b>9%</b>	<b>2,730</b>	<b>6%</b>

...Not applicable or data not available.

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

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

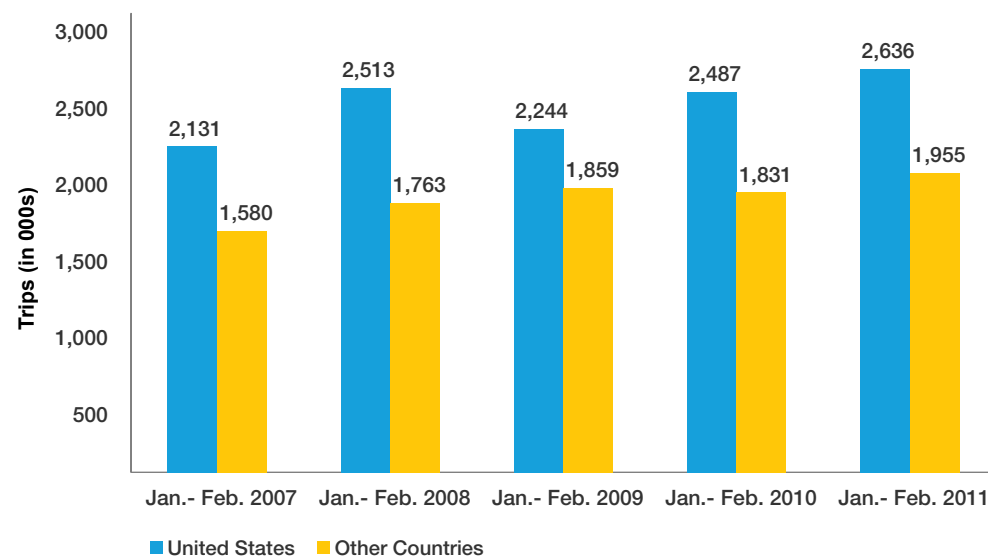
Note: Statistics Canada preliminary figures.

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

- Canada posted a 2% increase in its total number of overnight visitors over 2009. In comparison, the US and Australia also reported yearly gains of 9% and 5% respectively over the previous year;
- Year-to-date December 2010, Canada outperformed both the US and Australia in arrivals from Japan and Germany with year-over-year gains of 19% and 7% respectively. In addition, the number of UK overnight arrivals to Canada remained unchanged compared with 2009, while Australia and the US saw declines of 3% and 1% respectively;
- In 2010, Canada and the US reported similar double-digit growth in arrivals from Brazil and India. However, the US outperformed Canada in arrivals from South Korea with a 49% increase, while Canada posted year-over year growth of 19%;
- Canada's comparably slower growth in the total number of overnight visitors in 2010 was in part influenced by a 29% decline in arrivals from Mexico. In comparison, the US saw a 2% increase in Mexican visitation over the previous year.

# Canadian outbound trips

## Overnight trips by Canadians



- Canadian outbound travel to the US increased 6.3% in February over the same month in 2010, with travel to non-US destinations also improving by a similar 6.4%;
- In the first two months of 2011, Yukon reported the strongest increase in the total number of residents travelling to countries other than the US (+66.7%), followed by Nova Scotia (+58.2%) and Quebec (+14.8%);
- In February 2011, total overnight travel to the US by British Columbians increased by 9.5% while numbers of those travelling from Ontario and Quebec also saw gains of 6.7% and 4.1% respectively over the same month in 2010. In comparison, Alberta saw a 0.2% fall in the number of residents visiting the US, over February 2010.

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

## Overnight trips by Canadians

	Feb. 2011	11/10 Feb. % Change	Jan.- Feb. 2011	Year-to-date % Change
United States	1,258,761	6.3	2,636,034	6.0
Other Countries	888,450	6.4	1,955,445	6.8
<b>Total Trips from Canada</b>	<b>2,147,211</b>	<b>6.3</b>	<b>4,591,479</b>	<b>6.3</b>

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

# Consumer outlook

## Consumer confidence

- **Canada:** The Index of Consumer Confidence was largely unchanged this month, increasing by 1.2 points to 89.3 (2002 = 100).
- **USA:** The Conference Board Consumer Confidence Index®, which had increased in January, improved further in February. The Index now stands at 70.4(1985=100), up from 64.8 in January.

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

## Accommodations

- Please note at the time of publication we were unable to update Canada's Accommodations Table as a result of PKF Consulting Inc.'s Trends in the Canadian Hotel Industry national market report not being available.