



Tourism Snapshot

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



A photograph of three people walking through a forest. In the foreground, a man in a red jacket and blue jeans is walking towards the left. Behind him, a woman in a blue jacket and grey pants is walking towards the right. A third person is partially visible behind her. The ground is covered with large logs and driftwood. The background is a dense forest of evergreen trees under a clear sky.

Key highlights

In April 2011, overnight travel to Canada increased by 2.5%, partially driven by significant gains in arrivals from CTC key overseas markets (+6.3%)

The largest monthly gains by CTC key markets were in arrivals from Mexico (+28.2%), France (+24.8%) and China (+14.0%).

Spurred by a strong Canadian dollar, Canadian travel to the US grew by 8.8% in April and by 6.4% for the year.

Tourism review Inbound highlights

Overnight trips to Canada

	April 2011	11/10 April % Change	Jan.- April 2011	Year-to-date % Change
United States				
Automobile	414,472	1.1	1,239,008	-4.7
Plane	224,668	-0.4	805,132	0.6
Other	42,750	-3.8	135,828	-3.9
US Total	681,890	0.3	2,179,968	-2.7
Core Markets				
UK	46,504	5.4	140,470	-7.5
France	29,616	24.8	98,780	7.8
Germany	18,368	-1.4	51,945	-13.9
Australia	13,049	3.5	47,644	4.4
Core Total	107,537	8.5	338,839	-3.1
Emerging/ Transition Markets				
Japan	12,633	-12.9	43,386	-16.7
South Korea	9,485	-7.4	36,151	-5.1
Mexico	12,652	28.2	32,831	5.3
Brazil**	4,923	-3.7	21,051	12.6
China	12,719	14.0	47,608	15.8
India**	9,469	0.3	28,233	2.0
Emerging/ Transition Total	61,881	2.6	209,260	0.2
Overseas Key Markets	169,418	6.3	548,099	-1.8
Other Overseas Countries	112,545	11.2	341,267	-2.9
Non-US Countries	281,963	8.2	889,366	-2.3
Total Countries	963,853	2.5	3,069,334	-2.6

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

International trips

- In April, there were approximately 963,853 overnight visitors to Canada, a 2.5% increase compared with 2010. Year-to-date, April travel to Canada has fallen 2.6% to 3.1 million overnight visitors;
- Overall overnight arrivals from CTC Core Markets (the UK, France, Germany and Australia) grew by 8.5% in April 2011, lessening the year-to-date decline to 3.1% over the same period in 2010;
- Overnight trips to Canada from Emerging/ Transition markets (Japan, South Korea, Mexico, Brazil, China and India) rose a 2.6% to reach 61,881 trips. In the first four months of 2011, total overnight arrivals from Emerging/ Transition markets grew by 0.2% over 2010;
- During the first four months of 2011, only four provinces posted gains in total overnight inbound trips. Prince Edward Island posted the greatest increase at 44.4%, followed by Saskatchewan (+6.2%), Québec (+3.3%) and Ontario (+0.7%).

United States

- In April 2011, overnight travel from the US, Canada's largest inbound market, improved by 0.3% to reach 681,890 trips;
- This month, the number of US overnight arrivals by auto improved by 1.1% to 414,472 trips, while air and "other" modes of travel fell by 0.4% and 3.8% respectively;
- In April 2011, British Columbia (+3.2%) and Québec (+1.4%) saw increases in overnight trips from the US, while Alberta (-2.9%) and Ontario (-1.3%) had declines over 2010;
- In the first four months of 2011, Newfoundland and Labrador (+45.0%) posted the most significant increase in overnight arrivals from the US, followed by Nova Scotia (+8.3%), Saskatchewan (+5.3%) and Québec (+0.3%).

Core Markets

- In April 2011, the majority of Core Markets rebounded, with the exception of Germany who saw the number of overnight arrivals into Canada fall by 1.4%;
- For the 12th consecutive month, France reported an increase in arrivals to Canada, this time up 24.8% to 29,616 visitors;
- In the first four months of 2011, France and Australia were the only two CTC Core Markets to see increases in the total number of trips to Canada, up 7.8% and 4.4% respectively over 2010.

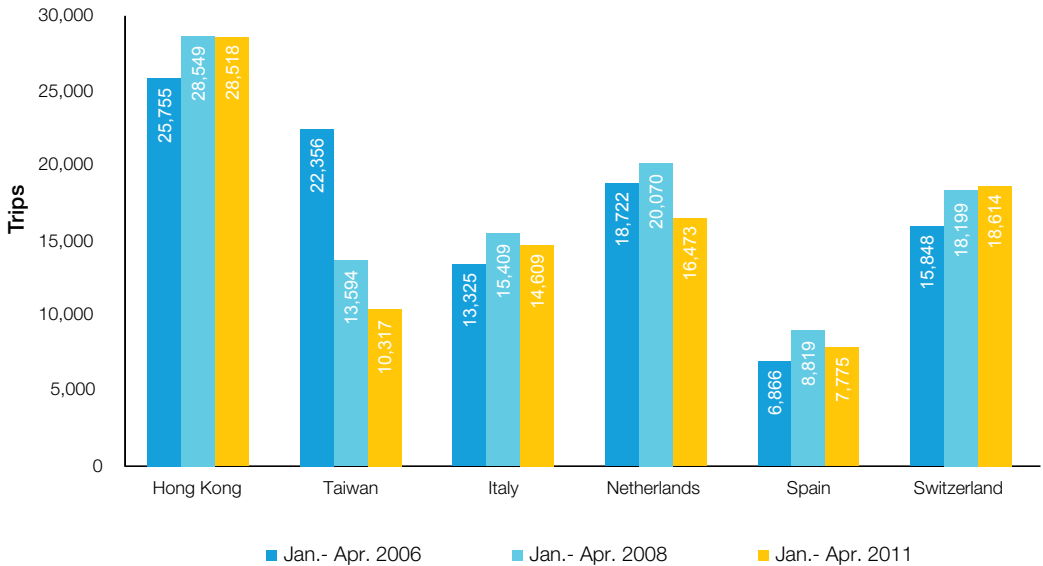
Emerging/ Transition Markets

- In April 2011, Mexico reported a strong gain in arrivals, up 28.2% compared with the same month in 2010. China (+14.0%) and India (+0.3%) also saw improvements in arrivals;
- Year to date April, Japan (-16.7%) and South Korea (-5.1%) were the only Emerging/ Transition markets to report overall declines in overnight visitation to Canada, while China (+15.8%) and Brazil (+12.6%) reported improvements in arrivals to Canada;
- In April 2011, Saskatchewan (+49.7%), Newfoundland and Labrador (+31.6%) and Manitoba (+31.0%) reported the strongest increases in arrivals from countries other than the US;
- During the first four months of 2011, Québec (+9.7%) and Ontario (+6.5%) reported increases in overnight international arrivals (from all destinations excluding the US), while Alberta (-21.8%) and British Columbia (-12.2%) saw declines over the same period.

Market Watch

- Year-to-date April 2011, four of the six selected secondary markets posted increases in overnight trip volumes over 2006;
- In the first four months of 2011, Switzerland (+17.5%) posted the most notable increase in arrivals to Canada, followed by Spain (+13.2%), when compared with the same period in 2006;
- Overnight trips from Taiwan and the Netherlands declined relative to the first four months of 2006, down 22.6% and 12.0% respectively.

Overnight trips to Canada, by selected markets



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

Competitive review (March 2011)

International Travel, March 2011 (in thousands)

Trips From:	Trips To:					
	Canada		United States		Australia	
		11/10 % Change		11/10 % Change		11/10 % Change
Total International	2,105	-5	12,887	2	1,538	0
United States	1,498	-4	...	...	125	-2
Canada	...	...	4,573	5	38	-5
Core Markets						
United Kingdom	94	-13	698	-4	189	-12
France	69	2	258	20	25	-7
Germany	34	-20	306	-12	47	-3
Australia	35	5	119	21	...	...
Emerging/ Transition Markets						
Japan	31	-18	839	-2	93	-15
South Korea	27	-4	267	15	57	-3
Mexico ¹	20	-5	2,902	-3	...	...
Brazil	16	19	343	29	8	9
China ²	35	17	218	33	180	23
India	19	3	123	9	38	14
Total Key Markets	1,877	-5	10,647	2	798	-1

- Year-to-date March 2011, international travel to Canada fell by 5%, the US reported growth of 2% and total arrivals remained unchanged for Australia over 2010;
- In the first three months of 2011, Australia outperformed both the US and Canada in attracting overnight visitors from India, with a 14% increase in arrivals;
- During the first three months of 2011, the US saw the greatest increase in overnight arrivals from China (+33%), with Australia (+23%) and Canada (+17%) also posting gains from this market;
- For the year, Canada reported a steeper decline in arrivals from Japan (-18%), while the US reported a drop of 2% and arrivals into Australia fell 15%, over the same period in 2010.

...Not applicable or data not available.

¹ US figures for Mexico include arrivals to interior only.

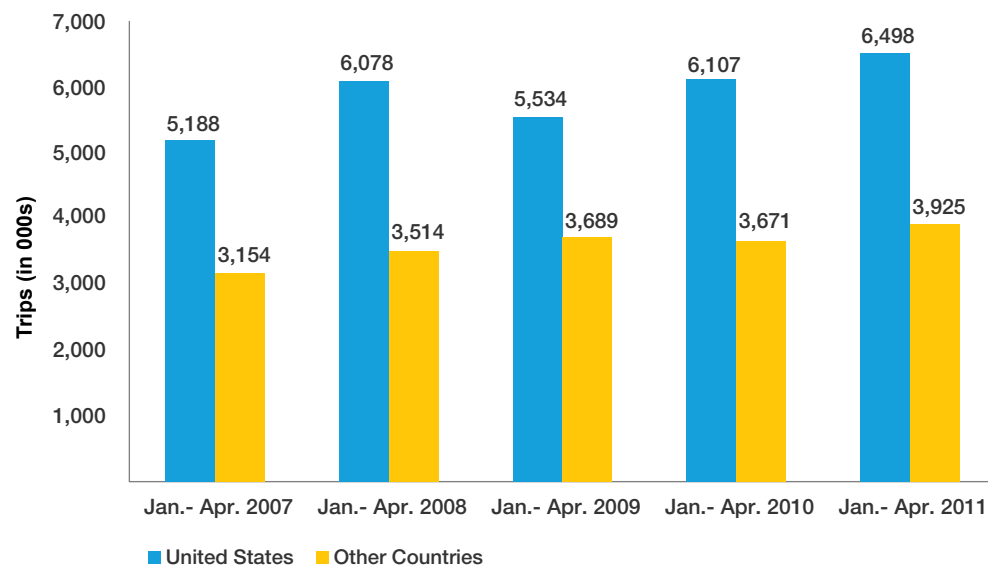
² US figures for China includes Hong Kong, SAR;

Note: Statistics Canada preliminary figures.

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

Canadian outbound trips

Overnight trips by Canadians



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

- Compared with April 2010, Canadian outbound travel increased by 8.5% to 2.8 million trips;
- This month, there was an 8.8% increase in overnight trips to the US by Canadian residents, while overnight travel to overseas destinations also posted growth with increases of 7.7% for April and a year-to-date increase of 6.9%;
- In the first four months of 2011, Nova Scotia (+34.3%) reported the greatest increase in travel to the US, while Newfoundland and Labrador (-9.1%) was the only province/territory to post a decline compared with the same period in 2010;
- From January to April 2011, Québec (+10.9%), Ontario (+8.4%) and Alberta (+5.7%) saw increases in the number of residents visiting countries other than the US, while British Columbia (-0.8%) reported a decline.

Overnight trips by Canadians

	Apr. 2011	11/10 Apr. % Change	Jan.- Apr. 2011	Year-to-date % Change
United States	1,925,637	8.8	6,498,306	6.4
Other Countries	894,350	7.7	3,924,524	6.9
Total Trips from Canada	2,819,987	8.5	10,422,830	6.6

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

Consumer outlook

Consumer confidence

- **Canada:** Consumer confidence rose in April to 87.7 (2002 = 100), an increase of 4 points.
- **USA:** The Conference Board Consumer Confidence Index®, which had decreased in March, improved in April. The Index now stands at 65.4 (1985=100), up from 63.8 in March.

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

Accommodations

- In April 2011, the national occupancy rate increased by 0.6 points over the previous year to 56.9%. Prince Edward Island posted the largest increase (+14.2 points) while Newfoundland and Labrador posted the largest decline (-7.1 points);
- Year-to-date April, the national occupancy rate grew by 0.8 points, reaching 54.2%. The Yukon (+7.1 points), Northwest Territories (+6.7 points) and Prince Edward Island (+6.2 points) have reported the greatest growth;
- For April 2011, the national average Daily Rate fell 0.9% to \$119.60. The Northwest Territories, Québec, Alberta, Saskatchewan and British Columbia posted rates higher than the average Daily Rate;
- In the first four months of 2011, the average Revenue per Available Room (RevPAR) was \$65.51, down 2.7%, with Saskatchewan, Alberta, Québec and Manitoba posting rates above the national average.

Canadian Occupancy Rates, By Province*

	Apr. 2011	11/10 Change [^]	Jan.-Apr. 2011	Year-to-date Change [^]
Alberta ¹	58.9	2.3	58.3	4.1
British Columbia	56.4	1.1	51.9	-4.1
Saskatchewan	68.5	-0.2	64.8	-1.8
Manitoba	61.3	-0.6	60.3	0.5
Ontario	57.2	0.0	54.1	2.0
Quebec	54.2	0.6	53.5	2.1
New Brunswick	48.6	-1.5	46.7	-0.3
Nova Scotia	55.2	-1.2	51.7	0.9
Newfoundland	59.1	-7.1	54.2	-2.4
Prince Edward Island	46.4	14.2	40.9	6.2
Northwest Territories	58.0	2.2	66.1	6.7
Yukon	76.2	13.0	72.3	7.1
Canada	56.9	0.6	54.2	0.8

* Note: Based on the operating results of 217,161 rooms (unweighted data).

[^] Percentage points.

¹ Excluding Alberta resorts.

Source: PKF Consulting Inc.