

Tourism Snapshot

2010 Year-in-review

Current Designs

Tourism highlights

- In 2010, international visitors made 15.9 million overnight trips to Canada, up 1.8% compared with 2009.
- Canada saw gains in total overnight inbound travel in the last two quarters of 2010 of 3.3% and 3.2% respectively, after posting declines for the first half of 2010.
- In 2010, pleasure travel accounted for more than 50% of all overnight arrivals to Canada, after a 2.8% increase in arrivals over 2009.
- Overall, overnight visitors spent \$11.9 billion, a 3.4% rise; the average spend per trip increased by 1.6% to \$750.
- Canada's international travel account deficit was \$14.3 billion in 2010, a 17.2% increase over 2009.
- Total tourism Gross Domestic Product (GDP) reached \$29.7 billion in 2010 (2.0% of Canada's GDP).
- Employment attributable to the tourism sector remained stable with 617,300 jobs in 2010, a 0.1% increase over the previous year.
- This year, Canadian outbound travel to the US and other international markets increased by 9.5% totaling 28,680,000 overnight trips. The US was the main destination for seven out of ten overnight trips made by Canadians in 2010.
- Canadians spent \$26.5 billion during outbound overnight trips in 2010, a 10.2% increase over 2009. Of that total, 55.7% was spent in the US.



Tourism highlights

Tourism in the Canadian economy

	\$ billions	10/09 %
Total demand	74.2	6.8
Domestic	59.4	7.2
International	14.8	4.9
Tourism GDP	29.7	7.0

Note: Statistics Canada, National Tourism Indicators (2010 Q4).

Canada's International Travel Account (2010)

	All countries	US	Overseas
	\$ billions		
Receipts	16.2	7.2	9.0
Payments	30.5	18.2	12.3
Balance	-14.3	-10.9	-3.3

Source: Statistics Canada, *International Travel Account* (2011 Q1)

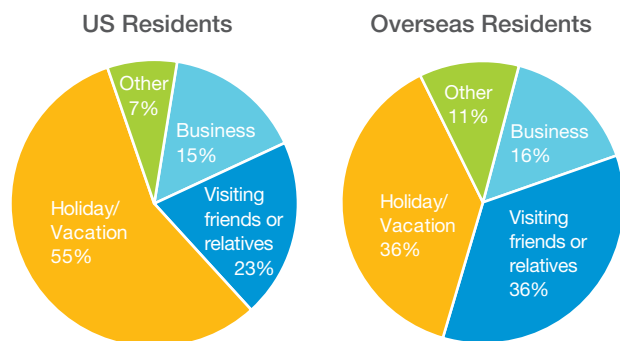
*Figures may not add up exactly due to rounding

Overnight trips to Canada

	Trips '000	10/09 %	Spending \$ B	10/09 %
United States				
United States Leisure	10,008	0.9%	4.8	2.8%
United States MC & IT	1,741	-0.2%	1.4	3.0%
Total United States	11,749	0.7%	6.3	2.8%
United States Proportion of all countries %	74.1%		52.6%	
Core Markets				
United Kingdom	659	-3.8%	0.8	-9.5%
France	408.1	5.1%	0.5	1.6%
Germany	315.4	8.1%	0.5	5.8%
Australia	202.2	7.5%	0.3	9.3%
Core Total	1,585.1	2.0%	2.1	-1.0%
Emerging/Transition Markets				
Japan	215.4	19.5%	0.3	21.9%
South Korea	157.5	20.0%	0.3	18.1%
Mexico	116	-28.1%	0.2	-31.7%
Brazil	71	25.5%	0.1	32.2%
China	193.3	21.2%	0.3	21.5%
India	149.9	16.6%	0.1	18.8%
Emerging/Transition Total	903.3	10.5%	1.3	11.3%
Total CTC Key Overseas Markets	2,488	12.6%	3.5	11.0%
Overseas Key Markets' Proportion of all countries %	15.7%		29.2%	
Other Overseas Countries	1,628	5.1%	2.2	5.1%
Other Overseas Countries' Proportion of all countries %	10.3%		18.2%	
Total countries	15,864	1.8%	11.9	3.4%

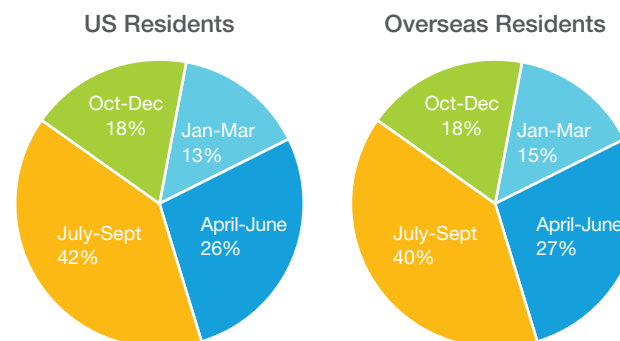
Tourism highlights

Distribution of international tourists to Canada by purpose



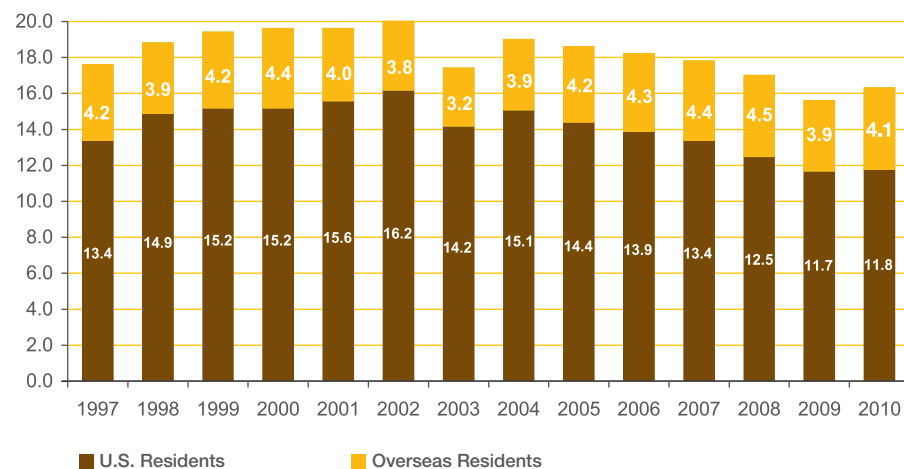
Source: Statistics Canada, *International Travel Survey*

Distribution of international tourists to Canada by quarter



Source: Statistics Canada, *International Travel Survey*

International tourists to Canada, overnight trips (millions)



Source: Statistics Canada, *International Travel Survey*

Top ten overseas countries visited by Canadians –2010

	Trips '000	Spending \$ millions	Nights '000
Mexico	1,354	1,426	14,540
Cuba	1,006	746	8,385
United Kingdom	883	1,012	10,725
Dominican Republic	754	664	6,396
France	740	914	8,882
Italy	376	483	3,831
Germany	329	277	3,331
China	299	506	6,149
Netherlands	225	168	1,695
Spain	217	272	2,435

Source: Statistics Canada, *International Travel Survey*

Competitive review

International travel, January–December 2010 (in 000s)

	Trips To:							
	Canada		United States		UK		Australia	
Trips from:	#	10/09 Change	#	10/09 Change	#	10/09 Change	#	10/09 Change
Total International	15,864	2%	59,745	9%	29,637	-1%	5,885	5%
United States	11,749	1%	...	...	2,671	-7%	472	-2%
Canada	...	...	19,959	11%	678	-1%	122	-1%
Overseas Key Markets								
France	659	-4%	1,342	11%	3,610	-5%	97	4%
Germany	408	5%	1,726	2%	2,994	8%	160	-1%
United Kingdom	315	8%	3,851	-1%	...	...	647	-3%
Australia	202	8%	904	25%	976	7%	...	...
Japan	215	20%	3,386	16%	220	-6%	398	12%
South Korea	158	20%	1,108	49%	...	...	214	18%
Mexico ¹	116	-28%	13,423	2%	67	-17%	...	...
Brazil	71	26%	1,198	34%	...	...	27	5%
China ²	193	21%	802	53%	138	8%	454	24%
India	150	17%	650	19%	365	34%	139	11%
Total Key Markets	14,237	1%	48,349	9%	11,719	0%	2,730	6%

...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.

Sources of information

International Travel Survey (ITS)

Travel Characteristics – The ITS is an ongoing quarterly survey conducted by Statistics Canada that provides a wealth of data on international trip characteristics such as expenditures, activities, places visited and length of stay.

Volume of International Travelers – With the help of Canada Border Services Agency, all ports of entry across Canada participate in collecting monthly census counts of vehicles and passengers entering or re-entering Canada by country of residence and mode.

National Tourism Indicators (NTI) – The NTI were developed to provide timely quarterly updates to the main components of the Tourism Satellite Account (TSA), the yardstick that compares the tourism industry with all other industries in the national economy. The NTI can be used to support research on the trends, cycles and quarterly patterns in various tourism aspects or in the industry as a whole. Comparisons can be drawn with all other industries in the national economy.

For more current information, please refer to the monthly Tourism Snapshot.

www.canada.travel.com

CTC Marketing, Research

CTC key international markets – travellers' characteristics

					Americas						Core Markets			
	Total International Markets	y/y %	Total CTC Key Markets	y/y %	US	y/y %	US Leisure	y/y %	US MC&IT	y/y %	UK	y/y %	France	y/y %
Overnight Person-trips (000's)	15,864.4	1.8%	14,236.9	1.4%	11,748.5	0.7%	10,007.7	0.9%	1,740.8	-0.2%	659.4	-3.8%	408.1	5.1%
Overnight Travel Spending (\$M)	11,901.8	3.4%	9,735.0	3.1%	6,259.1	2.8%	4,839.6	2.8%	1,419.5	3.0%	808.9	-9.5%	520.8	1.6%
Average Party Size	1.8	-1.6%	1.86	-1.8%	2.0	-2.0%	2.1	-2.3%	1.4	-0.7%	1.6	-0.6%	1.6	4.6%
Average Trip Duration (Nights)	7.5	2.1%	6.4	1.0%	4.0	-1.2%	4.1	-1.4%	3.3	0.9%	13.4	-2.1%	16.2	-0.9%
Average Spending per Trip (\$)	750.2	1.6%	683.8	1.6%	532.8	2.1%	483.6	1.9%	815.4	3.2%	1,226.7	-6.0%	1,276.1	-3.3%
Average Spending per Person-Night (\$)	100.1	-0.5%	107.3	0.6%	132.8	3.3%	116.8	3.4%	248.1	2.3%	91.8	-3.9%	78.9	-2.4%
Seasonality (000's)														
1st. Quarter	2,198.0	-0.5%	1,957.0	-1.5%	1,561.0	-2.1%	1,159.2	-2.4%	401.8	-1.2%	106.5	-2.0%	67.1	17.7%
2nd Quarter	4,184.3	-0.2%	3,740.7	-0.7%	3,064.1	-2.3%	2,580.1	-2.8%	484.0	1.1%	187.9	-2.2%	93.1	5.7%
3rd Quarter	6,602.5	3.3%	5,949.1	3.0%	4,962.4	2.0%	4,517.8	2.8%	444.6	-5.0%	258.3	-0.8%	183.4	4.4%
4th Quarter	2,879.6	3.2%	2,590.2	3.4%	2,161.0	4.2%	1,750.7	4.0%	410.3	4.9%	106.6	-14.3%	64.6	-4.3%
Main Trip Purpose (000's)														
Business	2,412.9	2.6%	2,086.7	2.0%	1,740.8	-0.2%	0.0	N/A	1,740.8	-0.2%	81.7	-0.7%	52.1	10.6%
VFR	4,214.8	3.4%	3,469.1	3.2%	2,735.5	4.5%	2,735.5	4.5%	0.0	N/A	260.3	-9.5%	138.3	-0.7%
Pleasure	7,981.5	2.8%	7,416.8	2.3%	6,488.0	2.2%	6,488.0	2.2%	0.0	N/A	280.3	2.5%	185.0	5.8%
Other	1,255.3	-10.1%	1,043.4	-12.9%	784.3	-17.9%	784.3	-17.9%	0.0	N/A	37.2	-12.3%	32.7	21.1%
Gender (%)														
Male	50.6%	-0.9%	50.7%	-0.7%	50.6%	-0.7%	48.0%	-0.4%	65.8%	-1.7%	47.5%	-0.7%	52.3%	-1.3%
Female	49.4%	0.9%	49.3%	0.7%	49.4%	0.7%	52.0%	0.4%	34.2%	1.7%	52.5%	0.7%	47.7%	1.3%
Age (000's)														
24 & Under	2,150.1	-0.7%	1,935.2	-1.5%	1,468.6	-5.8%	1,410.4	-5.9%	58.1	-1.9%	94.6	24.3%	82.3	15.8%
25-34	1,720.8	2.5%	1,423.2	1.9%	1,030.5	0.2%	836.4	1.2%	194.1	-4.1%	95.2	0.3%	61.0	-8.7%
35-44	2,108.6	-3.3%	1,826.6	-2.6%	1,458.9	-4.6%	1,135.9	-4.1%	323.0	-6.1%	90.0	6.8%	56.4	24.8%
45-54	2,848.3	0.2%	2,541.0	-0.5%	2,096.4	-2.4%	1,582.8	-3.1%	513.6	-0.1%	110.2	1.6%	60.7	-15.7%
55+	6,100.8	7.0%	5,640.8	7.1%	4,856.4	7.8%	4,345.1	8.6%	511.4	1.5%	262.1	-12.7%	142.5	17.6%
Accommodation Types (000's Person-Trips)														
Hotel Only	6,266.3	7.9%	5,833.7	8.0%	5,068.2	7.3%	3,676.9	9.3%	1,391.3	2.2%	205.8	4.0%	86.6	6.5%
Motel Only	828.2	-22.8%	805.7	-23.6%	775.2	-24.8%	694.5	-26.0%	80.7	-13.2%	8.5	19.7%	4.3	104.8%
Home of Friends or Relatives Only	3,470.1	4.1%	2,808.7	4.2%	2,115.0	3.4%	2,077.5	3.6%	37.5	-10.1%	228.2	11.2%	117.6	16.4%

Note: Travel characteristic levels and proportions do not include 'not stated' responses. Travellers may visit more than one province and participate in more than one activity while on a trip.
Source: Statistics Canada, *International Travel Survey*, Preliminary May 27, 2010

	Total International Markets	y/y %	Total CTC Key Markets	y/y %	Americas						Core Markets			
					US	y/y %	US Leisure	y/y %	US MC&IT	y/y %	UK	y/y %	France	y/y %
Camping or Trailer Park Only	344.9	-4.4%	329.5	-6.7%	315.4	-5.8%	313.2	-5.8%	2.2	-4.3%	0.7	-80.0%	0.0	N/A
Cottage or Cabin Only	907.2	1.2%	903.6	0.8%	883.3	1.4%	877.9	1.6%	5.4	-28.0%	4.2	-19.2%	1.3	-18.8%
Hotel & Motel	208.2	-14.8%	191.3	-15.9%	151.0	-23.4%	129.0	-18.1%	22.0	-44.4%	5.3	-38.4%	14.8	127.7%
Other Combinations of Two or More Types	1,540.3	3.6%	1,323.3	4.0%	894.2	6.1%	856.2	6.6%	38.1	-2.8%	93.5	-18.1%	116.8	1.4%
Activities (000's)														
Visit Friends or Relatives	6,745.3	3.6%	5,679.4	4.1%	4,231.6	5.8%	4,012.5	6.3%	219.1	-2.3%	420.4	-9.0%	265.3	2.0%
Attend a Festival or Fair	1,565.9	-1.8%	1,334.3	-1.5%	944.4	0.5%	891.3	1.4%	53.1	-12.2%	78.9	-17.7%	79.8	-13.0%
Attend Cultural Events	1,936.3	0.6%	1,735.7	0.7%	1,409.5	3.2%	1,316.7	2.3%	92.8	17.9%	76.6	-24.1%	75.3	-9.4%
Visit a Zoo, Aquarium/Botanical Garden	2,285.8	2.3%	1,959.0	3.5%	1,342.2	7.0%	1,273.9	7.9%	68.3	-7.8%	142.7	-10.0%	120.7	-10.8%
Visit a Historic Site	4,955.7	3.0%	4,305.5	2.7%	3,284.2	4.1%	2,985.1	3.6%	299.1	9.4%	274.4	-14.6%	209.6	4.6%
Go Shopping	9,898.1	-0.8%	8,503.2	-1.5%	6,385.4	-3.0%	5,725.8	-3.3%	659.6	-0.5%	570.6	-4.2%	338.2	3.4%
Go Sightseeing	8,425.6	0.4%	7,292.9	-0.4%	5,404.1	-2.3%	4,877.3	-2.6%	526.9	0.7%	487.0	-5.8%	281.3	7.1%
Go to a Bar or Night Club	3,797.8	2.2%	3,366.3	2.4%	2,610.4	3.6%	2,032.5	2.5%	577.9	7.7%	274.4	-7.8%	138.5	0.3%
Visit a Museum or Art Gallery	3,795.9	2.2%	3,314.2	2.3%	2,386.1	1.1%	2,163.6	0.2%	222.5	10.9%	230.0	-8.7%	194.0	8.9%
Visit a National or State Nature Park	4,647.9	4.4%	3,925.7	5.0%	2,640.7	6.5%	2,496.3	7.2%	144.4	-4.6%	353.4	-8.0%	211.2	11.6%
Participate in Sports/Outdoor Activities	4,170.3	-2.4%	3,807.2	-4.0%	3,126.7	-4.3%	2,972.7	-4.7%	154.0	4.2%	179.7	-16.2%	127.6	6.1%
Provinces Visited (000's)														
Newfoundland	91.6	6.3%	73.7	4.8%	57.2	17.0%	49.0	15.3%	8.2	28.1%	9.3	-45.9%	1.9	58.3%
Prince Edward Island	160.1	16.0%	150.1	16.7%	116.6	6.2%	113.3	5.3%	3.3	50.0%	6.4	36.2%	7.8	420.0%
Nova Scotia	465.4	8.7%	387.9	9.2%	307.9	13.7%	287.4	14.8%	20.5	0.0%	22.7	-32.6%	14.9	0.0%
New Brunswick	446.5	6.9%	419.5	5.1%	381.9	4.0%	358.0	2.3%	23.9	39.0%	9.5	-22.8%	10.1	77.2%
Quebec	2,845.5	4.6%	2,423.4	4.5%	1,804.8	4.5%	1,490.4	4.2%	314.4	5.8%	86.4	-0.8%	309.1	4.6%
Ontario	7,402.3	-1.7%	6,608.4	-1.9%	5,630.6	-2.4%	4,773.1	-2.1%	857.5	-4.0%	272.9	-7.4%	111.4	-8.3%
Manitoba	277.0	-4.7%	254.3	-1.7%	212.8	-0.7%	170.9	-6.0%	41.9	29.3%	9.0	-28.6%	4.1	-28.1%
Saskatchewan	203.0	-3.6%	182.7	-0.6%	145.1	-4.7%	124.2	-8.5%	20.9	26.7%	14.0	26.1%	1.8	50.0%
Alberta	1,515.7	-0.3%	1,270.9	0.4%	811.7	0.0%	615.8	1.7%	195.9	-4.9%	162.8	-13.4%	14.4	-38.7%
British Columbia	4,359.2	4.4%	3,865.9	3.4%	2,954.2	1.9%	2,648.6	2.0%	305.6	0.6%	231.0	-1.9%	30.4	19.2%
Yukon	226.3	5.9%	213.6	8.7%	187.1	7.9%	179.5	5.8%	7.6	105.4%	4.7	-20.3%	5.2	642.9%
Northwest Territories	26.2	3.1%	23.1	-6.5%	15.0	-6.3%	11.2	-20.0%	3.8	90.0%	0.9	28.6%	0.6	N/A
Total Province Visits	18,018.8	1.5%	15,891.6	1.3%	12,624.9	0.5%	10,821.5	0.6%	1,803.4	0.1%	829.6	-8.1%	511.7	3.0%

Note: Travel characteristic levels and proportions do not include 'not stated ' responses. Travellers may visit more than one province and participate in more than one activity while on a trip.
Source: Statistics Canada, *International Travel Survey*, Preliminary May 27, 2010

					Emerging/Transition Markets											
	Germany	y/y %	Australia	y/y %	Japan	y/y %	S Korea	y/y %	Mexico	y/y %	Brazil	y/y %	China	y/y %	India	y/y %
Overnight Person-trips (000's)	315.4	8.1%	202.2	7.5%	215.4	19.5%	157.5	20.0%	115.9	-28.1%	71.3	25.5%	193.3	21.2%	149.9	16.6%
Overnight Travel Spending (\$M)	470.8	5.8%	341.2	9.3%	330.1	21.9%	255.0	18.1%	158.0	-31.7%	128.9	32.2%	317.1	21.5%	145.2	18.8%
Average Party Size	1.6	1.9%	1.7	3.7%	1.3	2.3%	1.2	0.8%	1.4	-4.1%	1.7	15.3%	1.3	-11.0%	1.6	-6.6%
Average Trip Duration (Nights)	17.1	-3.4%	14.5	2.8%	14.0	1.9%	26.4	0.3%	22.3	-0.9%	21.4	24.0%	27.6	-1.7%	21.7	-0.3%
Average Spending per Trip (\$)	1,492.8	-2.2%	1,687.1	1.7%	1,532.4	2.0%	1,619.5	-1.6%	1,363.2	-5.1%	1,807.7	5.3%	1,640.0	0.2%	968.3	1.9%
Average Spending per Person-Night (\$)	87.4	1.3%	116.8	-1.1%	109.8	0.1%	61.4	-1.9%	61.2	-4.2%	84.6	-15.0%	59.5	2.0%	44.7	2.2%
Seasonality (000's)																
1st. Quarter	42.1	13.5%	30.3	-3.8%	35.7	8.5%	27.9	3.0%	20.6	-44.0%	13.6	22.5%	30.4	-0.3%	21.8	20.4%
2nd Quarter	88.3	18.4%	63.9	19.0%	53.0	36.6%	43.6	34.2%	31.4	-42.9%	17.7	24.6%	47.3	18.0%	50.4	10.3%
3rd Quarter	145.2	9.1%	63.8	0.2%	79.5	23.3%	57.6	22.8%	44.4	-17.6%	26.2	44.0%	76.3	37.2%	52.0	21.2%
4th Quarter	39.8	-15.1%	44.2	12.8%	47.2	7.0%	28.4	14.5%	19.5	25.8%	13.8	3.8%	39.3	18.0%	25.8	17.8%
Main Trip Purpose (000's)																
Business	61.2	32.5%	26.3	44.5%	22.7	3.7%	27.6	14.5%	27.2	-1.1%	5.4	-22.9%	47.1	43.6%	34.3	58.1%
VFR	85.9	17.2%	59.4	32.6%	46.8	8.8%	47.2	10.8%	31.3	-24.2%	19.3	9.7%	64.4	-10.3%	74.2	9.8%
Pleasure	152.0	3.8%	107.3	-7.4%	112.5	40.8%	24.9	17.5%	31.8	-53.4%	28.7	62.1%	35.0	82.3%	30.6	1.0%
Other	16.3	-36.6%	9.2	0.0%	33.5	-5.6%	57.7	32.9%	25.7	6.2%	17.9	23.4%	46.8	31.5%	10.8	20.0%
Gender (%)																
Male	53.5%	-3.9%	47.4%	-1.6%	40.1%	-4.9%	59.8%	0.9%	53.1%	-2.2%	48.6%	-5.3%	54.1%	-1.5%	62.2%	11.0%
Female	46.5%	3.9%	52.6%	1.6%	59.9%	4.9%	40.2%	-0.9%	46.9%	2.2%	51.4%	5.6%	45.9%	1.5%	37.8%	-14.0%
Age (000's)																
24 & Under	57.0	15.4%	23.4	-36.4%	42.4	1.9%	48.9	28.3%	28.3	-25.7%	N/A	N/A	37.5	32.5%	15.4	4.8%
25-34	51.4	8.2%	27.1	43.4%	45.6	34.5%	38.3	10.1%	12.3	-56.5%	11.4	-27.4%	38.3	58.9%	23.8	19.0%
35-44	42.5	-19.7%	14.0	-25.9%	24.3	0.0%	30.3	4.8%	29.9	-9.9%	13.7	59.3%	36.5	33.7%	30.1	94.2%
45-54	77.3	28.8%	35.2	21.8%	28.1	40.5%	21.5	17.5%	26.2	-14.7%	14.7	129.7%	38.4	1.9%	32.3	84.6%
55+	81.8	8.2%	98.2	24.5%	69.7	26.3%	17.7	84.4%	18.5	-28.0%	12.5	-23.3%	38.6	-0.5%	42.8	-18.5%
Accommodation Types (000's Person-Trips)																
Hotel Only	86.7	-1.9%	75.1	25.4%	105.5	21.4%	31.8	15.6%	44.1	-32.6%	32.4	161.3%	57.8	74.6%	39.7	84.7%
Motel Only	6.7	55.8%	3.8	15.2%	3.1	40.9%	0.8	-11.1%	0.3	-62.5%	0.3	N/A	2.2	83.3%	0.5	-37.5%
Home of Friends or Relatives Only	61.5	2.0%	36.7	20.3%	38.6	19.1%	55.2	7.4%	28.6	-18.1%	16.5	-10.8%	60.6	-12.6%	66.7	5.4%
Camping or Trailer Park Only	12.2	48.8%	0.9	-25.0%	0.0	N/A	0.0	N/A	0.1	-93.3%	0.0	N/A	0.0	N/A	0.2	N/A
Cottage or Cabin Only	2.2	-12.0%	1.4	-12.5%	2.0	300.0%	0.0	N/A	0.9	-79.1%	0.0	N/A	0.8	0.0%	0.1	N/A
Hotel & Motel	9.9	62.3%	2.5	-45.7%	4.5	1025.0%	0.0	N/A	0.1	-66.7%	2.0	-39.4%	1.2	N/A	0.0	N/A

Note: Travel characteristic levels and proportions do not include 'not stated ' responses. Travellers may visit more than one province and participate in more than one activity while on a trip.
Source: Statistics Canada, *International Travel Survey*, Preliminary May 27, 2010

					Emerging/Transition Markets											
	Germany	y/y %	Australia	y/y %	Japan	y/y %	S Korea	y/y %	Mexico	y/y %	Brazil	y/y %	China	y/y %	India	y/y %
Other Combinations of Two or More Types	94.2	20.3%	39.9	2.3%	23.9	32.8%	19.8	17.9%	11.7	-34.6%	7.4	-2.6%	14.5	-20.3%	7.4	8.8%
Activities (000's)																
Visit Friends or Relatives	152.6	6.7%	119.5	7.1%	80.2	-1.4%	92.4	13.5%	62.6	-16.2%	33.7	5.0%	120.5	0.1%	100.6	5.8%
Attend a Festival or Fair	38.3	-13.9%	37.3	24.7%	31.2	8.0%	36.5	42.0%	25.3	-26.0%	14.6	-11.5%	23.1	-22.2%	24.9	31.7%
Attend Cultural Events	38.4	-11.7%	40.9	66.3%	17.2	-5.5%	26.7	32.8%	17.8	-43.1%	11.7	-29.5%	11.5	5.5%	10.1	-26.8%
Visit a Zoo, Aquarium/Botanical Garden	63.5	-3.3%	72.0	-1.5%	49.7	40.0%	36.2	46.0%	38.3	-34.6%	20.6	2.0%	46.1	4.5%	27.0	11.1%
Visit a Historic Site	152.2	6.7%	105.6	11.0%	52.8	0.2%	35.1	16.6%	44.8	-42.3%	32.6	-2.4%	63.7	27.4%	50.5	26.9%
Go Shopping	252.4	4.9%	175.6	8.3%	186.4	16.8%	144.2	19.4%	97.7	-32.0%	57.6	5.9%	174.5	21.2%	120.6	15.6%
Go Sightseeing	247.8	9.0%	177.2	10.1%	182.2	26.4%	125.1	22.4%	72.4	-37.3%	59.8	31.7%	140.4	13.6%	115.6	14.9%
Go to a Bar or Night Club	79.1	8.4%	83.7	15.6%	36.8	9.5%	42.2	54.6%	31.4	-45.6%	30.2	25.3%	22.6	-13.4%	17.0	53.2%
Visit a Museum or Art Gallery	110.3	-2.0%	109.5	25.6%	63.6	13.8%	49.3	36.2%	43.0	-33.4%	43.0	74.1%	58.2	59.5%	27.2	-11.1%
Visit a National or State Nature Park	194.8	11.1%	124.0	10.3%	103.3	14.5%	75.4	22.4%	56.8	-32.0%	33.7	-5.9%	66.3	-0.9%	66.1	26.1%
Participate in Sports/Outdoor Activities	100.9	-15.9%	90.8	16.1%	44.5	16.2%	55.3	33.6%	26.6	-22.0%	19.1	36.4%	24.7	-14.2%	11.3	66.2%
Provinces Visited (000's)																
Newfoundland	3.3	26.9%	0.8	300.0%	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	1.2	500.0%	N/A	N/A
Prince Edward Island	6.7	191.3%	0.7	-84.1%	9.1	111.6%	0.3	-40.0%	0.1	N/A	N/A	N/A	2.4	118.2%	N/A	N/A
Nova Scotia	22.4	39.1%	2.4	-70.0%	5.2	-1.9%	0.4	-50.0%	1.3	85.7%	1.7	N/A	6.8	126.7%	2.2	266.7%
New Brunswick	8.0	33.3%	2.5	-34.2%	0.9	-10.0%	0.5	-44.4%	0.3	-78.6%	0.8	N/A	4.7	1075.0%	0.3	-40.0%
Quebec	61.6	-9.9%	32.6	34.2%	25.2	5.4%	6.7	-37.4%	28.6	-40.7%	26.6	166.0%	32.3	94.6%	9.5	21.8%
Ontario	108.3	-2.8%	62.4	32.5%	92.3	1.3%	57.8	11.6%	44.2	-31.2%	53.4	30.9%	100.0	26.6%	75.1	12.4%
Manitoba	9.7	-4.0%	6.4	-11.1%	0.6	-50.0%	1.1	37.5%	1.9	72.7%	1.3	-38.1%	6.7	109.4%	0.7	-30.0%
Saskatchewan	8.6	50.9%	6.4	8.5%	1.5	-53.1%	1.8	28.6%	0.7	16.7%	0.2	N/A	2.8	12.0%	2.0	300.0%
Alberta	82.2	4.8%	58.1	11.3%	57.6	68.4%	31.9	21.3%	6.2	-3.1%	5.2	-34.2%	25.9	3.6%	14.9	104.1%
British Columbia	119.0	7.3%	124.0	-3.7%	105.5	26.2%	93.4	27.6%	50.5	-21.0%	16.3	11.6%	109.6	19.0%	48.3	110.9%
Yukon	14.4	41.2%	1.9	-64.2%	0.3	-25.0%	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Northwest Territories	1.7	-10.5%	0.5	-66.7%	4.3	-6.5%	N/A	N/A	0.1	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Total Province Visits	445.9	5.1%	298.6	3.4%	302.4	19.6%	193.9	16.5%	133.9	-28.2%	105.5	39.9%	292.3	30.7%	152.9	42.5%

Note: Travel characteristic levels and proportions do not include 'not stated' responses. Travellers may visit more than one province and participate in more than one activity while on a trip.
Source: Statistics Canada, *International Travel Survey*, Preliminary May 27, 2010

Analysis of CTC's key international markets travel characteristics

In an increasingly competitive environment, tourism market intelligence is an ingredient for success. It provides a foundation for informed decision making and underpins strategic business planning.

The inside table of the **Tourism Snapshot Facts and Figures 2010 Year Review** (pages 5-8) provides various travel characteristics for the markets in which the Canadian Tourism Commission (CTC) is active. The key highlights below summarize the salient points for each of CTC's core markets.

Other valuable tourism CTC intelligence reports include: the *Tourism Snapshot*, which provides a monthly and year-to-date update on key CTC market performance, occupancy rates, key economic figures, and other tourism-related statistics; the *Short-Term Competitive Outlook* and the *Tourism Intelligence Bulletin*, produced for the CTC by the Conference Board of Canada; and the Global Tourism Watch (GTW), which tracks the awareness of Canada as a tourist destination and general market intelligence. These reports, as well as summary reports of consumer and travel trade studies are available on CTC's website www.canada.travel/corporate, under the research and intelligence section.



St. John's, Newfoundland and Labrador

Key highlights by market

US Leisure

- In 2010, the US had a more sluggish than expected economic recovery, with GDP growth of 2.9%. By the end of the year, economists reported weaker than expected consumer spending, along with declines in construction spending, durable goods orders and home building sales, a reflection of the lingering effects of the 2008-2009 recession. This cooler economic environment impacted both US leisure and business travel in 2010, with slower than expected growth compared with the previous year.
- US leisure travel represents Canada's largest inbound travel market, accounting for 63% of all inbound travellers in 2010. US leisure travel to Canada outperformed business travel in 2010, with a moderate increase of 0.9% over 2009.
- While leisure travel to Canada declined in the first two quarters of 2010, the last two quarters saw increases of 2.8% in Q3 and 4.0% in Q4.
- Total spending by US leisure travellers of one or more nights improved in 2010, up 2.8% overall, with the average nightly spend increasing 3.4% to \$116.
- This year saw an 8.6% increase in the number of overnight US leisure travellers in who were 55 years of age or older. This age demographic represents the largest segment among US leisure visitors to Canada, accounting for 46.7% of all overnight US leisure visitors to Canada in 2010.
- Experiencing nature became more popular in this market with visiting aquariums/botanical gardens and zoos (+7.9%) and visiting nature parks (+7.2%) both climbing in 2010.

- In 2010, Québec (+4.2%), British Columbia (+2.0%), Alberta (+1.7%) saw increases in province visits in 2010, while Ontario (-2.1%) experienced a decline.

US Meetings Conventions and Incentive Travel (MC&IT)

- US overnight MC&IT travel is Canada's second largest inbound market after US overnight leisure travel.
- In 2010, 1.7 million US MC&IT overnight travellers visited Canada, a moderate 0.2% decline over the previous year. Of those travellers, 65.8% were male and 64.1% were 45 years of age or older.
- Total spending by this market increased by 3.0% reaching, \$1.4 billion, with the average spend per business trip increasing 3.2% to \$815.
- The volume of business travellers to Canada saw a staggered recovery in 2010, improving in the 2nd and 4th quarters of 2010, helping to offset the reduced growth in the 1st and 3rd quarters.
- US MC&IT travel to Alberta (-4.9%) and Ontario (-4.0%) slowed in 2010, while Québec (+5.8%) and British Columbia (0.6%) had an increased number of province visits.
- This year, there was a 17.9% increase in interest in attending cultural events among US MC&IT travellers, followed by increases in visiting museums and art galleries (+10.9%) and visiting historic sites (+9.4%) compared with the top activities of 2009.

Mexico

- In 2010, Mexico's economy rebounded favorably, reporting GDP growth of 5.4%, following a sharp

decline in 2009. Mexican travel to Canada has been subdued since 2009 due to first the H1N1 flu virus followed by the introduction of visa restrictions. While Canada reported declines in overnight trips from Mexico for the majority of 2010, the year ended on a positive note with three consecutive months of increases in arrivals.

- Mexico's total long-haul outbound travel decreased by 3.3% to 1.5 million trips, with Canada experiencing a one-year decline of 28.1% in arrivals and falling to 115,900.
- Mexican visitors spent \$158.0 million during their visits of one or more nights in Canada, a 31.7% decline over 2009.
- After experiencing consecutive quarterly declines in visitor arrivals for the past two years, Q4 2010 saw a 25.8% year-over-year increase in overnight arrivals.
- In 2010, Mexican demand for business travel (-1.1%) declined at a far slower rate than leisure travel (-33.7%). This year, travel for "other" reasons saw an increase of 6.2%, in part driven by a 22.6% increase in educational-study-related travel.
- While visiting Canada, the majority of Mexican visitors stayed at a hotel (38.1%) or with friends and family (24.7%).
- In 2010, British Columbia and Ontario were the most popular Canadian destinations among overnight Mexican visitors, despite declines in arrivals of 21.0% and 31.2% respectively over 2009.

UK

- The UK represents Canada's largest inbound overseas travel market. However, it has had a very fragile economic recovery over the past two years, reporting moderate GDP growth of just 1.3% in 2010. This market faced low employment, consumer confidence and a devaluating currency - all of which detracted from 2010 travel intentions.
- In 2010, the number of UK overnight visitors to Canada fell 3.8% to 659,400 trips. UK pleasure travel (excludes travel for the main purpose of business, visiting friends and family and "other") saw a 2.5% increase over the previous year, reaching 280,300 trips.
- This year, total overnight spending by UK visitors contracted 9.5% to \$808.9 million, with the average nightly spend declining 3.9% to \$92.
- Although there were more moderate one-digit declines in UK visitors during the first three quarters of 2010, the fourth quarter registered a 14.3% drop over the same quarter in 2009.
- Overnight UK visitors 55 or over were the only age bracket in 2010 that experienced a decline in visitation to Canada, down 12.7%. However there was a 24.3% spurt in the number of visitors 24 years old or younger.
- The main source of accommodation for UK travellers was with friends and family, up 11.2% over 2009.
- In 2010, both Ontario and British Columbia remained the most popular destinations among UK visitors, followed by Alberta and Québec.

France

- Despite a moderate GDP growth of 1.4% and the euro depreciating 9.3% against the Canadian dollar France, Canada's second largest overseas inbound travel market, grew by 5.1%, reaching 408,100 trips.
- Spending by overnight French travellers moderately improved in 2010, reaching \$520.8 million. Of this amounts spending by leisure travellers (includes: visiting friends and family, pleasure, and "other" trips) accounted for 88.4% of receipts.
- The average trip duration of a French traveller was 16 days. During this period, they spent on average \$1,276, down 3.3% compared with 2009.
- A large proportion (45%) of French travellers chose to visit Canada during the summer months (July through September).
- In 2010, more than 35% of French travellers to Canada were 55 years of age or older.
- The majority of province visits were to Québec, which had approximately 309,100 visitors, a 4.6% increase over 2009.
- This year, the top activities that French travellers reported doing while in Canada were shopping, sightseeing, as well as visiting friends and family.

Germany

- Germany reported stronger than expected GDP growth of 3.5% in 2010. Exports were the main engine of growth, despite a fluctuating international economic environment.

- In 2010, gains in overnight trip arrivals (+8.1%) from Germany were higher than gains in overnight spending (+5.8%).
- Business travellers spent \$109.9 million while in Canada, a notable 60.4% increase over the previous year, while leisure travellers spent \$360.9 million, a 4.1% decline over 2009.
- In the first three quarters of 2010, arrivals to Canada grew 13.5%, 18.4% and 9.1% respectively. However, there was a notable 15.1% drop in arrivals in the fourth quarter of 2010 compared with the same quarter in 2009.
- In 2010, Germany province visits to British Columbia increased by 7.3% to 119,000, partially due to the province's hosting the 2010 Winter Olympic Games.
- More than 50% of German travellers were 45 years of age or older, representing approximately 159,100 visitors.
- This year, the third most popular tourism related activity, after shopping and sightseeing, was visiting national or state nature parks, up 11.1% in popularity over 2009.

Australia

- In 2010, Australia posted steady economic growth: a GDP of 2.7%, the average household consumption increasing 2.7%, plus a relatively stable unemployment rate of 5.2%.

- Australia's positive economic performance this year was reflected in healthy gains in both trip arrivals and spending in Canada. Growth in spending (+9.3%) by overnight Australian visitors exceeded growth in arrivals, with Aussies spending \$341.2 million.
- Canada welcomed approximately 202,200 overnight travellers from Australia (up 7.5%) in 2010, with the majority coming during spring (32%) and summer (32%).
- On average, Australians spent 15 days in Canada and spent \$1,687 per trip, a 1.7% increase over 2009.
- This year, 50% of Australian visitors to Canada were 55 years of age or older.
- In 2010, Québec, Ontario and Alberta saw gains in province visits from Australia of 34.2%, 32.5% and 11.3% respectively, while British Columbia saw a 3.7% decline over 2009.

Japan

- Japan reported a swift economy recovery in 2010, with GDP growth of 4.0% and household consumption improving by 1.9%.
- The Japan market represents Canada's largest inbound travel market from Asia. In 2010, overnight arrivals from Japan improved by 19.5%, reaching 215,400 trips, and the total spend by these travellers hit \$330.1 million, a 21.9% year-over-year increase.
- On average, Japanese overnight travellers spent 14 days in Canada and spent \$1,532 per trip, a 2.0% increase over 2009.
- Japanese leisure travellers accounted for approximately 89.5% of visitation in 2010 and 90.4% of receipts.

- The Japanese overnight travel market in 2010 was younger, with 42% of travellers under the age of 35.
- In 2010, top mentioned tourism-related activities were shopping, sightseeing, and visiting national or state nature parks.
- This year, Alberta saw a strong 68.4% increase in province visits, followed by British Columbia (+26.2%), Québec (+5.4%) and Ontario (+1.3%).

South Korea

- South Korea was one of the few established CTC key markets to avoid a recession in 2009, and then reported robust GDP growth of 6.2% in 2010.
- Strong economic performance coincided with gains in overnight trips to Canada (+20.0%) and in overnight travel-related spending (+18.1%).
- In 2010, leisure travellers from South Korea made up 82.5% of visitation and accounted for 86.9% of receipts.
- On average, South Korean travellers spent 26 days in Canada and spent \$61 per night.
- Almost a third (31%) of travellers to Canada from South Korea were 24 years of age or younger.
- In 2010, British Columbia reported the third largest increase in visitation, after Manitoba and Saskatchewan, reaching 93,400 province visits after a 27.6% increase.

China

- China's economy continued to surge in 2010, with GDP growth of 10.3% and average household spending growing by 11.3%.

- In 2010, Chinese overnight travellers spent \$317.1 million while in Canada, up 21.2% compared with 2009. On average, they spent \$1,640 per person trip and stayed on average 28 days.
- This year, 33.3% of overnight Chinese travellers visited Canada for the main purpose of visiting friends and family, down 10.3% on 2009. Business overnight travel to Canada in 2010 represented 24.4% of Chinese overnight travel, a 43.6% increase.
- Chinese travellers preferred to visit Canada during the summer months, with approximately 76,300 visitors coming during this three month period, a 37.2% increase over 2009.
- The popularity of visiting museums or art galleries (+59.5%), historic sites (+27.4%) and shopping (+21.2%) all improved over 2009.

India

- India was one of the strongest economic performers (after China) of CTC's key markets, with GDP growth of 8.6%.
- India performed well in 2010, with a 16.6% growth in overnight trips to Canada, reaching 149,900.
- Total spending by travellers from this market grew by 18.8% to \$145.2 million. However, despite leisure travellers spending accounting for 50.4% of total receipts, spending by leisure travellers fell by 1.6%.
- On average, Indian travellers spent 22 days in Canada and spent \$968 per trip.

- The main purpose for travelling to Canada in 2010 was visiting friends and family (49.5%), followed by business-related travel (22.9%).
- More than 80% of Indian overnight visitors to Canada enjoyed shopping, with sightseeing (77.1%) and visiting friends and family (67.1%) also popular in 2010. Participating in sports and outdoor activities reported the largest increase, up 66.2% over 2009.
- In 2010, British Columbia and Alberta posted substantial gains in provincial visitation from India, up 110.9% and 104.1% respectively.
- This year, 55.3% of travellers from Brazil stayed at a hotel, a 161.3% increase over 2009.
- In 2010, Quebec reported a huge increase in provincial visits from Brazil, up 166.0% and reaching 26,600 visits.

Brazil

- In 2010, Brazil's economy outperformed most projections, with GDP growth of 7.5% following a 0.6% decline in 2009.
- Brazil reported the strongest gains in both overnight trip arrivals (+25.5%) and spending (32.2%) among CTC's key markets.
- On average, visitors from Brazil spent 21 days in Canada and spent \$1,808, a 5.3% increase and the highest spend per trip among CTC key markets.
- Brazil overnight leisure travellers spent \$112.2 million, a 39.4% year-over-year increase that accounted for 87.0% of total receipts.
- The distribution of travellers among the age groups is pretty evenly split. However, as in the majority of CTC's key markets, they preferred to visit during the summer months (36.7%).

CTC Marketing, Research