

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

January 2008

Volume 4, Issue 01

key highlights

In January 2008, visits from CTC's key overseas markets increased 0.9% over January 2007. Notable is the large increase from Australia (+19.8%).

In North America, a large increase in arrivals from Mexico (+23.2%) were offset by declines in trips from the U.S.

Spurred by a strong Canadian dollar, Canadian outbound travel continue to set new records.

tourism review

International trips

- International travellers made 717,967 overnight trips to Canada, a slight decline of -1.9% over January 2007.
- Regionally, total trips from Asia remained steady over January 2007. Canada saw increases from all other regions of the world.
- Canada's key overseas markets posted an increase of 0.9% in January 2008.
- Trips from North America fell 4.1% this month. The increase from Mexico (+23.2%) was offset by declines in the United States (-4.6%).

United States

- In January 2008, total overnight trips from the US decreased by 4.6% to reach 503,348 - the lowest January level in ten years. While automobile trips fell 5.3% and plane trips were down 5.7%, 'other non-automobile trips' rose by 7.6%.
- With the exception of small increases to Nova Scotia, Alberta, and Ontario, US overnight trips to all other provinces decreased this month.

Overnight Trips To Canada

	January 2008	08/07 Jan % Change
Americas*		
United States (Total)	503,348	-4.6
Automobile	281,596	-5.3
Plane	185,613	-5.7
Other	36,139	7.6
Mexico	13,537	23.2
Americas Total	516,885	-4.1
Overseas Key Markets		
France	19,055	4.6
Germany	10,906	-5.5
UK	39,095	1.2
China	9,118	14.7
Japan	10,908	-21.2
South Korea	13,537	-3.9
Australia	16,610	19.8
Overseas Key Markets	119,229	0.9
As % of Overseas and Americas	19%	
Other Overseas Countries	81,853	9.7
Total Non-US Countries	214,619	5.3
Total International Countries	717,967	-1.9

Overnight Trips by Canadians

	January 2008	08/07 Jan. % Change
United States	1,314,137	13.1
Other Countries	934,710	7.8
Total Trips from Canada	2,248,847	10.8

Note: Statistics Canada preliminary estimates.

Source: Statistics Canada, International Travel Survey.

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

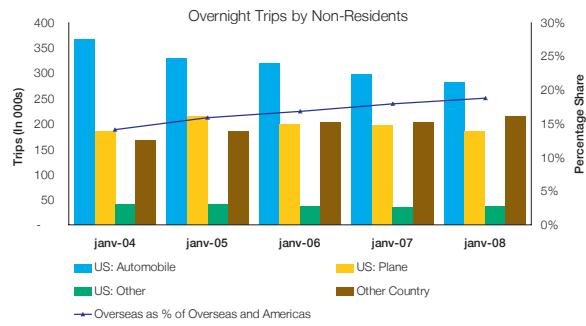
tourism snapshot

Mexico

- Trips from Mexico increased 23.2% in January - posting the highest growth rate of all CTC key markets.

Overseas Key Markets

- In January 2008, 4 of the 7 key overseas markets posted increases.
- Australia (+19.8%) and China (+14.7%) posted the largest growth rates, while Japan posted the largest decline of 21.2%.
- Trips from France, U.K., China, and Australia have reached a 5-year high.



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

Share of Entry

- In January 2008, there were 516,885 trips from the U.S. and Mexico, accounting for 81.3% of total visitors from CTC key markets. Half a million were US visitors, accounting for 79.1% of the total -- 44.3% were automobile trips, 29.2% were plane trips, and 5.7% were other non-automobile trips. Mexico accounted for 2.2% of trips from key markets.
- About 120,000 visitors from our key overseas markets travelled to Canada, accounting for 18.7% of the total. Notable, trips from the UK accounted for 6.1% of the total, France accounted for 3.0% and Australia accounted for 2.6% of total visitors from key markets.
- Overseas key markets have gained share of entry over the North American markets, reaching 19% in January 2008 -- up from 18% in January 2007 and up from 17% from January 2006.

Market Watch

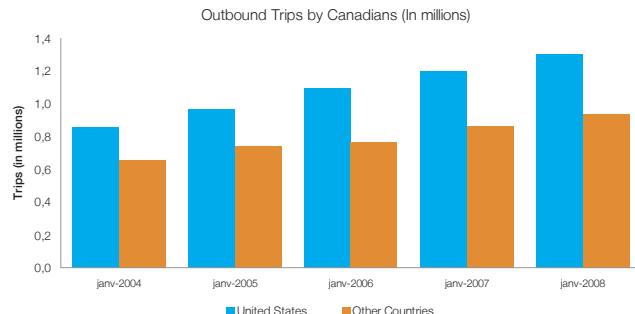
- In January 2008, 3 of the 8 selected markets saw double digit increases compared to January 2007 - Hong Kong, Brazil and Switzerland (+33.6%, +19.2% and +11.3%, respectively).
- Compared to January 2006, trips from Taiwan and Hong Kong have dropped (by -36.4% or 1,944 fewer trips and -14% or 983 fewer trips, respectively). Trips from the Netherlands and India saw marginal declines in January 2008 compared to the same period in 2006 (by -2.4% or 90 fewer trips and -0.8% or 37 fewer trips). Canada saw steady increases in trips from Brazil (+15%) and Switzerland (+14.7%) in January 2008 compared to the same period in 2006.



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

Canadian Outbound Trips

- With the U.S. and Canadian dollar continuing at par in January, Canada outbound travel to the U.S. posted a 13.1% increase over the same period last year with 1.3 million outbound trips.
- Outbound travel to international destinations rose 7.8% over the same period last year, just shy of reaching the 1 million mark in outbound trips.
- In January, outbound international travel rose in all provinces with the exception of Newfoundland, New Brunswick and the Yukon.



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

consumer outlook

Consumer Confidence

CANADA: Canadians continue to feel less confident - the index fell 0.8 points from December 2007 to reach 95.3 in January 2008. Compared to the previous year, Canadian consumer confidence is down from 101.1 in January 2007.

UNITED STATES: Following a modest rebound in December 2007, the US consumer confidence fell 2.7 points over the previous month to reach 87.9 in January 2008. Compared to the previous year, the confidence index fell 22 points from the January 2007.

Sources: The Conference Board Inc. (USA), and the Conference Board of Canada.

competitive review (Jan. - Nov. 2007)

- From January - November 2007, Canada experienced a slight decline (-1%) of international arrivals, while the U.S. and Australia posted increases of 11% and 3%, respectively.
- Compared to Australia, Canada posted a higher increase of arrivals from the U.K. (+5% vs. -2%). Canada posted a stronger increase of arrivals from Mexico (+18%) compared to the U.S. (+16%).
- The United States posted the largest increases from all overseas key markets than either Canada and Australia.
- All three countries experienced declines from Japan -- Canada: -15%, Australia: -12%, and the U.S.: -4%.

International Travel, January-November 2007 (In 000s)

Trips from:	Trips to:					
	Canada		United States		Australia	
#	07/06 Change	#	07/06 Change	#	07/06 Change	
Total International	16,893	-1	44,148	11	5,029	3
Americas						
United States	12,643	-3	...	...	415	1
Mexico	226	18	5,912	16	...	...
Overseas Key Markets						
France	349	1	910	27	65	8
Germany	293	2	1,401	9	134	2
United Kingdom	847	5	4,085	7	585	-2
China	142	5	501	18	327	16
Japan	316	-15	3,246	-4	523	-12
South Korea	186	3	743	7	232	0
Australia	198	9	600	11	...	...
Canada	...	...	16,523	10	100	2
Total Key Markets	15,200	-2	33,922	10	2,381	-1

...Not applicable or data not available. Note: 1. US figures for China includes Hong Kong, SAR; US figures for Mexico include arrivals to interior only. 2. Statistics Canada preliminary figures.

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

accommodations

Please note that accommodation figures will be available in the February 2008 Tourism Snapshot and subsequent issues.

strategic performance

Please note that the strategic performance figures will be posted in the Q1 2008 Tourism Snapshot and subsequent issues.

CTC Marketing
Market Research