Canadian Tourism Commission | Commission canadienne du tourisme

Canada

Tourism Snapshot

2009 Year-in-review

Facts & Figures | 4th edition

www.canada.travel/corporate

Tourism highlights

- In 2009, international visitor’s made15.6 million trips to Canada, down 22% compared with Canada’s peak in international arrivals in 2002;
- International visitors over the age of 45 made 8.5 million trips to Canada in 2009, representing Canada’s largest visitor age group;
- Overall, visitors spent $11.5 billion during their stay in Canada, spending on average $738 per trip;
- Total tourism Gross Domestic Product (GDP) reached $29.0 billion in 2009 or 2.0% of Canada’s GDP;
- Canada’s international travel account deficit was at $12.2 billion in 2009, a moderate 3.2% improvement over 2008;
- Employment attributable to tourism spending reached 649,900 jobs in 2009, for a decrease of 2.0% over the previous year;
- Canadians made 26,197,700 overnight trips to international travel destinations in 2009, a 3% decrease over 2008; almost seven out of ten trips were taken to the US;
- Canadians spent $24.0 billion on outbound overnight trips in 2009, a 2% decline relative to 2008. 53% of total spending by Canadians was made in the US and the remaining 47% was made in overseas countries.

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Tourism highlights

Tourism in the Canadian economy

	$ billions	09/08 %
Total demand	**71.5**	**-4.4**
Domestic	57.3	-3.0
International	14.2	-9.3
Tourism GDP	29.0	-4.2

Note: Statistics Canada, Nathional Tourism Indicators, Q4 2009.

Canada's international travel account

	All countries	US	Overseas
		$ billions	
Receipts	15.6	7.1	8.5
Payments	27.8	15.7	12.0
Balance	**-12.2**	**-8.6**	**-3.6**

Source: Statistics Canada, *International Travel Account*, Q4 2009
*Figures may not add up exactly due to rounding

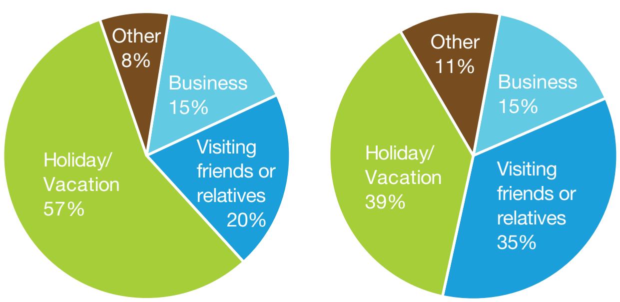
Overnight trips to Canada

	Trips '000	09/08 %	Spending $ B	09/08 %
Americas				
United States Leisure	9,921	-6.1%	4.7	-6.5%
United States MC & IT	1,745	-9.7%	1.4	-14.9%
Total United States	11,666	-6.7%	6.1	-8.5%
Mexico	161	-37.4%	0.2	-36.4%
Total Americas	**11,827**	**-7.3%**	**6.3**	**-10.0%**
America's* proportion of all countries %	75.9%		54.8%	
Overseas				
United Kingdom	686	-18.1%	0.9	-24.6%
France	388	-4.1%	0.5	-5.0%
Germany	291	-7.6%	0.4	-5.0%
Japan	180	-30.4%	0.3	-24.6%
South Korea	131	-24.0%	0.2	-20.9%
China	159	0.4%	0.3	-0.9%
Australia	188	-14.3%	0.3	-12.8%
India	126	-2.0%	0.1	-1.1%
Brazil	56.7	-19.2%	0.1	-11.2%
Total Overseas Core Markets	2,207	-14.0%	3.1	-14.9%
Overseas Core Markets' proportion of all countries %	**14.2%**		**27.2%**	
Other Overseas Countries	1,549	-7.3%	2.1	-9.1%
Other Overseas Countries' proportion of all countries %	**9.9%**		**18.0%**	
Total countries	**15,583**	**-8.3%**	**11.5**	**-11.2%**

Source: Statistics Canada, *International Travel Survey,* preliminary estimates
*Refers to the CTC's marketing group in the US and Mexico

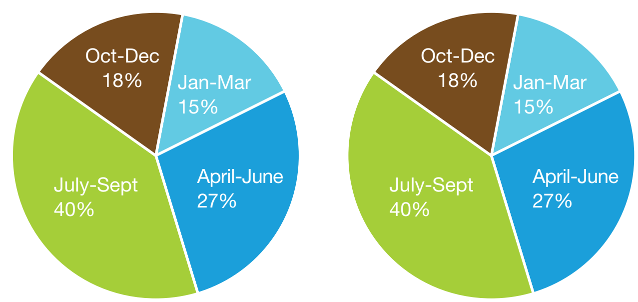
Tourism highlights

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

	Trips '000	Spending $ millions	Nights '000
Mexico	1,207	1,309	12,303
Cuba	980	806	8,436
Dominican Republic	878	791	7,413
United Kingdom	878	991	10,563
France	733	908	8,613
Italy	363	487	3,680
Germany	313	266	2,936
China	264	441	5,436
Netherlands	261	196	2,050
Spain	217	285	2,380

Source: Statistics Canada, *International Travel Survey*

Competitive review

International travel, January–December 2009 (in 000s)

Trips from:	Trips To: Canada #	Canada 09/08 Change	United States #	United States 09/08 Change	Australia #	Australia 09/08 Change	UK #	UK 09/08 Change
Total International	15,583	-8%	47,738	-5.4%	5,585	0%	29,716	-7%
Americas								
United States	11,666	-7%	…	…	480	6%	2,825	-4%
Mexico[1]	161	-37%	13,164	-4%	…	…	80	23%
Overseas Key Markets								
France	388	-4%	1,204	-3%	93	9%	3,808	5%
Germany	291	-8%	1,687	-5%	161	0%	2,758	-5%
United Kingdom	686	-18%	3,899	-15%	664	-1%	…	…
China[2]	159	0%	641	1%	366	3%	128	-6%
Japan	180	-30%	2,918	-10%	355	-22%	233	-3%
South Korea	131	-24%	744	-2%	181	-17%	…	…
Australia	188	-14%	724	5%	…	…	901	-5.7%
India	126	-2%	549	-8%	125	8%	270	-25%
Brazil	57	-19%	893	16%	…	…	…	…
Canada	…	…	17,958	-5%	123	-1%	685	-20%
Total Key Markets	14,033	-8%	26,423	-6%	2,426	-4%	11,003	-2.1%

…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.

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.

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CTC Marketing, Research

CTC core international markets – travellers' characteristics

					Americas									
	Total International Markets	09/08%	Total CTC Key Markets	y/y %	US	y/y %	US Leisure	y/y %	US MC&IT	y/y %	Mexico	y/y %	Brazil	y/y %
Overnight Person-trips (000's)	15,582.9	-8.3%	14,033.7	-8.4%	11,665.7	-6.7%	9,920.8	-6.1%	1,744.9	-9.7%	161.1	-37.4%	56.7	-19.2%
Overnight Travel Spending ($M)	11,494.5	-11.2%	9,429.8	-11.7%	6,072.2	-8.5%	4,693.8	-6.5%	1,378.5	-14.9%	231.6	-36.4%	97.6	-11.2%
Average Party Size	1.8	-1.6%	1.89	-1.7%	2.0	-2.0%	2.2	-3.1%	1.4	0.0%	1.5	3.5%	1.4	-4.7%
Average Trip Duration (Nights)	7.3	-1.7%	6.3	-2.6%	4.1	-1.2%	4.2	-1.4%	3.3	-1.2%	22.5	13.2%	16.0	-16.3%
Average Spending per Trip ($)	737.6	-3.2%	671.9	-3.5%	520.5	-2.0%	473.1	-0.4%	790.0	-5.7%	1,437.9	1.6%	1,719.3	9.8%
Average Spending per Person-Night ($)	100.5	-1.5%	106.9	-0.9%	128.2	-0.7%	112.6	1.0%	242.7	-4.7%	64.0	-10.2%	107.3	31.2%
Seasonality (000's)														
1st. Quarter	2,208.6	-8.2%	1,987.1	-8.8%	1,594.7	-7.7%	1,188.0	-7.0%	406.7	-9.4%	36.8	-22.7%	11.1	-11.2%
2nd Quarter	4,190.8	-7.5%	3,766.0	-7.2%	3,134.7	-5.1%	2,655.7	-3.5%	478.9	-13.4%	55.0	-16.7%	14.2	-19.8%
3rd Quarter	6,393.7	-8.9%	5,776.6	-9.0%	4,863.9	-6.9%	4,396.0	-6.7%	467.9	-8.0%	53.9	-46.5%	18.2	-25.1%
4th Quarter	2,789.9	-8.3%	2,504.4	-8.7%	2,072.5	-7.9%	1,681.1	-8.0%	391.3	-7.3%	15.5	-63.9%	13.2	-15.9%
Main Trip Purpose (000's)														
Business	2,352.4	-10.4%	2,049.4	-12.3%	1,744.9	-9.7%	0.0	N/A	1,744.9	-9.7%	28.4	-42.0%	7.5	19.0%
VFR	4,075.8	0.0%	3,362.9	2.1%	2,618.7	4.8%	2,618.7	4.8%	0.0	N/A	40.4	-42.5%	17.2	-20.4%
Pleasure	7,758.5	-12.2%	7,243.8	-12.2%	6,346.1	-10.7%	6,346.1	-10.7%	0.0	N/A	68.2	-26.7%	18.0	-30.8%
Other	1,396.2	-4.7%	1,195.0	-3.7%	956.0	-1.0%	956.0	-1.0%	0.0	N/A	24.2	-46.1%	14.0	-14.1%
Gender (%)														
Male	51.4%	0.3%	51.4%	0.3%	51.3%	0.3%	48.5%	0.5%	67.5%	-0.3%	55.8%	2.6%	52.8%	-4.8%
Female	48.6%	-0.3%	48.6%	-0.3%	48.7%	-0.3%	51.5%	-0.5%	32.5%	0.3%	44.2%	-2.6%	47.2%	5.9%
Age (000's)														
24 & Under	2,163.8	-10.4%	1,957.9	N/A	1,558.7	-4.7%	1,499.5	-4.0%	59.3	-18.9%	37.1	-50.5%	N/A	N/A
25-34	1,677.2	-7.6%	1,399.4	-9.8%	1,027.6	-5.6%	825.2	-5.0%	202.4	-7.7%	28.1	-39.6%	16.1	-4.2%
35-44	2,180.7	-10.6%	1,876.8	-12.5%	1,529.3	-10.7%	1,184.9	-9.9%	344.3	-13.1%	34.1	-31.3%	9.0	-7.2%
45-54	2,838.3	-6.3%	2,552.0	-6.3%	2,145.1	-5.6%	1,631.8	-5.0%	513.3	-7.5%	30.9	-25.4%	6.2	-29.5%
55+	5,703.0	-6.9%	5,265.0	-6.7%	4,507.5	-5.3%	4,003.3	-5.0%	504.3	-7.6%	25.7	-35.9%	16.6	-2.9%
Accommodation Types (000's Person-Trips)														
Hotel Only	5,805.4	-11.3%	5,407.2	-11.9%	4,725.0	-9.4%	3,363.4	-8.3%	1,361.6	-12.0%	65.8	-37.0%	12.7	-42.5%
Motel Only	1,071.3	-11.1%	1,054.3	-10.9%	1,030.4	-10.7%	937.5	-11.7%	92.9	1.2%	0.8	-55.6%	0.0	N/A
Home of Friends or Relatives Only	3,334.9	-1.0%	2,697.3	0.2%	2,046.7	3.8%	2,005.0	3.5%	41.7	22.6%	35.1	-46.6%	18.2	-16.1%

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	09/08%	Total CTC Key Markets	y/y %	Americas									
					US	y/y %	US Leisure	y/y %	US MC&IT	y/y %	Mexico	y/y %	Brazil	y/y %
Camping or Trailer Park Only	360.9	-2.8%	353.1	-1.6%	335.0	-2.0%	332.7	-0.8%	2.3	-64.6%	1.5	-16.7%	0.0	N/A
Cottage or Cabin Only	896.6	-9.3%	896.9	-9.3%	871.5	-8.6%	864.2	-8.4%	7.3	-28.4%	4.3	65.4%	0.0	N/A
Hotel & Motel	244.3	-4.3%	227.8	-5.6%	197.1	-4.0%	157.5	-2.4%	39.7	-9.8%	0.3	N/A	3.3	N/A
Other Combinations of Two or More Types	1,486.9	-14.9%	1,266.7	-15.3%	842.2	-14.2%	802.9	-14.4%	39.2	-9.9%	16.6	-48.8%	7.5	-7.4%
Activities (000's)														
Visit Friends or Relatives	6,508.1	-3.4%	5,454.2	-2.5%	3,998.1	-0.2%	3,773.5	-0.1%	224.6	-0.8%	74.2	-39.3%	32.2	-8.8%
Attend a Festival or Fair	1,595.4	-10.9%	1,351.8	-8.2%	939.7	-1.2%	879.2	-1.7%	60.5	6.9%	33.2	-49.9%	16.7	-15.7%
Attend Cultural Events	1,925.7	-8.2%	1,722.9	-5.4%	1,366.4	-1.0%	1,287.6	-0.9%	78.8	-1.6%	29.8	-42.9%	16.9	-16.3%
Visit a Zoo, Aquarium/Botanical Garden	2,233.7	-14.2%	1,891.0	-14.1%	1,254.5	-11.3%	1,180.4	-11.3%	74.2	-11.0%	57.8	-32.1%	19.6	-18.3%
Visit a Historic Site	4,810.3	-12.9%	4,189.0	-12.8%	3,151.0	-11.4%	2,877.4	-10.5%	273.6	-19.7%	77.4	-37.8%	33.6	-10.2%
Go Shopping	9,975.8	-9.8%	8,632.0	-9.9%	6,580.8	-7.5%	5,917.5	-7.3%	663.4	-9.3%	143.4	-38.3%	55.0	-19.0%
Go Sightseeing	8,391.4	-12.2%	7,321.0	-12.7%	5,528.3	-10.7%	5,004.7	-10.6%	523.6	-12.2%	115.0	-38.2%	45.1	-5.5%
Go to a Bar or Night Club	3,716.9	-10.3%	3,287.5	-10.9%	2,519.4	-8.8%	1,983.4	-8.4%	536.0	-10.4%	57.2	-31.1%	23.6	-15.4%
Visit a Museum or Art Gallery	3,713.6	-13.6%	3,234.3	-13.4%	2,359.1	-10.8%	2,158.2	-11.0%	200.9	-9.7%	64.4	-38.4%	23.8	-8.5%
Visit a National or State Nature Park	4,451.5	-11.4%	3,744.1	-12.3%	2,480.9	-9.1%	2,329.4	-8.7%	151.5	-15.0%	82.6	-29.9%	36.2	-6.0%
Participate in Sports/Outdoor Activities	4,271.4	-11.8%	3,956.8	-11.2%	3,264.7	-9.9%	3,117.1	-9.7%	147.6	-13.3%	33.1	-46.5%	13.3	15.7%
Provinces Visited (000's)														
Newfoundland	82.4	18.9%	69.3	12.0%	48.9	-3.9%	42.5	1.7%	6.4	-29.7%	N/A	N/A	N/A	N/A
Prince Edward Island	137.2	-14.9%	127.7	-15.8%	109.4	-10.1%	107.2	-9.8%	2.2	-21.4%	N/A	N/A	N/A	N/A
Nova Scotia	425.4	-8.4%	355.8	-10.8%	270.4	-12.0%	249.9	-12.4%	20.5	-6.8%	0.7	-80.0%	N/A	N/A
New Brunswick	413.8	2.9%	396.5	3.2%	366.0	6.6%	349.0	7.3%	17.0	-4.5%	1.4	-33.3%	N/A	N/A
Quebec	2,717.8	-9.6%	2,315.2	-9.6%	1,726.6	-6.3%	1,429.2	-4.6%	297.4	-13.4%	48.2	-46.1%	10.3	-46.9%
Ontario	7,534.0	-8.9%	6,734.1	-9.0%	5,768.9	-7.3%	4,876.0	-7.0%	892.9	-9.0%	64.5	-47.1%	41.8	-25.2%
Manitoba	289.1	-9.2%	258.1	-11.5%	214.2	-13.2%	181.8	-16.7%	32.4	13.3%	1.1	-56.0%	2.1	950.0%
Saskatchewan	210.6	3.8%	183.8	0.1%	152.5	8.2%	135.7	11.0%	16.8	-9.7%	0.7	-36.4%	N/A	N/A
Alberta	1,525.4	-8.5%	1,266.0	-8.6%	811.9	-5.3%	605.5	-1.8%	206.4	-14.1%	6.5	-43.0%	7.9	19.7%
British Columbia	4,171.6	-9.5%	3,736.5	-9.4%	2,899.3	-7.3%	2,595.4	-7.2%	303.9	-7.7%	63.5	-22.8%	13.3	33.0%
Yukon	214.5	1.1%	196.5	-2.3%	173.4	-4.0%	169.7	-2.9%	3.7	-36.2%	N/A	N/A	N/A	N/A
Northwest Territories	25.5	-12.4%	24.9	-10.4%	16.0	-5.9%	14.0	-11.4%	2.0	66.7%	N/A	N/A	N/A	N/A
Total Province Visits	17,747.0	-8.6%	15,678.3	-8.8%	12,557.4	-6.7%	10,755.8	-6.1%	1,801.6	-9.9%	186.7	-40.7%	75.4	-18.1%

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

	Europe						Asia/Pacific									
	UK	y/y %	France	y/y %	Germany	y/y %	Japan	y/y %	China	y/y %	Australia	y/y %	S Korea	y/y %	India	y/y %
Overnight Person-trips (000's)	685.8	-18.1%	388.0	-4.1%	291.4	-7.6%	180.3	-30.4%	159.4	0.4%	188.0	-14.3%	131.3	-24.0%	126.0	-2.0%
Overnight Travel Spending ($M)	892.2	-24.6%	514.1	-5.0%	443.1	-5.0%	268.7	-24.6%	260.6	-0.9%	310.3	-12.8%	218.4	-20.9%	120.9	-1.1%
Average Party Size	1.6	-5.4%	1.5	-4.4%	1.5	-1.9%	1.3	-7.1%	1.5	7.4%	1.6	-3.0%	1.2	-6.9%	1.6	-3.6%
Average Trip Duration (Nights)	13.6	0.0%	16.5	-4.9%	17.4	4.5%	13.5	12.4%	27.9	-0.4%	14.0	4.8%	25.5	5.6%	21.1	-2.7%
Average Spending per Trip ($)	1,300.9	-8.0%	1,324.9	-0.9%	1,520.4	2.8%	1,490.6	8.3%	1,634.2	-1.3%	1,650.6	1.7%	1,663.4	4.1%	959.1	0.9%
Average Spending per Person-Night ($)	95.8	-8.0%	80.3	4.2%	87.4	-1.6%	110.6	-3.6%	58.7	-0.9%	117.7	-2.9%	65.2	-1.5%	45.4	3.7%
Seasonality (000's)																
1st. Quarter	108.7	-23.1%	57.0	-2.6%	37.1	5.1%	32.9	-23.3%	30.5	14.7%	31.5	-10.3%	27.1	-20.5%	19.7	8.8%
2nd Quarter	192.1	-17.2%	88.1	-1.6%	74.6	-15.0%	38.8	-41.4%	40.1	-4.1%	53.7	-14.6%	32.5	-28.6%	42.2	-7.7%
3rd Quarter	260.4	-19.8%	175.6	-6.4%	133.1	-8.0%	64.5	-32.4%	55.6	-1.6%	63.7	-20.5%	46.9	-28.5%	40.8	-4.9%
4th Quarter	124.6	-10.1%	67.3	-2.3%	46.7	-2.1%	44.0	-19.0%	33.3	-1.8%	39.2	-4.9%	24.8	-10.1%	23.3	6.4%
Main Trip Purpose (000's)																
Business	81.8	-26.2%	47.4	-14.9%	46.9	-25.1%	22.1	-40.6%	34.4	7.5%	18.1	-39.3%	25.4	-6.6%	26.4	21.7%
VFR	287.7	3.3%	140.9	18.5%	73.3	-5.7%	43.3	-29.6%	69.9	-5.3%	45.6	-13.3%	43.1	-30.9%	61.1	-9.6%
Pleasure	273.9	-31.4%	174.6	-10.6%	145.8	-5.3%	80.0	-36.7%	19.0	-17.4%	115.0	-9.9%	21.2	-28.1%	27.0	-10.9%
Other	42.4	-11.9%	25.2	-27.0%	25.4	20.4%	34.8	2.7%	36.2	20.7%	9.3	-1.1%	41.5	-22.6%	11.5	27.8%
Gender (%)																
Male	48.3%	-0.8%	53.8%	1.2%	57.6%	1.7%	44.2%	-1.8%	55.9%	-1.4%	48.9%	-0.1%	58.6%	1.1%	57.8%	3.0%
Female	51.7%	0.8%	46.2%	-1.2%	42.4%	-1.7%	55.8%	1.8%	44.1%	1.4%	51.1%	0.1%	41.4%	-1.1%	42.2%	-3.9%
Age (000's)																
24 & Under	75.9	-34.5%	70.6	-11.2%	48.7	-10.5%	40.6	-20.4%	27.7	-5.1%	35.6	8.5%	37.8	-29.7%	17.2	17.0%
25-34	95.0	-12.2%	69.0	-5.3%	48.1	0.0%	35.0	-37.2%	25.0	-7.1%	18.9	-33.2%	34.1	-15.4%	18.6	-7.0%
35-44	83.8	-29.7%	45.1	-7.0%	53.8	-27.3%	23.8	-33.1%	27.1	-10.0%	19.1	24.0%	29.5	-16.9%	22.2	43.2%
45-54	108.7	-25.8%	70.2	7.8%	60.1	3.1%	20.3	-31.6%	38.7	34.8%	29.7	-0.3%	18.7	-27.8%	23.4	33.7%
55+	300.8	-9.2%	120.9	-6.6%	74.6	0.4%	55.3	-24.0%	37.7	-9.8%	78.9	-26.1%	9.7	-33.6%	37.3	-29.0%
Accommodation Types (000's Person-Trips)																
Hotel Only	198.3	-30.4%	81.3	-7.3%	89.1	-14.8%	87.5	-38.2%	34.0	-17.9%	60.3	-26.4%	27.7	-13.4%	25.5	18.6%
Motel Only	7.1	-27.6%	2.1	-41.7%	4.3	-37.7%	2.2	15.8%	1.2	-7.7%	4.0	48.1%	1.2	100.0%	1.0	25.0%
Home of Friends or Relatives Only	205.5	-6.9%	100.5	18.8%	60.7	6.5%	32.5	-12.4%	69.7	-3.7%	30.1	-38.6%	51.4	-26.6%	65.1	2.8%
Camping or Trailer Park Only	3.5	483.3%	2.0	-25.9%	8.2	7.9%	1.2	N/A	0.0	N/A	1.2	-72.7%	0.5	N/A	0.0	N/A
Cottage or Cabin Only	5.0	-30.6%	1.6	-44.8%	2.5	-41.9%	0.5	-66.7%	0.8	-20.0%	1.8	-71.0%	1.4	55.6%	0.0	N/A
Hotel & Motel	8.6	-40.7%	6.4	-38.5%	6.1	19.6%	0.4	N/A	0.0	N/A	5.0	42.9%	0.6	-75.0%	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

	Europe						Asia/Pacific									
	UK	y/y %	France	y/y %	Germany	y/y %	Japan	y/y %	China	y/y %	Australia	y/y %	S Korea	y/y %	India	y/y %
Other Combinations of Two or More Types	113.6	-25.6%	114.5	-11.3%	77.4	-10.0%	17.6	-19.3%	18.4	29.6%	37.9	15.5%	16.4	-46.2%	4.6	-32.4%
Activities (000's)																
Visit Friends or Relatives	462.3	-7.5%	261.9	6.4%	142.6	-0.3%	80.4	-23.4%	120.4	8.8%	111.2	-4.7%	82.1	-26.8%	88.8	-6.6%
Attend a Festival or Fair	94.9	-37.8%	92.9	1.0%	44.4	-1.1%	28.6	-12.8%	29.3	0.7%	27.6	-17.4%	26.1	-17.1%	18.4	-2.6%
Attend Cultural Events	100.8	-22.5%	85.0	-3.7%	42.6	1.9%	17.8	-23.6%	11.2	-0.9%	23.0	-36.3%	20.0	-16.3%	9.4	-31.9%
Visit a Zoo, Aquarium/Botanical Garden	158.4	-27.0%	137.4	-12.0%	65.7	-27.4%	34.7	-18.0%	45.1	40.5%	70.9	-15.3%	24.5	-21.7%	22.4	-7.8%
Visit a Historic Site	320.7	-12.4%	202.9	-11.9%	141.8	-12.5%	53.1	-29.6%	49.1	-4.3%	92.6	-18.1%	30.0	-38.4%	36.8	-7.5%
Go Shopping	596.1	-18.9%	327.5	-6.4%	239.1	-10.3%	159.2	-29.7%	145.1	4.5%	161.0	-13.9%	120.1	-22.0%	104.7	0.4%
Go Sightseeing	516.7	-18.6%	265.1	-9.6%	227.5	-10.9%	143.7	-34.2%	123.6	-6.9%	159.9	-15.1%	101.5	-25.8%	94.6	-6.0%
Go to a Bar or Night Club	298.0	-20.4%	141.6	-13.1%	73.0	-13.9%	32.2	-31.9%	27.2	18.8%	70.8	-3.9%	27.4	-26.7%	17.1	54.1%
Visit a Museum or Art Gallery	251.3	-19.7%	179.4	-18.9%	111.3	-5.0%	55.6	-29.4%	36.9	-4.9%	86.0	-13.9%	36.4	-39.1%	30.1	-1.6%
Visit a National or State Nature Park	384.3	-13.6%	191.5	-12.7%	175.3	-15.2%	90.6	-36.2%	68.9	-14.6%	111.9	-22.5%	60.9	-35.8%	61.0	16.4%
Participate in Sports/Outdoor Activities	214.9	-26.3%	119.8	-18.9%	118.8	10.6%	36.5	-32.3%	28.2	45.4%	76.4	-1.7%	41.6	-22.4%	9.5	39.7%
Provinces Visited (000's)																
Newfoundland	17.2	300.0%	1.1	-31.3%	1.7	-51.4%	N/A	N/A	0.2	-60.0%	0.2	N/A	N/A	N/A	N/A	N/A
Prince Edward Island	4.7	-24.2%	1.5	7.1%	2.3	-70.1%	4.4	-49.4%	1.1	-15.4%	3.9	178.6%	0.4	-87.9%	N/A	N/A
Nova Scotia	33.7	-17.6%	15.8	54.9%	16.1	-32.4%	5.3	82.8%	3.1	416.7%	8.1	14.1%	0.9	-50.0%	1.7	183.3%
New Brunswick	12.3	-15.8%	5.8	-30.1%	6.1	-37.1%	1.0	-37.5%	0.4	-85.2%	2.0	81.8%	0.9	125.0%	0.6	20.0%
Quebec	87.5	-28.5%	294.4	-5.8%	68.9	-4.7%	23.1	-36.0%	16.7	17.6%	22.6	-32.1%	10.6	-15.9%	6.3	-19.2%
Ontario	294.7	-17.3%	120.5	2.5%	110.5	-11.6%	90.9	-29.8%	80.4	7.2%	46.3	-29.4%	51.6	-14.9%	64.0	-4.2%
Manitoba	12.6	-30.4%	5.7	256.3%	9.2	-1.1%	1.2	50.0%	3.9	105.3%	6.5	12.1%	1.2	-67.6%	0.4	-60.0%
Saskatchewan	11.0	-44.2%	1.2	0.0%	5.8	-29.3%	2.8	21.7%	2.5	-32.4%	5.9	118.5%	1.4	-63.2%	0.6	20.0%
Alberta	188.2	-18.1%	23.5	-6.7%	79.2	-13.5%	32.9	-44.8%	23.6	-4.1%	52.7	29.2%	27.4	-13.6%	12.2	67.1%
British Columbia	235.2	-19.9%	26.3	-3.7%	111.0	-0.6%	83.3	-33.2%	92.1	2.1%	128.2	-9.6%	71.5	-31.3%	26.1	14.0%
Yukon	5.9	22.9%	0.7	-75.0%	10.2	20.0%	0.4	-33.3%	0.6	N/A	5.3	55.9%	N/A	N/A	N/A	N/A
Northwest Territories	0.7	-41.7%	N/A	N/A	1.9	46.2%	4.8	-22.6%	N/A	N/A	1.5	-28.6%	N/A	N/A	N/A	N/A
Total Province Visits	903.7	-18.7%	496.6	-2.6%	422.8	-10.6%	250.3	-33.0%	224.4	4.6%	283.2	-7.2%	165.9	-25.4%	111.9	4.3%

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 core 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* 2009 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.

Key highlights by market

US Leisure

- By the end of 2009, the US appeared to be poised to emerge from one of the deepest recessions on record. After a year characterized by plummeting housing prices, a weakening currency and record high unemployment, it is no wonder that ailing economic conditions had a detrimental impact on the demand for US leisure travel to Canada;
- US leisure travel is Canada's largest inbound market, accounting for 64% of all overnight visitors. In 2009, there were 9.9 million leisure visitors from the US, a 6.1% decline from 2008;
- Of those visitors, 64% visited for pleasure while 26% and 10% travelled to visit friends and relatives or for "other" reasons (including student travel and personal travel such as weddings);
- Overnight leisure visitors from the US spent $4.7 billion while visiting Canada in 2009, staying on average 4 nights and spending approximately $473 per trip;
- In 2009, the majority of US leisure travellers visited during the summer (44%) and spring (27%);
- The most popular activities for US leisure travellers were shopping, sightseeing, visiting friends and relatives, participating in sports and outdoor activities and visiting historic sites;
- Ontario and British Columbia welcomed 4.9 and 2.6 million, respectively, US overnight leisure travellers in 2009. Saskatchewan posted the largest increase (+11%) in visitors from this market, reaching approximately 135,700 visits;
- US economic conditions are expected to gradually improve over the year; however, GDP growth will remain fairly moderate. On an annual basis GDP growth is forecast to be 3.5% in 2010 and 3.8% in 2011. The CTC forecasts no change in US leisure travel volumes in 2010, and a moderate 0.4% gain in receipts.

US MC&IT

- US overnight MC&IT travel is Canada's second largest inbound market, after US overnight leisure travel;
- In 2009, there were 1.7 million overnight MC&IT US visitors, of which 1.0 million were over 45 years of age, nearly 60%;
- US business travellers spent $1.4 billion in 2009, a 15% drop over the previous year. However, among CTC core markets MC&IT visitors posted the highest average spend per night ($243);
- The volume of business travellers to Canada was evenly distributed across all four quarters in 2009;
- The top three activities for US MC&IT travellers were shopping, going to a bar or night club and sightseeing;
- Ontario, British Columbia, and Quebec posted the highest number of MC&IT visitors, despite declines of 9%, 8% and 13% respectively over 2008;
- The US economy appears to be turning around with Q1 2010 seeing economic growth by an annualized rate of 3.2%. In addition, the labour market brightened in April, supporting increased consumption in coming quarters. The CTC forecasts overnight business travel to Canada to improve by 4.7% in 2010, with total spending up 7.6% over 2009.

Mexico

- The Mexican long-haul market took a significant downturn in 2009, in large part due to an ailing economy, weakening peso, the H1N1 flu outbreak and the introduction of new visa requirements for Mexicans travelling to Canada. The momentum has swung from relatively upbeat in 2008 to more sombre in 2009;
- Mexico is Canada's eighth largest inbound market, going from the fastest growing market in 2008 to posting the largest decline (-37%) among CTC core markets in 2009;
- Mexican travellers injected $231.6 million into the Canadian economy in 2009, down 36% relative to 2008;
- In 2009, Mexican travellers spent on average $1,438 per person-trip, with an average trip length of 23 nights;
- Pleasure travel remained the most popular reason to visit Canada with a share of 42% in 2009, while visiting friends and relatives was the second most popular reason with a share of 25%;
- Spring and summer were the two most popular seasons among Mexican travellers in 2009, with 68% visiting during these periods;
- In 2009, proportions of Mexican travellers were almost evenly spread among the different age groups with travellers 24 years of age and under accounting for 24%, travellers between 35 and 44 for 22% and travellers between 45 and 54 for 20%;

- In 2009, Ontario and British Columbia were tied in attracting the most Mexican travellers with 69% of all Mexican visitors arriving via these two provinces;
- Mexican consumers appear to be more positive about current economic conditions and their ability to purchase big-ticket items. Mexico has seen strengthening economic activity by the end of 2009 and is expecting a 4.5% GDP growth in 2010 and 5.1% for 2011. The CTC forecasts overall arrivals from Mexico to decline 20.3% in 2010, with a rebound in 2012.

UK

- For the majority of 2009 the UK was in the grips of a deep recession, along with a housing market crisis and high unemployment. It was one of the last economies to emerge from the recession, with moderate GDP growth returning in the last three months of 2009. With the devaluation of the pound, long-haul travel became increasingly out of reach for many UK consumers;
- The UK is Canada's third largest inbound market, after US leisure and MC&IT. In 2009, the UK market posted the most significant decline in overnight visitors (-18%) among CTC European core markets, falling to 685,800 overnight trips;
- Visitors from the UK spent $892.2 million during their stay in Canada in 2009, a notable 25% decline over the previous year;
- In 2009, 45% of travellers from the UK were 55 years of age or older, with visiting friends and relatives (42%) remaining the predominant reason for UK travellers to visit Canada; however this was closely followed by pleasure travel (40%);
- Despite posting the third highest portion of friends and relatives (VFR) travel compared with CTC's other core markets, 29% of UK visitors stayed at a hotel during their entire stay in Canada;
- The majority of UK visitors enjoyed shopping (87%) and sightseeing (75%), followed by visiting friends and relatives, visiting parks, historical sites, and going to a bar or night club;
- The most popular provinces for travellers from the UK were Ontario, British Columbia and Alberta;
- The UK expects to see economic growth of just over 1%, with consumer confidence remaining fragile through 2010. The CTC forecasts UK trips to Canada to increase by 0.1% in 2010, with total receipts seeing a moderate decline of 0.5%.

France

- Like most major economies around the world, France's economy was severely distressed during 2009's global recession. However, despite high unemployment, France was better off than many of CTC's other core markets as a result of being sheltered by generous social programs and being a nation of savers who avoid high levels of personal debt;
- France is Canada's fourth largest inbound overnight market. In 2009, there were 388,000 visitors, with approximately half of these visitors over the age of 45;
- While there was a 5% decline in total spending by French visitors in Canada ($514.1 million), the average spend per night grew by 4% to $80;
- The average length of stay for visitors from France was 17 nights just under the average trip duration of CTC overseas core markets (excluding the US) of 18 nights;
- In 2009, pleasure and visiting friends and relatives (VFR) travel accounted for 81% of French visitors to Canada; Compared with 2008, the number of pleasure travellers declined 11%, while VFR travel increased by 19%;
- The most popular activities for France visitors included shopping, sightseeing, visiting friends or relatives, visiting historical sites, museums or art galleries and visiting national parks;
- In 2009, Quebec continued to be the most visited province, attracting 59% of all arrivals from France despite a 6% decline over 2008. Ontario was the second most popular Canadian destination, attracting 120,500 French visitors, an increase of 2.5% over the previous year;
- France is expected to continue its muted recovery into 2010 with GDP growth rising to 1.2% in 2010 and 1.7% in 2011. The CTC expects travel from France to grow by 4.7% with total spending while in Canada increasing 3.8% in 2010.

Germany

- In 2009, Germany saw an historic slump in economic activity, however by the end of the year it was emerging in relatively good shape. In comparison to other CTC core markets, Germany was able to avoid both a major financial imbalance and a housing market crash. However, as the Euro depreciated against the Canadian dollar, Canada became a relatively more expensive long-haul destination;
- In 2009, there were 291,400 German arrivals to Canada; 50% travelled for pleasure, while 25% travelled to visit friends and relatives;
- Visitors from Germany spent $443.1 million during their stay in Canada in 2009. Spending per trip by German travellers increased 3% reaching $1,520, well above the national average of $738;
- July to September was the most popular time for Germans to travel to Canada, with 46% of all arrivals coming during these three months;
- In 2009, Ontario and British Columbia were tied in attracting the most German travellers with 52% of all German arrivals. Yukon saw a 20% increase in the number of overnight German visitors in 2009, reaching 10,200 trips;
- Top activities for German travellers included shopping (82%), sightseeing (78%), visiting national parks (60%), followed by visiting friends and relatives, historic sites, and participating in sports and outdoor activities;
- The German economy is slowly gaining momentum and should outperform the rest of the euro zone in 2010 with its strong export base. Germany's GDP is expected to grow 1.5% in 2010 and 1.7% in 2011. In 2010, visitor arrivals are forecasted to improve by 6.2%, with spending growing by 5.4% in 2010.

Australia

- Australia was one of the few economies not to fall into a recession in 2009. While consumer confidence, job opportunities and the Australian dollar strengthened through the year, Australians also faced growing inflation;
- Australia is Canada's sixth largest inbound market and in 2009 surpassed Japan as CTC's top Asia Pacific market. There were 188,000 visitors from Australia in 2009, of which 43% were 55 years old or older;
- In 2009, there was a 5% increase in the average length of stay, reaching 14 nights compared to the national average of 7 nights;
- Visitors from Australia injected $310.3 million into Canada's economy in 2009, down 14% relative to the previous year. However, those who did travel to Canada spent on average $1,651 per trip, a 2% increase over 2008;
- In 2009, Australian travellers recorded the highest average spend per night ($118), after US MC&IT;
- Australia posted the highest proportion of pleasure travellers among CTC core markets, representing the main trip purpose for 61% of overnight visitors in 2009;
- While 62.5% of Australians visited Canada during the spring and summer months, there was a combined 2.8 point increase in the percentage of visitors during fall and winter months in 2009;
- British Columbia continued to be the preferred destination among Australian travellers, receiving more than twice as many travellers than its second place rival Ontario;
- Australia's economy is forecasted to continue to improve going into 2010 largely driven by a boom in housing construction, increases in public investment and exports and a resurgent China. Oxford Economics forecasts GDP to grow by 1.6% in both 2010 and 2011. Inbound Australian arrivals to Canada are expected to grow by 4.2% with total spending jumping 6.2% above 2009 levels.

Japan

- After enduring the worst economic slump in the post war era, the situation is finally looking up for Japan, the world's second largest economy. Economic sentiment has improved with Oxford Economics predicting GDP growth of 1.6% in 2010;
- Japan represents Canada's second largest Asia Pacific inbound travel market. In 2009, there were 180,300 visitors from Japan, down 30% over 2008. Long haul outbound travel from Japan in 2009 was influenced by concerns around the H1N1 flu outbreak, poor economic performance and increased interest in short haul travel opportunities;

- Japanese travellers spent a total of $268.7 million in Canada in 2009, making it Canada's second largest Asia Pacific market for expenditures;
- In 2009, the main purpose of travel to Canada by Japanese visitors was pleasure (44%), followed by visiting friends and relatives (VFR) at 24%;
- Summer remained the most popular season to visit Canada, with 36% of Japanese visitors in 2009 travelling during the months of July, August and September;
- By far the top two activities for Japanese travellers in 2009 included shopping (88%) and sightseeing (80%), with 50% of Japanese travellers saying that they visited a national or state nature park during their stay in Canada;
- Despite declines in volume, Ontario and British Columbia remained the most popular destinations for Japanese travellers in 2009;
- Japan's economy, is expected continue to improve going into 2010, although the pace of the recovery is likely to be slow. GDP is forecasted to grow to 1.6% in 2010 and is expected to maintain the same level in 2011. The CTC forecasts trip arrivals from Japan to rebound by 9.7% in 2010 with spending expected to grow by 12.3% over 2009.

South Korea

- In 2009, South Korea's travel industry was hit hard by the global economic slowdown with outbound travel declining for the majority of the year. Declines in income levels, a weakening currency and a struggling economy shook South Korean consumer confidence;
- In 2009, the largest proportion of South Korean visitors were 24 years of age or under, representing almost 30% of the 131,300 South Koreans who visited Canada in 2009;
- The main trip purpose for 64% of South Korean visitors was to visit friends and relatives and for "other" purposes suggesting that a high proportion of South Koreans visitors are students whose families come and visit during their stay in Canada. The average length of stay was 26 nights, the second highest among CTC core markets in 2009;
- South Korean travellers injected $218.4 million into the Canadian economy in 2009, down 21% compared to 2008. South Korean travellers spent on average $1,663 per person-trip;
- The majority of South Koreans visited during July through September (36%), while spring (April to June) remained the second most popular time to visit with 25% of Koreans visiting during this time;
- British Columbia was the most popular destination, followed by Ontario and Alberta;
- The top activities were shopping (92%), sightseeing (77%) and visiting friends and relatives (63%);
- South Korea's economy is recovering and expected to improve throughout 2010 with GDP rising to 5.1%. The CTC forecasts South Korean trips to grow by 4.6% in 2010, and for total spend in increase 6.4% reaching $137.3 million.

China

- The world's fastest growing major economy for the last three decades, China managed to sail through the global economic crisis relatively unscathed. Despite outbound travel being influenced by the H1N1 outbreak, China was the only CTC core market to post a moderate increase in trip volume to Canada, up 0.4% over 2008, reaching 159,400 trips;
- Chinese travellers spent $260.6 million on their trips to Canada in 2009, slightly down 0.9% compared to 2008. On average they spent $1,634 per person-trip and stayed an average of 28 nights;
- Visiting friends and relatives remained the predominant reason for Chinese visitors to travel to Canada accounting for 44% of all visitors in 2009. Not surprisingly, travelling for pleasure represented the smallest share (12%) of Chinese visitors;
- In 2009, Chinese travellers preferred to visit Canada in the summer accounting for 35% of Chinese arrivals, while the spring was the second most popular season for travel with a 25% share;
- In 2009, almost 50% of Chinese travellers who visited Canada were over the age of 45; with the number of visitors between the age of 45 and 54 increasing by 35% over 2008;

- All three of the top provincial destinations posted increases in Chinese arrivals in 2009, with Quebec posting the largest gain of 18%, followed by Ontario and British Columbia up 7% and 2% respectively over 2008;
- Top activities included shopping (91%), sightseeing (78%), and visiting friends and relatives (76%);
- The upbeat economic momentum is expected to prevail in China, supported by strong domestic demand and GDP growth reaching 9.0% in 2010 and 8.8% in 2011. CTC expects to see a 3.5% increase in arrival from China in 2010 with 1.2% gain in total receipts over 2009.

India

- India continued to be one of the fastest growing economies in 2009, despite the global economic slowdown. India's economy benefitted from strong Government stimulus spending, along with cuts to interest rates. However, inflation continues to be a concern, with the International Monetary Fund forecasting inflation to reach 13.2% from an estimated 10.9% in 2009;
- India is one of Canada's emerging inbound travel markets. In 2009, 51% of the 126,000 visitors from India were over 45 years of age or older;
- The average length of stay was 21 nights, compared with an average of 18 nights among CTC core overseas markets (excluding the US);
- Visitors from India spent 102.9 million during their stay in Canada, a moderate 1.1% decline over the previous year. While India posted one of the lowest average spend per night of $45, this was up 3.7% over 2008;
- The main purpose for travelling to Canada in 2009 was to visit friends and relatives (48%), followed by business and pleasure travel (both receiving 21% of all Indian arrivals);
- Over 70% of all Indian visitors enjoyed shopping, sightseeing, and visiting friends and relatives in 2009. A noted 48% visited national or state nature parks during their stay in Canada, a 7 percentage point increase over 2008;
- Approximately 57% of all Indian visited Ontario while 23% went to British Columbia. Over the last year the number of visits to Ontario has dipped 5 percentage points while British Columbia has seen an increase of 2 percentage points;
- India, an emerging economy, has witnessed unprecedented levels of economic expansion, along with countries such as China, Russia, Mexico and Brazil. With the economic pace picking up globally, India expects overall GDP to expand by 7.8% in 2010 and 9.0% in 2011;
- In 2010, the CTC forecasts a 6.1% increase in the total number of Indian visitors, reaching approximately 133,700 overnight trips.

Brazil

- Brazil was one of the first economies in 2009 to begin its recovery, emerging from a short recession in the second quarter of 2009. GDP contracted 0.2% in 2009, largely driven by weak domestic consumption and investment in the start of the year. However, by year end, employment and economic activity were improving;
- Brazil was the smallest inbound market among CTC core markets in 2009 with 56,700 visitors in total, a 19% decline over 2008;
- The summer months (July to September) proved to be the most popular for Brazilian travellers visiting Canada, accounting for 32% of total trips. However, spring and fall months were almost as popular at 25% and 23% respectively;
- There were two main age groups in 2009 of similar size, accounting for 69% of total Brazilian arrivals. Those between the ages of 25-34 represented 34% of travellers, while those in the 55 year and older accounted for 35% of the total number of Brazilian visitors;
- In 2009, the majority of Brazilian travellers stayed with friends and relatives (32%) while in Canada, followed by at a hotel (22%), with 13% staying at a combination of accommodation types;

- Visitors from Brazil spent $97.6 million on trips to Canada in 2009, spending on average $1,719 per trip; a 10% increase over 2008 and the highest average spend per trips among all of CTC's core markets;
- Top activities included shopping (97%), sightseeing (80%) and visiting national or state nature parks (64%);
- Ontario, British Columbia, Quebec and Alberta were the provinces most visited by travellers from Brazil. Nearly 55% visited Ontario, a 6 percentage point drop over 2008. In second place, British Columbia attracted 18% of all travellers from Brazil a 7 percentage point jump from the previous year;
- Inbound arrivals from Brazil are expected to grow by 12.3% in 2010, with total spending increasing by 14.0% over 2009.