



Tourism snapshot

3rd edition
(revised version)

Year-in-review

2008
Facts & figures

Tourism highlights

- Tourism spending in Canada totaled \$74.7 billion in 2008, a 5.5% increase compared to 2007.
- Canadian residents accounted for 79% or \$59.1 billion, while foreigners spent \$15.7 billion or 21%.
- Total tourism Gross Domestic Product (GDP) reached \$30.3 billion in 2008 or 2.0% of Canada's GDP.
- Canada's international travel account deficit was at \$12.6 billion in 2008. The deficit has increased every year since 2002, from its low of \$1.7 billion to its current high.
- Employment in Canada's tourism sector reached 662,900 jobs in 2008, for an increase of 1.4% over the previous year.
- Trips taken by overseas residents increased by 2.1% to 4.5 million, stemming from a strong Canadian dollar over the first three quarters of 2008 and a disturbed global environment as a result of a struggling US economy.
- In total, foreign residents made 17.0 million overnight trips to Canada in 2008, a 4.4% decline over 2007.

Overnight Trips to Canada

| | Trips '000 | 08/07 % | Spending \$ B | 08/07 % |
|---|---------------|-------------|------------------|-------------|
| Americas | | | | |
| United States Leisure | 10,571 | -7.5 | 5.0 | -9.0 |
| United States MC & IT | 1,932 | -1.0 | 1.6 | 3.4 |
| Total United States | 12,503 | -6.5 | 6.6 | -6.3 |
| Mexico | 257 | 11.7 | 0.4 | 21.0 |
| Total Americas | 12,760 | -6.2 | 7.0 | -5.1 |
| America's* Proportion of all countries % | 75.1 | | 54.1 | |
| Overseas | | | | |
| United Kingdom | 837 | -6.4 | 1.2 | -3.5 |
| France | 404 | 12.5 | 0.5 | 13.3 |
| Germany | 315 | 5.6 | 0.5 | 10.6 |
| Japan | 259 | -16.6 | 0.4 | -11.5 |
| South Korea | 173 | -7.8 | 0.3 | 0.4 |
| China | 159 | 5.3 | 0.3 | 2.0 |
| Australia | 219 | 5.6 | 0.4 | 10.3 |
| Total Overseas Core Markets | 2,366 | -1.7 | 3.4 | 1.7 |
| Overseas Core Markets' Proportion of all countries % | 13.9 | | 26.6 | |
| Other Overseas Countries | 1,870 | 6.2 | 2.5 | 6.0 |
| Other Overseas Countries' proportion of all countries % | 11.0 | | 19.3 | |
| Total Countries | 16,997 | -4.4 | 13.0 | -1.3 |

Tourism in the Canadian Economy

| | \$ billions | 08/07 % |
|---------------------|-------------|------------|
| Total Demand | 74.7 | 5.5 |
| Domestic | 59.1 | 8.2 |
| International | 15.7 | -3.6 |
| Tourism GDP | 30.3 | 5.8 |

Source: Statistics Canada, National Tourism Indicators

Canada's International Travel Account (\$ billions)

| | All Countries | U.S. | Overseas |
|----------------|---------------|-------------|-------------|
| Receipts | 16.2 | 7.7 | 8.6 |
| Payments | 28.9 | 16.5 | 12.4 |
| Balance | -12.6 | -8.9 | -3.8 |

Source: Statistics Canada, International Travel Account

*Figures may not add up exactly due to rounding

Source: Statistics Canada, International Travel Survey, revised August 27th, 2009.

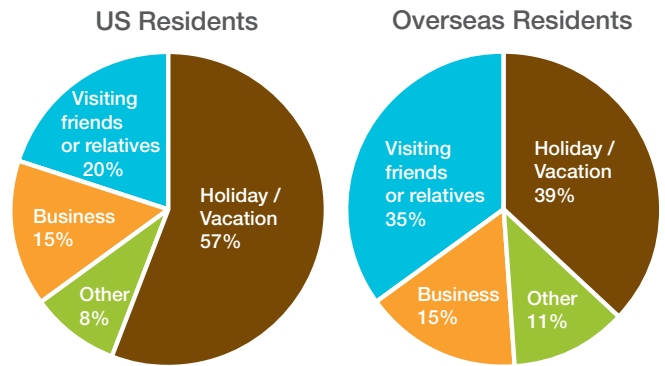
*Refers to CTC's marketing group in the U.S. and Mexico

Top Ten Overseas Countries Visited by Canadians

| | Visits '000 | Nights '000 | Spending \$ millions |
|--------------------|-------------|-------------|----------------------|
| Mexico | 1,124.5 | 11,517.6 | 1,185.9 |
| United Kingdom | 1,017.1 | 12,405.8 | 1,226.7 |
| Cuba | 931.8 | 7,805.5 | 791.1 |
| France | 808.5 | 9,778.9 | 1,057.2 |
| Dominican Republic | 762.8 | 6,318.9 | 651.3 |
| Germany | 362.0 | 3,333.2 | 312.5 |
| Italy | 338.2 | 3,470.6 | 455.5 |
| Netherlands | 273.5 | 2,172.9 | 212.3 |
| China | 249.6 | 5,402.5 | 451.5 |
| Spain | 215.5 | 2,261.4 | 266.0 |

Source: Statistics Canada, International Travel Survey, revised August 27th, 2009

Distribution of International Tourists to Canada by Purpose



Source: Statistics Canada, International Travel Survey, revised August 27th, 2009

Note: Percentages are rounded numbers

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.

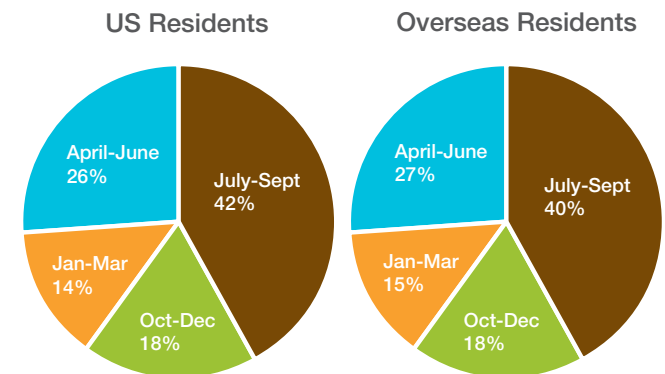
Volume of International Travelers - With the help of Canada Border Services Agency, all ports of entry across Canada participate in collecting monthly census counts of vehicles and passengers entering or re-entering Canada by country of residence and mode.

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.canadatourism.com

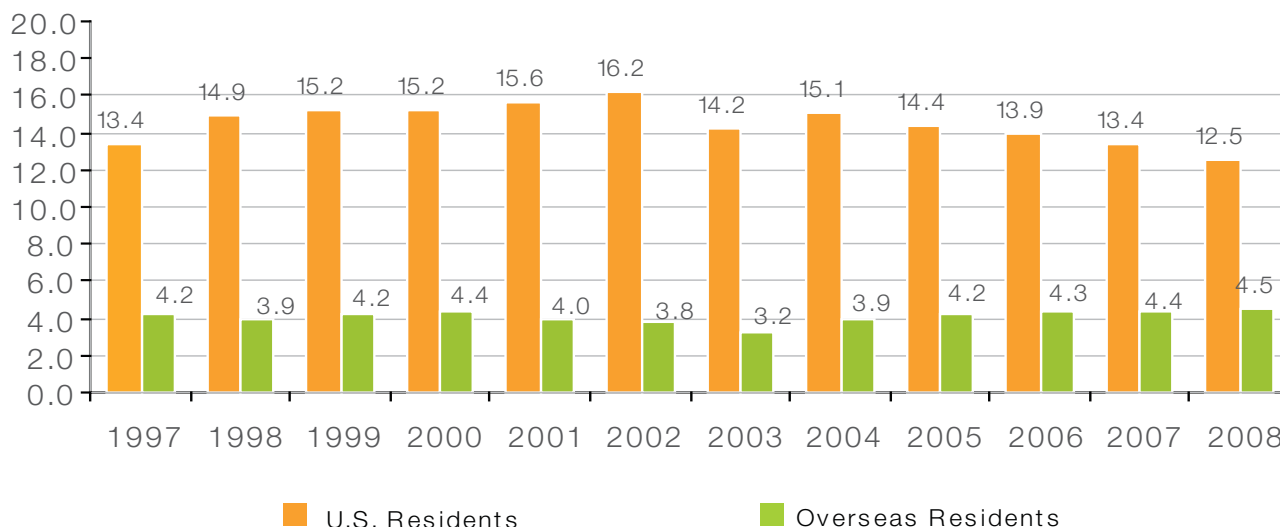
Distribution of International Tourists to Canada by Quarter



Source: Statistics Canada, International Travel Survey, revised August 27th, 2009

Note: Percentages are rounded numbers

International Tourists to Canada, overnight trips (millions)



Source: Statistics Canada, International Travel Survey, revised August 27th, 2009

International Travel Competitive Review (000's)

| Trips from: | Overnight trips to: | | | | | | | |
|-----------------------------|---------------------|----------------|---------------|----------------|--------------|----------------|----------------|----------------|
| | Canada | | United States | | Australia | | United Kingdom | |
| | # | 08/07 % Change | # | 08/07 % Change | # | 08/07 % Change | # | 08/07 % Change |
| Total International | 16,997 | -4 | 50,502 | 4 | 5,586 | -1 | 33,745 | 3 |
| Americas | | | | | | | | |
| United States | 12,503 | -7 | ... | ... | 454 | -1 | 3,751 | -4 |
| Mexico ¹ | 257 | 12 | 6,235 | -7 | ... | ... | 61 | -31 |
| Overseas Key Markets | | | | | | | | |
| France | 405 | 13 | 1,244 | 25 | 85.6 | 16 | 3,399 | -8 |
| Germany | 315 | 6 | 1,782 | 17 | 161 | 6 | 3,463 | 2 |
| United Kingdom | 837 | -6 | 4,565 | 1 | 672 | -2 | ... | ... |
| China* | 159 | 5 | 493 | 24 | 356 | 0 | 191 | 35 |
| Japan | 259 | -17 | 3,250 | -8 | 457 | -20 | 332 | -3 |
| South Korea | 173 | -8 | 759 | -6 | 218 | -14 | ... | ... |
| Australia | 219 | 6 | 690 | 3 | ... | ... | 1,007 | 5 |
| Canada | ... | ... | 18,925 | 7 | 125 | 9 | 895 | 3 |
| Total Key Markets | 15,127 | -6 | 37,943 | 3 | 2,598 | -3 | 13,099 | -2 |

...Data not available. ¹Arrivals to the interior only (US Statistics). *US statistics includes Hong Kong, SAR. Note: Statistics Canada preliminary estimates.

Sources: Statistics Canada (revised August 27th, 2009); Australian Bureau of Statistics; National Statistics (UK); and ITA, Office of Travel and Tourism Industries (USA).

| | CTC Core International Markets - Travellers' Characteristics | | | | Americas | | | | | | | |
|---|--|---------|------------------------|---------|----------|---------|------------|---------|---------|---------|---------|---------|
| | Total International Markets | 08/07 % | Total CTC Core Markets | 08/07 % | US | 08/07 % | US Leisure | 08/07 % | MC&IT | 08/07 % | Mexico | 08/07 % |
| Overnight Person-Trips (000's) | 16,997.1 | -4.4 | 15,126.9 | -5.5 | 12,503.2 | -6.5 | 10,570.7 | -7.5 | 1,932.4 | -1.0 | 257.2 | 11.7 |
| Overnight Travel Spending (\$M) | 12,948.5 | -1.3 | 10,444.4 | -3.0 | 6,638.5 | -6.3 | 5,019.4 | -9.0 | 1,619.1 | 3.4 | 363.9 | 21.0 |
| Average Party Size | 1.9 | -2.2 | 1.9 | -1.7 | 2.0 | -1.0 | 2.3 | 6.0 | 1.4 | 0.0 | 1.4 | -9.0 |
| Average Trip Duration (Nights) | 7.5 | 7.1 | 6.3 | 6.0 | 4.1 | 2.0 | 4.3 | 6.6 | 3.3 | 6.1 | 19.9 | 8.5 |
| Average Spending per Trip (\$) | 761.8 | 3.2 | 690.5 | 2.7 | 531.0 | 0.3 | 474.8 | 13.8 | 837.9 | 4.5 | 1,415.2 | 8.3 |
| Average Spending per Person-Night (\$) | 102.1 | -3.6 | 110.2 | -3.1 | 129.2 | -1.6 | 111.5 | 4.9 | 254.7 | -1.5 | 71.3 | -0.2 |
| Seasonality (000's) | | | | | | | | | | | | |
| 1 st Quarter | 2,406.7 | -1.9 | 2,148.4 | -2.5 | 1,726.9 | -3.5 | 1,277.9 | -5.4 | 449.0 | 2.2 | 47.6 | 29.3 |
| 2 nd Quarter | 4,528.4 | -4.6 | 3,995.7 | -6.2 | 3,303.9 | -8.0 | 2,751.1 | -9.3 | 552.8 | -1.2 | 66.0 | 10.4 |
| 3 rd Quarter | 7,018.8 | -4.7 | 6,277.9 | -5.8 | 5,222.6 | -6.8 | 4,714.1 | -7.5 | 508.5 | 0.5 | 100.7 | 11.8 |
| 4 th Quarter | 3,043.1 | -5.3 | 2,704.8 | -6.3 | 2,249.7 | -5.9 | 1,827.5 | -6.0 | 422.2 | -5.7 | 42.9 | -1.2 |
| Main Trip Purpose (000's) | | | | | | | | | | | | |
| Business | 2,625.7 | 1.5 | 2,336.8 | 1.0 | 1,932.4 | -1.0 | 0.0 | N/A | 1,932.4 | -1.0 | 49.0 | 40.0 |
| VFR | 4,074.7 | -1.4 | 3,294.6 | -3.5 | 2,498.8 | -4.4 | 2,498.8 | -4.4 | 0.0 | N/A | 70.3 | 33.4 |
| Pleasure | 8,832.3 | -8.2 | 8,254.0 | -8.6 | 7,106.0 | -8.8 | 7,106.0 | -8.8 | 0.0 | N/A | 93.0 | -13.9 |
| Other | 1,464.3 | 1.7 | 1,241.4 | -1.2 | 965.9 | -5.2 | 965.9 | -5.2 | 0.0 | N/A | 44.9 | 30.1 |
| Gender (%) | | | | | | | | | | | | |
| Male | 51.2 | 0.0 | 51.1 | -0.0 | 51.0 | -0.1 | 47.9 | -0.3 | 67.8 | -0.6 | 53.2 | 2.2 |
| Female | 48.8 | 0.0 | 48.9 | 0.0 | 49.0 | 0.1 | 52.1 | 0.3 | 32.2 | 0.6 | 46.8 | -2.2 |
| Age (000's) | | | | | | | | | | | | |
| 24 & Under | 2,415.2 | -0.1 | 2,126.5 | -1.4 | 1,635.2 | -3.9 | 1,562.1 | -39.3 | 73.1 | 25.4 | 75.0 | 27.6 |
| 25-34 | 1,815.1 | -2.2 | 1,515.0 | -4.0 | 1,088.1 | -6.0 | 868.7 | -8.6 | 219.4 | 5.8 | 46.5 | 21.4 |
| 35-44 | 2,440.6 | -8.4 | 2,119.8 | -9.6 | 1,711.9 | -10.7 | 1,315.7 | -11.6 | 396.2 | -7.6 | 49.6 | 1.2 |
| 45-54 | 3,028.1 | -6.5 | 2,698.2 | -7.2 | 2,272.8 | -7.7 | 1,717.9 | -7.7 | 554.9 | -7.8 | 41.4 | 27.0 |
| 55+ | 6,125.9 | -3.9 | 5,571.1 | -5.1 | 4,759.9 | -5.9 | 4,213.9 | -7.4 | 546.0 | 8.1 | 40.1 | -4.3 |
| Accommodation Types (000's Person-Trips) | | | | | | | | | | | | |
| Hotel Only | 6,541.6 | -5.8 | 6,093.0 | -6.4 | 5,214.5 | -5.8 | 3,666.7 | -7.7 | 1,547.8 | -0.8 | 104.4 | -4.7 |
| Motel Only | 1,204.8 | -8.7 | 1,182.1 | -9.4 | 1,153.5 | -9.6 | 1,061.7 | -9.3 | 91.8 | -12.6 | 1.8 | -10.0 |
| Home of Friends or Relatives Only | 3,369.9 | -0.7 | 2,627.7 | -4.0 | 1,971.2 | -7.2 | 1,937.2 | -7.2 | 34.0 | -7.9 | 65.7 | 14.5 |
| Camping or Trailer Park Only | 371.3 | -19.4 | 359.0 | -19.8 | 341.9 | -19.5 | 335.4 | -20.8 | 6.5 | 306.3 | 1.8 | 38.5 |
| Cottage or Cabin Only | 988.4 | -2.8 | 980.5 | -2.7 | 953.9 | -4.1 | 943.7 | -4.5 | 10.2 | 56.9 | 2.6 | 23.8 |
| Hotel & Motel | 255.4 | -10.4 | 241.3 | -7.5 | 205.4 | -7.4 | 161.4 | -10.4 | 44.0 | 5.8 | 0.0 | N/A |
| Other Combinations of Two or More Types | 1,747.4 | -2.5 | 1,480.8 | -2.0 | 981.3 | -5.3 | 937.7 | -5.0 | 43.5 | -11.2 | 32.4 | 40.9 |
| Activities (000's) | | | | | | | | | | | | |
| Visit Friends or Relatives | 6,739.9 | -2.3 | 5,460.8 | -4.4 | 4,005.2 | -5.1 | 3,778.8 | -5.4 | 226.4 | 0.3 | 122.2 | 12.3 |
| Attend a Festival or Fair | 1,790.8 | 4.3 | 1,433.2 | -1.6 | 950.7 | -12.8 | 894.1 | -12.2 | 56.6 | -21.4 | 66.3 | 45.1 |
| Attend Cultural Events | 2,096.7 | -1.9 | 1,786.6 | -5.9 | 1,379.7 | -10.8 | 1,299.6 | -11.1 | 80.1 | -6.2 | 52.2 | 36.6 |
| Visit a Zoo, Aquarium/Botanical Garden | 2,604.0 | -0.9 | 2,152.8 | -1.9 | 1,414.8 | -5.9 | 1,331.3 | -7.1 | 83.4 | 17.0 | 85.1 | 22.6 |
| Visit a Historic Site | 5,524.9 | -3.7 | 4,727.2 | -5.4 | 3,556.2 | -8.2 | 3,215.6 | -9.0 | 340.7 | 0.0 | 124.4 | 11.5 |
| Go Shopping | 11,057.0 | -5.4 | 9,404.7 | -7.2 | 7,114.0 | -9.0 | 6,382.8 | -9.8 | 731.2 | -1.3 | 232.6 | 12.3 |
| Go Sightseeing | 9,554.7 | -5.3 | 8,238.4 | -6.7 | 6,192.6 | -8.6 | 5,596.0 | -9.7 | 596.6 | 2.3 | 186.2 | 10.8 |
| Go to a Bar or Night Club | 4,141.5 | -2.1 | 3,649.7 | -3.1 | 2,763.4 | -5.4 | 2,165.4 | -6.7 | 598.0 | -0.3 | 83.0 | 20.6 |
| Visit a Museum or Art Gallery | 4,295.9 | -3.6 | 3,679.1 | -5.1 | 2,646.1 | -7.9 | 2,423.7 | -9.0 | 222.4 | 7.1 | 104.6 | 1.5 |
| Visit a National or State Nature Park | 5,023.0 | -4.4 | 4,180.6 | -5.9 | 2,730.2 | -11.1 | 2,551.9 | -11.9 | 178.3 | 2.8 | 117.9 | 11.0 |
| Participate in Sports/Outdoor Activities | 4,845.3 | -6.7 | 4,436.2 | -7.9 | 3,622.9 | -8.4 | 3,452.7 | -8.4 | 170.2 | -8.4 | 61.9 | 6.0 |
| Provinces Visited (000's) | | | | | | | | | | | | |
| Newfoundland | 69.3 | -4.7 | 61.9 | 1.5 | 50.9 | 3.0 | 41.8 | -2.6 | 9.1 | 40.0 | N/A | N/A |
| Prince Edward Island | 161.3 | -4.8 | 151.7 | -3.6 | 121.7 | -8.4 | 118.9 | -9.2 | 2.8 | 47.4 | N/A | N/A |
| Nova Scotia | 464.6 | -4.1 | 398.1 | -6.6 | 307.3 | -7.8 | 285.3 | -7.8 | 22.0 | -6.8 | 3.5 | 84.2 |
| New Brunswick | 402.3 | -4.5 | 383.7 | -4.7 | 343.2 | -4.2 | 325.4 | -4.7 | 17.8 | 6.0 | 2.1 | N/A |
| Quebec | 3,007.7 | -1.3 | 2,535.0 | -4.1 | 1,842.2 | -7.0 | 1,498.7 | -7.3 | 343.5 | -5.5 | 89.4 | 6.7 |
| Ontario | 8,269.6 | -4.0 | 7,276.4 | -5.3 | 6,224.9 | -5.5 | 5,243.2 | -5.9 | 981.7 | -3.5 | 122.0 | 9.2 |
| Manitoba | 318.4 | -10.5 | 290.6 | -10.4 | 246.9 | -7.8 | 218.3 | -8.3 | 28.6 | -3.7 | 2.5 | -47.9 |
| Saskatchewan | 202.9 | -3.3 | 183.6 | -4.4 | 140.9 | -10.7 | 122.3 | -15.5 | 18.6 | 43.1 | 1.1 | -21.4 |
| Alberta | 1,667.5 | -5.3 | 1,371.7 | -7.3 | 857.0 | -8.9 | 616.8 | -16.8 | 240.2 | 20.3 | 11.4 | -18.0 |
| British Columbia | 4,610.1 | -6.4 | 4,102.7 | -7.3 | 3,127.2 | -8.1 | 2,798.1 | -8.9 | 329.1 | -0.8 | 82.3 | 20.1 |
| Yukon | 212.2 | -29.3 | 201.2 | -29.0 | 180.6 | -29.0 | 174.8 | -25.0 | 5.8 | -73.0 | 0.5 | 66.7 |
| Northwest Territories | 29.1 | -7.3 | 27.8 | 16.8 | 17.0 | 3.0 | 15.8 | 26.4 | 1.2 | -70.0 | N/A | N/A |

Notes: 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, revised August 27, 2009

| | Overseas | | | | | | | | | | | | | |
|---|----------|---------|---------|---------|---------|---------|---------|---------|---------|---------|-----------|---------|---------|---------|
| | UK | 08/07 % | France | 08/07 % | Germany | 08/07 % | Japan | 08/07 % | China | 08/07 % | Australia | 08/07 % | S Korea | 08/07 % |
| Overnight Person-trips (000's) | 836.9 | -6.4 | 404.5 | 12.5 | 315.4 | 5.6 | 258.9 | -16.6 | 158.7 | 5.3 | 219.3 | 5.6 | 172.7 | -7.8 |
| Overnight Travel Spending (\$M) | 1,183.8 | -3.5 | 541.0 | 13.3 | 466.2 | 10.6 | 356.1 | -11.5 | 262.9 | 2.0 | 355.8 | 10.3 | 276.1 | 0.4 |
| Average Party Size | 1.7 | -5.7 | 1.6 | 0.6 | 1.6 | -3.1 | 1.4 | -2.1 | 1.4 | 2.3 | 1.7 | 1.2 | 1.3 | -3.0 |
| Average Trip Duration (Nights) | 13.6 | 7.3 | 17.3 | 6.8 | 16.7 | 3.2 | 12.0 | 9.6 | 28.0 | 2.9 | 13.4 | 1.4 | 24.2 | 5.1 |
| Average Spending per Trip (\$) | 1,414.6 | 3.1 | 1,337.3 | 0.7 | 1,478.3 | 4.7 | 1,375.8 | 6.2 | 1,656.1 | -3.2 | 1,622.5 | 4.4 | 1,598.0 | 8.9 |
| Average Spending per Person-Night (\$) | 104.2 | -3.9 | 77.1 | -5.7 | 88.8 | 1.5 | 114.8 | -3.1 | 59.2 | -6.0 | 121.2 | 2.9 | 66.2 | 3.6 |
| Seasonality (000's) | | | | | | | | | | | | | | |
| 1 st Quarter | 141.4 | 0.2 | 58.5 | 0.3 | 35.3 | -6.4 | 42.9 | -18.0 | 26.6 | 18.8 | 35.1 | 14.3 | 34.1 | -1.4 |
| 2 nd Quarter | 232.1 | 1.0 | 89.5 | 16.8 | 87.8 | 13.0 | 66.2 | -16.6 | 41.8 | 12.1 | 62.9 | 3.6 | 45.5 | 1.8 |
| 3 rd Quarter | 324.8 | -9.7 | 187.6 | 18.6 | 144.6 | 0.9 | 95.4 | -13.9 | 56.5 | -1.2 | 80.1 | 10.3 | 65.6 | -8.3 |
| 4 th Quarter | 138.6 | -15.1 | 68.9 | 4.1 | 47.7 | 19.5 | 54.3 | -20.1 | 33.9 | 0.3 | 41.2 | -5.5 | 27.6 | -24.8 |
| Main Trip Purpose (000's) | | | | | | | | | | | | | | |
| Business | 110.9 | 22.3 | 55.7 | 14.8 | 62.6 | 20.6 | 37.2 | -15.5 | 32.0 | -26.4 | 29.8 | 68.4 | 27.2 | -12.8 |
| VFR | 278.6 | -7.2 | 118.9 | 8.5 | 77.7 | 11.3 | 61.5 | -28.4 | 73.8 | 19.2 | 52.6 | 7.3 | 62.4 | -13.0 |
| Pleasure | 399.3 | -11.9 | 195.3 | 8.8 | 154.0 | -3.0 | 126.3 | -16.4 | 23.0 | -6.1 | 127.6 | -0.8 | 29.5 | -14.5 |
| Other | 48.1 | -3.0 | 34.5 | 59.0 | 21.1 | 16.6 | 33.9 | 14.5 | 30.0 | 43.5 | 9.4 | -24.2 | 53.6 | 7.2 |
| Gender (%) | | | | | | | | | | | | | | |
| Male | 49.1 | 0.7 | 52.7 | -0.3 | 55.9 | -1.0 | 46.0 | 2.9 | 57.3 | -4.6 | 48.9 | 2.3 | 57.5 | 0.6 |
| Female | 50.9 | -0.7 | 47.3 | 0.3 | 44.1 | 1.0 | 54.0 | -2.9 | 42.7 | 4.6 | 51.1 | -2.3 | 42.5 | -0.6 |
| Age (000's) | | | | | | | | | | | | | | |
| 24 & Under | 115.9 | -0.4 | 79.5 | 12.1 | 54.4 | 8.8 | 51.0 | -1.0 | 28.9 | 24.6 | 32.8 | -15.7 | 53.8 | 20.1 |
| 25-34 | 108.2 | -0.3 | 72.9 | 21.9 | 48.1 | -8.7 | 55.7 | -27.2 | 26.9 | 26.9 | 28.3 | 14.1 | 40.3 | 3.9 |
| 35-44 | 119.2 | -15.2 | 48.5 | 2.8 | 74.0 | 24.8 | 35.6 | 8.9 | 30.1 | -22.0 | 15.4 | -16.3 | 35.5 | -16.7 |
| 45-54 | 146.5 | -2.7 | 65.1 | 5.5 | 58.3 | 6.2 | 29.7 | -38.5 | 28.7 | -6.8 | 29.8 | -14.1 | 25.9 | -19.3 |
| 55+ | 331.3 | -7.3 | 129.5 | 17.5 | 74.3 | -1.6 | 72.8 | -15.8 | 41.8 | 27.4 | 106.8 | 26.4 | 14.6 | -34.8 |
| Accommodation Types (000's Person-Trips) | | | | | | | | | | | | | | |
| Hotel Only | 384.8 | -12.4 | 87.7 | 8.5 | 104.6 | 19.3 | 141.7 | -23.5 | 41.4 | -19.8 | 81.9 | -13.9 | 32.0 | -23.3 |
| Motel Only | 9.8 | 36.1 | 3.6 | 33.3 | 6.9 | 56.8 | 1.9 | 171.4 | 1.3 | -74.0 | 2.7 | -50.0 | 0.6 | -70.0 |
| Home of Friends or Relatives Only | 220.7 | -2.5 | 84.6 | 16.4 | 57.0 | 0.9 | 37.1 | 22.4 | 72.4 | 25.3 | 49.0 | 56.1 | 70.0 | 10.9 |
| Camping or Trailer Park Only | 0.6 | -73.9 | 2.7 | -53.4 | 7.6 | -37.2 | 0.0 | N/A | 0.0 | N/A | 4.4 | 340.0 | 0.0 | N/A |
| Cottage or Cabin Only | 7.2 | 84.6 | 2.9 | 262.5 | 4.3 | 126.3 | 1.5 | 150.0 | 1.0 | 100.0 | 6.2 | 195.2 | 0.9 | 80.0 |
| Hotel & Motel | 14.5 | -8.2 | 10.4 | 141.9 | 5.1 | -16.4 | 0.0 | N/A | 0.0 | N/A | 3.5 | -31.4 | 2.4 | -45.5 |
| Other Combinations of Two or More Types | 152.7 | 2.6 | 129.1 | 0.5 | 86.0 | 2.3 | 21.8 | -19.9 | 14.2 | 46.4 | 32.8 | 32.3 | 30.5 | 5.9 |
| Activities (000's) | | | | | | | | | | | | | | |
| Visit Friends or Relatives | 499.7 | -8.4 | 246.2 | 4.8 | 143.0 | -2.0 | 104.9 | -21.7 | 110.7 | 17.3 | 116.7 | 13.1 | 112.2 | -9.6 |
| Attend a Festival or Fair | 152.5 | 27.9 | 92.0 | 27.2 | 44.9 | 52.2 | 32.8 | 5.1 | 29.1 | 89.0 | 33.4 | 67.8 | 31.5 | -2.5 |
| Attend Cultural Events | 130.0 | 14.2 | 88.3 | 14.7 | 41.8 | 11.2 | 23.3 | -6.4 | 11.3 | -2.6 | 36.1 | 49.8 | 23.9 | -4.0 |
| Visit a Zoo, Aquarium/Botanical Garden | 216.9 | -3.3 | 156.1 | 19.0 | 90.5 | 18.5 | 42.3 | -7.6 | 32.1 | 13.0 | 83.7 | 0.4 | 31.3 | -4.3 |
| Visit a Historic Site | 365.9 | -4.9 | 230.2 | 21.5 | 162.1 | 6.9 | 75.4 | 15.8 | 51.3 | -10.8 | 113.0 | 0.6 | 48.7 | -2.6 |
| Go Shopping | 735.3 | -9.3 | 349.8 | 12.0 | 266.5 | 10.8 | 226.6 | -18.2 | 138.9 | 5.3 | 187.1 | 2.0 | 153.9 | -2.4 |
| Go Sightseeing | 635.0 | -8.8 | 293.1 | 12.0 | 255.2 | 10.9 | 218.4 | -16.1 | 132.8 | 11.5 | 188.3 | 11.2 | 136.8 | -8.1 |
| Go to a Bar or Night Club | 374.3 | 3.1 | 162.9 | 15.4 | 84.8 | -4.0 | 47.3 | 4.2 | 22.9 | -7.7 | 73.7 | -22.3 | 37.4 | 90.8 |
| Visit a Museum or Art Gallery | 312.9 | -5.8 | 221.1 | 23.3 | 117.1 | -1.2 | 78.8 | 1.3 | 38.8 | 10.2 | 99.9 | 0.6 | 59.8 | -0.5 |
| Visit a National or State Nature Park | 444.7 | -5.5 | 219.4 | 21.1 | 206.6 | 17.5 | 141.9 | -2.7 | 80.7 | 37.5 | 144.4 | 13.6 | 94.8 | -11.3 |
| Participate in Sports/Outdoor Activities | 291.7 | -11.1 | 147.7 | 4.8 | 107.4 | -6.5 | 53.9 | -22.3 | 19.4 | 16.2 | 77.7 | -8.3 | 53.6 | 12.1 |
| Provinces Visited (000's) | | | | | | | | | | | | | | |
| Newfoundland | 4.3 | 10.3 | 1.6 | -51.5 | 3.5 | 52.2 | 0.7 | N/A | 0.5 | N/A | N/A | N/A | 0.4 | 33.3 |
| Prince Edward Island | 6.2 | 3.3 | 1.4 | -48.1 | 7.7 | 185.2 | 8.7 | 16.0 | 1.3 | 30.0 | 1.4 | -56.3 | 3.3 | 153.8 |
| Nova Scotia | 40.9 | -17.7 | 10.2 | 137.2 | 23.8 | 3.0 | 2.9 | -19.4 | 0.6 | -64.7 | 7.1 | -6.6 | 1.8 | 38.5 |
| New Brunswick | 14.6 | -33.0 | 8.3 | 20.3 | 9.7 | -1.0 | 1.6 | 700.0 | 2.7 | -10.0 | 1.1 | -21.4 | 0.4 | -63.6 |
| Quebec | 122.3 | -2.9 | 312.6 | 11.2 | 72.3 | 8.7 | 36.1 | 9.1 | 14.2 | -48.2 | 33.3 | 20.2 | 12.6 | -22.2 |
| Ontario | 356.3 | -10.5 | 117.6 | 5.3 | 125.0 | 4.6 | 129.4 | -5.3 | 75.0 | -16.3 | 65.6 | 10.8 | 60.6 | -15.1 |
| Manitoba | 18.1 | -18.8 | 1.6 | -46.7 | 9.3 | 34.8 | 0.8 | -86.9 | 1.9 | 0.0 | 5.8 | 81.3 | 3.7 | -56.0 |
| Saskatchewan | 19.7 | 16.6 | 1.2 | 0.0 | 8.2 | 43.9 | 2.3 | -23.3 | 3.7 | 825.0 | 2.7 | -30.8 | 3.8 | 153.3 |
| Alberta | 229.8 | -5.5 | 25.2 | -3.4 | 91.6 | 17.0 | 59.6 | -15.5 | 24.6 | 0.0 | 40.8 | -9.1 | 31.7 | -16.4 |
| British Columbia | 293.5 | -11.3 | 27.3 | 13.8 | 111.7 | 7.0 | 124.7 | -27.8 | 90.2 | 29.2 | 141.8 | -1.5 | 104.0 | -5.6 |
| Yukon | 4.8 | 92.0 | 2.8 | 3.7 | 8.5 | -53.8 | 0.6 | -50.0 | N/A | N/A | 3.4 | -10.5 | N/A | N/A |
| Northwest Territories | 1.2 | 140.0 | N/A | N/A | 1.3 | 30.0 | 6.2 | 10.7 | N/A | N/A | 2.1 | N/A | N/A | N/A |

Notes: 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, revised August 27th, 2009

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 2008 Year Review** (pages 4-5) 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. These reports, as well as many consumer and travel trade studies are available on CTC's website www.canada.travel, under the research and statistics section.

Key highlights by market

US Leisure

- US overnight leisure is Canada's strongest market, representing 62.2% of all travellers to Canada in 2008, despite suffering a fourth consecutive year over year decline.
- Of all CTC core markets, in 2008 US leisure travellers experienced the:
 - highest proportion of travellers year round to Canada.
 - highest average party size (2.3), but the second lowest average trip duration (4.3 nights) after the US MC & IT;
 - the lowest average spending per trip (\$474.80).
 - 39.9% of US leisure travellers were 55 years old or over, with the lowest proportion being in the 25 to 34 age group.
- Shopping and sightseeing were the most popular activities despite declines of 9.8% and 9.7% respectively in 2008. Visiting friends or relatives (VFR's), participating in sports and outdoor activities, and visiting historical sites and national parks were also popular activities among US leisure travellers.
- Ontario followed by British Columbia remained the preferred destinations, despite experiencing a year over year decline; however, the Northwest Territories increased its popularity among US leisure travellers by 26.4%.
- The US economy is forecasted to contract in 2009 as it continues to deal with the collapse of the housing market and a global financial crisis. As a result, the CTC forecasts a 3.4% decline in leisure travel and a 4.5% drop in receipts. The US leisure market is only expected to regain its footing by 2010.

¹ Overseas core markets is comprised of all key markets in which the CTC is active in including Mexico, but excluding the United States.

US MC & IT

- In 2008, US MC & IT business travel to Canada dipped 1.0% to 1.9 million visitors.
- Among CTC core markets, US MC & IT travellers in 2008 represented the:
 - 2nd largest market to visit Canada, but the lowest average trip duration (3.3 nights).
 - highest average spending per night (\$254.66), but the second lowest average spend per trip (\$837.85) after US leisure.
 - highest ratio of male (67.8%) to female travellers (32.2%).
- Among US MC & IT travellers, the highest proportion (57.0%) were 45 years of age or older.
- The top activities in 2008 were shopping, going to a bar or night club, and sightseeing. Visiting a historic site or museum and VFR were also popular activities.
- Ontario remained the top destination among MC & IT travellers followed by Quebec and British Columbia. Alberta gained 20.3% in popularity, placing it in 4th place. There were also notable increases in travel to Prince Edward Island, Saskatchewan and Newfoundland.
- In 2009, US MC & IT travel is expected to decrease for a second year, as the US recession forces corporations to reduce travel expenditures. Gross Domestic Product (GDP) is forecasted to contract by 3.0%, and while there may be a mild improvement in the US labour market, unemployment rates will remain high through 2009. The US economy is forecasted to rebound mildly in 2010.

UK

- In 2008, the UK remained the top overseas core market¹ representing 31.9% of travellers to Canada.
- Of all CTC overseas core markets, British travellers:
 - had the highest total spend of \$1.2 billion and tied with Australian travellers for having the largest average party size (1.7).
 - following a 3.1% increase British travellers had the 3rd lowest spend per trip (\$1,414.59) in 2008.
 - represented the highest volume of business travellers to Canada, after experiencing a 22.3% gain.
 - the majority (39.6%) of UK travellers were aged 55 and over; while travellers in the 35 and 44 age group contracted by 15.2% in 2008.
 - had the 3rd highest number of travelers who only stayed with friends or relatives.
- The top activities in 2008 were shopping, sightseeing, and visiting friends and family.
- The most popular destinations for travellers from the UK were Ontario, British Columbia and Alberta.
- In 2009, the UK economy is forecasted to continue to lose steam, contributing to a weakening in consumer and investor spending and a drop in long-haul travel. The CTC forecasts a 8.4% reduction in visitor volume and a 21.7% decline in receipts in 2009, with tourism levels only rebounding in 2011.

France

- In 2008, France registered the largest increase in travel to Canada capturing 15.4% of Canada's overseas core market share.
- Among CTC's overseas core markets, French travellers had the:
 - 2nd largest volume of visitors to Canada, and were the 2nd highest spenders.
 - lowest average spending per trip (\$1,337.34);
 - highest trip duration within CTC's European markets (17.3 nights).
 - highest proportion of summer travellers (up 18.6% over 2007), but the lowest proportion of spring travellers, despite an increase of 16.8% from the previous year.
 - tied with Japan for having the 3rd highest proportion of travellers aged 25 or under following a 12.1% increase over 2007; also the French market represented the 3rd highest proportion of travellers aged 55 and above.
- French travellers represented the 2nd highest proportion of VFR and lowest proportion of pleasure travellers among the European core markets.
- The top activities in 2008 were shopping, sightseeing, and VFR. Interest in visiting a museum or art gallery gained appeal, making it the 4th most popular activity.
- Quebec and Ontario were by far the most popular destinations with BC and Alberta virtually tied in 3rd place. Nova Scotia had a notable 137.2% increase in popularity in 2008.
- Trip volume from France is expected to decline by 5.0% in 2009 and 4.0% in 2010 and begin a gradual recovery in 2011. France's GDP is forecasted to contract by 3.3% in 2009 as it continues to face weakened prospects for industrial production and exports of goods and services. Unemployment rates will most likely increase resulting in subdued consumer spending in 2009.

Germany

- German travellers represented 12.0% of overseas core travellers to Canada and experienced a 5.6% increase in 2008.
- Of all CTC overseas core markets, German travellers had the:
 - 2nd highest proportion of business travellers after China; they also tied with Japan for the 2nd highest proportion of pleasure travellers and had the 3rd lowest proportion of VFR visitors to Canada.
 - 2nd highest proportion of summer travellers, but the lowest proportion of both fall and winter travellers.
 - highest proportion of travellers between the age of 35 to 54, and the 3rd lowest proportion of 34 years old and under travellers.
- The top activities in 2008 were shopping, sightseeing, and visiting a national or state nature park. There was also a

notable increase in the attendance of festivals and fairs (+52.2%).

- Ontario remained the preferred destination followed by British Columbia, Alberta and Quebec; with all four destinations marginally increasing their popularity among German travellers in 2008.
- In 2009, visitor arrivals are forecasted to decline by 8.3% as Germany's economy continues to be affected by the global economic slowdown. It is expected that there will be further downward adjustments to the labour market contributing to a decline in consumer confidence and long-haul travel. The CTC expects travel volumes will only begin to recover in 2011.

Mexico

- Mexico is Canada's fifth largest inbound market and 2nd fastest growing core market, with travel volume increasing by 11.7% in 2008, a new record level.
- Among the CTC's overseas core markets travellers from Mexico had the:
 - highest increase in travel spending (+21.0%), but the 3rd lowest average spending per night (\$71.29).
 - 3rd highest average trip duration (19.9 nights);
 - highest proportion of travellers 24 years and under, following a 27.6% increase in 2008.
- While the top activities in 2008 were shopping and sightseeing, other preferred activities included VFR, visiting historic sites and national or state nature parks.
- Preferred Canadian destinations for Mexican travellers were led by Ontario and Quebec, followed closely by British Columbia.
- In 2009, Mexico is forecasted to experience a significant economic decline mainly as a result of sluggish demand for exports, which is expected to trigger a reduction in long-haul travel. CTC forecasts overall arrivals from Mexico to slow in 2009, but to quickly rebound in 2010 and 2011. Going forward, this assessment on Mexican travel to Canada in 2009 assumes minimal impacts arising from the H1N1 Flu Virus situation.

Japan

- While Japan represents Canada's largest Asia Pacific market, tourism volume fell by 16.6%, along with an 11.5% decline in receipts in 2008.
- Compared to CTC overseas core markets, Japanese visitors had the:
 - 2nd highest average spend per night (\$114.76);
 - 2nd lowest average length of stay (12.0 nights);
 - largest ratio of female to male travellers.
- While a greater proportion of Japanese travellers (28.1%) were in the 55 and above age range, Japanese travellers were also characterised by the 2nd highest proportion of travellers aged 25 to 34 among the CTC overseas core markets.

- The top activities in 2008 were shopping, sightseeing, and visiting national or state nature parks, although all three activities experienced declines in 2008.
- Despite declining volumes, Ontario and British Columbia remained the most popular destination for Japanese travellers. New Brunswick and Prince Edward Island showed significant gains in popularity in 2008.
- For 2009, Japanese travel volume and receipt to Canada are forecasted to decline by 9.0% and 8.4%, respectively. This trend aligns with projections that Japan's GDP will contract by 6.1%, which is expected to lead to a decline in consumer confidence, and an increasingly unfavourable exchange rate. Travel volumes are forecasted to moderately improve in 2010.

China

- China reached a new record high for visitors to Canada in 2008 after growing by 5.3%; this market represents 6.0% of all overseas travellers to Canada.
- Among CTC overseas core markets, Chinese travellers:
 - had the highest average length of stay (28.0 nights) and the highest spend per trip (\$1,656.10), but the lowest average spend per night (\$59.22).
 - 2nd highest increase (18.8%) in travellers visiting during Canada's winter months, despite the majority of Chinese travelers (57%) visiting during the spring and summer.
 - had the highest proportion of VFR and Business travellers; along with the lowest proportion of pleasure travellers.
- The top activities were shopping, sightseeing & VFR with all three categories experiencing increases in 2008. There was also a notable increase in travellers attending festivals and fairs, and in visiting national or state nature parks.
- British Columbia surpassed Ontario as the top destination, followed by Alberta in 3rd place.
- In 2009, China will continue to strengthen as an emerging market with visitor volumes increasing by 5.0%, despite an economic slowdown resulting from poor export market performance. China's GDP growth is forecasted to dip to 6.5% in 2009 before rebounding to 8.5% in 2010.

Australia

- Australia is Canada's 2nd largest Asia Pacific Market, after experiencing a 5.6% increase in traveller volume in 2008.
- Compared to other CTC overseas core markets, Australian travellers had the:
 - largest party size (1.7), but had the 3rd lowest in total tourism volume to Canada.
 - highest average spending per night (\$121.22), as well as the 2nd highest average spending per trip (\$1,622.48).
 - in terms of proportion of travellers visiting Canada, Australian travellers were the highest in spring, the 2nd lowest in summer, but the 3rd highest in fall.

- Top activities in 2008 were sightseeing and shopping, followed by visiting national or state nature parks, and VFR.
- British Columbia continues to be the preferred destination among Australian travellers, receiving more than twice as many travellers than Ontario in second place.
- In 2008, Australia was able to avoid falling into a recession due to cutting interest rates, swift stimulus spending, and strong performance by commodity exports. In 2009, travel volumes are projected to decrease by 3.9% as Australia's economy slows by 0.8% due to a decline in exports, poor housing prices, and the continued effects of the global economic slow down. The market is expected to bounce back in 2011.

South Korea

- In 2008, South Korea experienced a 7.8% decrease in travel volume making it Canada's 2nd weakest market in terms of both total volume and spend.
- Compared to other CTC overseas core markets, in 2008 South Koreans had the:
 - 2nd highest average length of stay (24.2 nights);
 - 3rd highest average spend per trip (\$1,598.01), but the 2nd lowest average spend per night (\$66.17).
 - Smallest average party size (1.3), with the majority of Korean travellers being the youngest international visitors to Canada, with the age group 24 years old or younger increasing the most, whereas the age group 35 and above decreased the most.
 - highest proportion of travellers visiting for other purposes (includes travel by students and personal travel, such as weddings).
- British Columbia was by far the most popular destination, followed by Ontario and Alberta.
- The top activities were shopping, sightseeing & VFR; going to a night club or bar increasing in popularity by 90.8% in 2008.
- International travel from South Korea to Canada is forecasted to decline in 2009 with a strong recovery in 2010 carrying over to 2011. While Korea did not fall into a recession in 2008 and despite a hefty government stimulus package, its economy is forecasted to contract as a result of declining exports in 2009. However, consumer confidence is projected to improve as a result of government spending, low interest rates, and tax cuts.

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