

year-in-review

2007
 facts & figures

tourism highlights

- Tourism spending in Canada totaled \$70.8 billion in 2007, a 6.1% increase compared to 2006.
- Canadian residents accounted for 77.1% or \$54.6 billion, while foreigners spent \$16.2 billion or 22.9%.
- Total tourism Gross Domestic Product (GDP) reached \$28.6 billion in 2007 or 2.0% of Canada's GDP.
- Canada's international travel deficit reached \$10 billion in 2007. The deficit has increased every year since 2002, from a low of \$1.7 billion.
- Employment in Canada's tourism sector reached 653,400 jobs in 2007, for an increase of 2.8% over the previous year.
- Trips taken by overseas residents reached 4.6 million for a gain of 3.4%, offsetting the setback in overnight trips from the U.S., which declined by 3.5% to 13.4 million overnight trips.
- Foreign residents made 17.9 million overnight trips to Canada in 2007, a 1.8% decline over 2006.

Overnight Trips to Canada

	Trips '000	07/06 %	Spending \$ B	07/06 %
Americas				
United States Leisure	11,418	-4.1%	5.5	-4.1%
United States MC & IT	1,953	0.2%	1.6	1.3%
Total United States	13,371	-3.5%	7.1	-2.9%
Mexico	230	13.8%	0.3	7.4%
Total Americas	13,601	-3.2%	7.4	-2.6%
America's* Proportion of all countries %	75.4		56.5	
Overseas				
United Kingdom	892	5.9%	1.2	2.9%
France	358	-0.7%	0.5	-1.3%
Germany	298	0.0%	0.4	-0.5%
Japan	310	-14.7%	0.4	-18.3%
South Korea	188	-0.5%	0.3	2.7%
China	151	8.6%	0.3	1.6%
Australia	208	16.8%	0.3	13.9%
Total Overseas Core Markets	2,404	1.5%	3.3	-0.4%
Overseas Core Markets' Proportion of all countries %	13.3		25.4	
Other Overseas Countries	2,045	20.3%	2.4	12.6%
Other Overseas Countries' proportion of all countries %	11.3		18.2	
Total Countries	18,050	-0.4%	13.0	0.1%

Source: Statistics Canada, International Travel Survey, preliminary estimates

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

Tourism in the Canadian Economy

	\$ billions	07/06 %
Total Demand	70.8	6.1
Domestic	54.6	8.7
International	16.2	-1.7
Tourism GDP	28.6	5.9

Source: Statistics Canada, National Tourism Indicators

Canada's International Travel Account (\$ billions)

	All Countries	U.S.	Overseas
Receipts	16.6	8.3	8.3
Payments	26.7	15.3	11.4
Balance	-10.0	-7.0	-3.1

Source: Statistics Canada, International Travel Account

*Figures may not add up exactly due to rounding



Top Ten Overseas Countries Visited by Canadians

	Trips '000	Nights '000	Spending \$ millions
Mexico	1,017.1	11,081.3	1,076.7
United Kingdom	950.9	11,728.4	1,157.0
France	746.3	9,342.0	976.5
Cuba	723.2	6,117.1	624.9
Dominican Republic	689.6	5,874.9	597.7
Germany	371.4	3,564.6	325.1
Italy	326.6	3,560.9	480.7
Netherlands	258.7	2,103.9	211.5
China	256.6	5,364.5	447.6
Spain	189.0	2,037.6	248.6

Source: Statistics Canada, International Travel Survey, Preliminary Estimates

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.

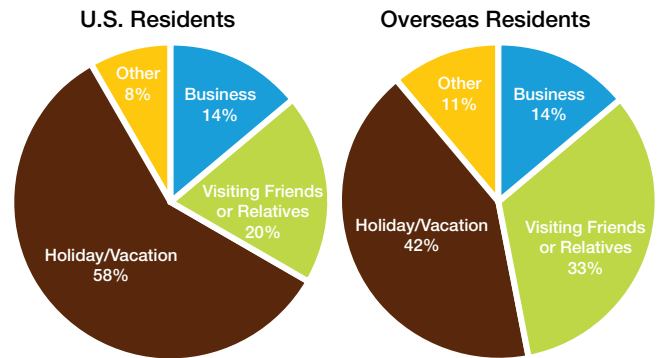
Volume of International Travelers - With the help of Canada Border Services Agency, all ports of entry across Canada participate in collecting monthly census counts of vehicles and passengers entering or re-entering Canada by country of residence and mode.

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.

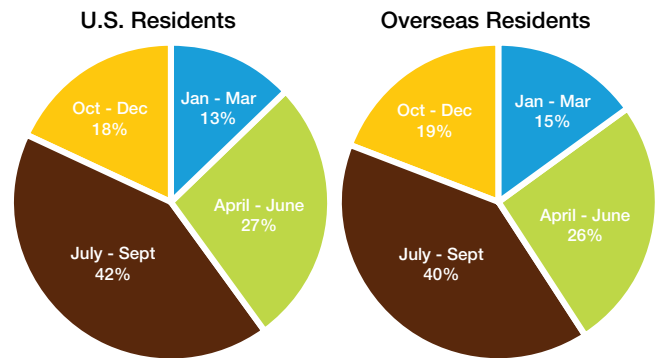
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Distribution of International Tourists to Canada by Purpose



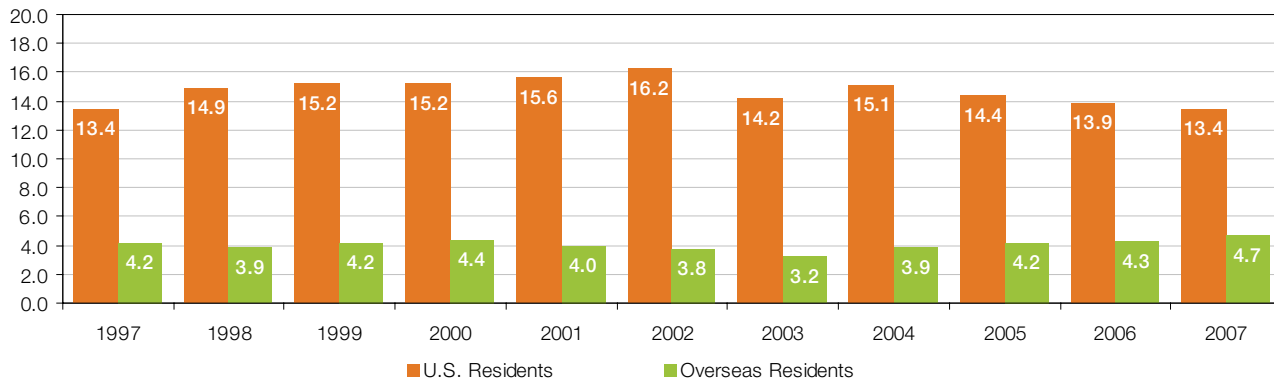
Source: Statistics Canada, International Travel Survey, Preliminary Estimates

Distribution of International Tourists to Canada by Quarter



Source: Statistics Canada, International Travel Survey, Preliminary Estimates

International Tourists to Canada, overnight trips (millions)



Source: Statistics Canada, International Travel Survey

International Travel Competitive Review (000's)

Trips from:	Overnight trips to:							
	Canada		United States		Australia		United Kingdom	
	#	07/06 % Change	#	07/06 % Change	#	07/06 % Change	#	07/06 % Change
Total International	18,050	0	48,359	11	5,644	2	33,745	3
Americas								
United States	13,371	-3	...	...	460	1	3,751	-4
Mexico'	230	14	6,732	15	...	...	61	-31
Overseas Key Markets								
France	358	-1	998	26	...	...	3,399	-8
Germany	298	0	1,524	10	152	2	3,463	2
United Kingdom	892	6	4,498	8	689	-6	...	...
China*	151	9	540	18	357	16	191	35
Japan	310	-15	3,531	-4	573	-12	332	-3
South Korea	188	-1	806	6	253	-3	...	...
Australia	208	17	670	11	...	...	1,007	5
Canada	...	...	17,735	11	115	4	895	3
Total Key Markets	16,006	-3	37,034	10	2,598	-3	13,099	-2

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

Sources: Statistics Canada; 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	07/06 %	Total CTC Core Markets	07/06 %	US	07/06 %	US Leisure	07/06 %	MC&IT	07/06 %	Mexico	07/06 %
Overnight Person-Trips (000's)	18,050.2	-0.4%	16,005.6	-2.6%	13,371.3	-3.5%	11,417.9	-4.1%	1,953.3	0.2%	230.0	13.8%
Overnight Travel Spending (\$M)	13,019.0	0.1%	10,654.0	-1.9%	7,056.5	-2.9%	5,491.4	-4.1%	1,565.1	1.3%	294.1	7.4%
Average Party Size	1.9	5.1%	2.0	28.3%	2.1	-1.4%	2.3	-1.7%	1.4	-2.9%	1.6	-1.3%
Average Trip Duration (Nights)	6.6	-2.7%	5.7	-1.7%	4.0	-0.3%	4.1	0.7%	3.1	-3.8%	17.6	-11.2%
Average Spending per Trip (\$)	721.3	0.6%	665.6	0.8%	527.7	0.6%	481.0	0.0%	801.2	1.1%	1,278.9	-5.6%
Average Spending per Person-Night (\$)	109.1	3.4%	117.5	2.4%	132.6	0.9%	116.4	-0.3%	260.0	5.0%	72.7	6.3%
Seasonality (000's)												
1st. Quarter	2,475.0	-2.1%	2,203.5	-3.9%	1,789.6	-6.3%	1,350.4	-10.1%	439.2	7.5%	36.8	32.9%
2nd. Quarter	4,845.1	-0.2%	4,257.6	-2.9%	3,591.5	-3.1%	3,031.9	-3.8%	559.6	0.7%	59.8	6.0%
3rd. Quarter	7,469.2	-0.4%	6,662.1	-2.3%	5,600.9	-3.1%	5,095.1	-3.1%	505.8	-3.0%	90.1	12.3%
4th. Quarter	3,260.9	0.4%	2,882.4	-1.8%	2,389.2	-2.8%	1,940.5	-2.7%	448.7	-3.2%	43.2	14.0%
Main Trip Purpose (000's)												
Business	2,604.1	-1.8%	2,319.9	-1.1%	1,953.3	0.2%	0.0	0.0%	1,953.3	0.2%	35.1	-5.1%
VFR	4,134.2	0.0%	3,385.5	-2.6%	2,595.1	-5.8%	2,595.1	-5.8%	0.0	0.0%	51.6	23.4%
Pleasure	9,746.6	0.0%	9,027.3	-1.6%	7,795.2	-2.2%	7,795.2	19.0%	0.0	0.0%	110.7	8.4%
Other	1,565.2	-2.2%	1,272.8	-10.8%	1,027.6	-13.1%	1,027.6	-60.5%	0.0	0.0%	32.6	53.1%
Gender												
Male (%)	51.3%	0.7%	51.2%	0.8%	51.2%	0.7%	48.2%	0.3%	68.3%	1.6%	51.8%	-1.7%
Female (%)	48.7%	-0.7%	48.8%	-0.8%	48.8%	-0.7%	51.8%	-0.3%	31.7%	-1.6%	48.1%	1.7%
Age (000's)												
24 & Under	2,440.0	-1.9%	2,142.4	-3.6%	1,695.7	-5.9%	1,637.3	-6.3%	58.3	6.0%	58.5	23.7%
25-34	1,912.1	-0.6%	1,586.0	-3.5%	1,155.6	-4.4%	948.4	-5.4%	207.3	0.6%	37.0	2.2%
35-44	2,733.6	3.8%	2,354.4	0.8%	1,918.7	0.4%	1,489.4	0.3%	429.3	0.6%	49.3	11.8%
45-54	3,295.9	-0.2%	2,913.8	-2.6%	2,468.7	-4.2%	1,866.5	-7.8%	602.3	8.9%	32.7	-7.4%
55+	6,416.6	2.3%	5,851.3	0.7%	5,051.0	0.3%	4,545.7	0.5%	505.3	-1.8%	42.8	23.3%
Accommodation Types (000's Person-Trips)												
Hotel Only	7,022.1	-3.2%	6,586.0	-3.1%	5,571.6	-4.4%	4,010.3	-6.3%	1,561.3	0.6%	110.3	16.0%
Motel Only	1,321.4	1.0%	1,307.8	1.2%	1,276.1	0.4%	1,171.0	0.0%	105.1	5.2%	2.0	233.3%
Home of Friends or Relatives Only	3,371.5	1.2%	2,714.2	-0.7%	2,104.3	-3.2%	2,067.3	-2.6%	37.0	-26.6%	58.6	14.9%
Camping or Trailer Park Only	460.4	-3.2%	446.8	-4.1%	425.0	-5.3%	423.4	-5.0%	1.6	-44.8%	1.3	0.0%
Cottage or Cabin Only	1,018.3	-3.8%	1,008.5	-4.0%	996.3	-3.5%	989.8	-3.4%	6.5	-7.1%	2.1	425.0%
Hotel & Motel	284.0	-9.1%	257.7	-9.0%	220.6	-11.0%	179.0	-14.7%	41.6	-1.4%	1.2	200.0%
Other Combinations of Two or More Types	1,757.9	-32.9%	1,480.3	-31.2%	1,027.0	-28.1%	978.0	-27.5%	49.0	-38.4%	21.4	-38.9%
Activities (000's)												
Visit Friends or Relatives	6,897.0	-1.3%	5,667.5	-2.8%	4,197.5	-5.4%	3,970.7	-5.1%	226.8	-10.1%	108.5	14.5%
Attend a Festival or Fair	1,712.9	9.0%	1,443.9	7.3%	1,086.4	8.5%	1,014.8	9.6%	71.6	-5.3%	44.8	-5.1%
Attend Cultural Events	2,139.3	0.7%	1,875.8	0.3%	1,538.2	2.1%	1,452.9	3.9%	85.3	-21.4%	37.2	1.1%
Visit a Zoo, Aquarium/Botanical Garden	2,635.8	-2.4%	2,165.3	-5.4%	1,497.7	-5.5%	1,426.4	-4.8%	71.3	-18.0%	66.8	-12.7%
Visit a Historic Site	5,785.9	0.6%	4,973.0	-2.1%	3,866.7	-3.1%	3,525.8	-2.9%	340.9	-5.5%	113.4	17.1%
Go Shopping	11,806.8	-1.4%	10,107.2	-3.7%	7,799.2	-5.2%	7,058.8	-4.9%	740.4	-8.0%	206.8	10.2%
Go Sightseeing	10,209.4	-1.3%	8,803.2	-3.7%	6,773.5	-4.7%	6,190.2	-4.2%	583.3	-9.6%	167.2	17.7%
Go to a Bar or Night Club	4,256.4	-2.5%	3,766.3	-3.6%	2,920.8	-3.7%	2,320.7	-5.0%	600.1	1.6%	68.6	1.2%
Visit a Museum or Art Gallery	4,487.9	0.5%	3,850.8	-1.8%	2,866.3	-3.0%	2,658.6	-1.5%	207.7	-18.8%	102.3	37.3%
Visit a National or State Nature Park	5,304.8	3.0%	4,404.1	0.1%	3,063.8	0.1%	2,890.2	0.4%	173.6	-3.8%	107.4	8.0%
Participate in Sports/Outdoor Activities	5,174.1	-2.8%	4,770.3	-3.9%	3,935.8	-5.7%	3,750.0	-5.5%	185.8	-10.3%	61.1	24.9%
Provinces Visited (000's)												
Newfoundland	73.3	1.4%	61.0	5.2%	49.3	0.4%	42.8	13.2%	6.5	-42.0%	0.0	0.0%
Prince Edward Island	166.7	-11.1%	155.0	-14.1%	131.8	-14.5%	129.9	-13.7%	1.9	-45.7%	0.0	0.0%
Nova Scotia	480.7	-6.9%	422.9	-7.2%	332.5	-11.0%	308.9	-11.6%	23.6	-2.5%	1.8	0.0%
New Brunswick	418.1	-1.9%	399.0	-1.0%	357.8	-2.6%	341.0	-3.0%	16.8	7.0%	0.0	-100.0%
Quebec	3,038.3	-5.0%	2,635.3	-5.5%	1,980.8	-6.0%	1,617.7	-6.8%	363.1	-2.2%	82.1	11.4%
Ontario	8,618.8	-3.6%	7,684.2	-4.2%	6,588.2	-4.5%	5,570.0	-5.8%	1,018.2	3.2%	110.7	15.6%
Manitoba	353.3	-2.3%	321.8	-3.3%	264.3	-6.6%	234.6	-4.2%	29.7	-22.3%	5.1	218.8%
Saskatchewan	203.7	-2.9%	185.2	-3.8%	153.3	-3.5%	140.3	2.7%	13.0	-41.7%	1.4	27.3%
Alberta	1,744.7	0.8%	1,460.0	0.0%	931.8	-0.7%	732.1	-0.5%	199.7	-1.1%	15.9	-12.6%
British Columbia	4,908.8	-0.9%	4,405.7	-1.6%	3,394.1	-3.5%	3,062.6	-3.1%	331.5	-7.4%	67.0	8.8%
Yukon	300.9	15.2%	284.4	13.4%	254.4	13.0%	233.3	6.9%	21.1	210.3%	0.3	0.0%
Northwest Territories	31.4	-7.4%	25.5	-22.5%	16.5	-37.3%	12.4	-47.9%	4.1	64.0%	0.2	0.0%

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

	Overseas													
	UK	07/06 %	France	07/06 %	Germany	07/06 %	Japan	07/06 %	China	07/06 %	Australia	07/06 %	S Korea	07/06 %
Overnight Person-trips (000's)	891.5	5.9%	358.4	-0.7%	297.8	0.0%	310.4	-14.7%	151.0	8.6%	207.7	16.8%	187.5	-0.5%
Overnight Travel Spending (\$M)	1,181.6	2.9%	457.9	-1.3%	405.4	-0.5%	403.0	-18.3%	260.7	1.6%	317.0	13.9%	277.9	2.7%
Average Party Size	1.7	2.4%	1.6	4.7%	1.6	32.5%	1.4	2.9%	1.3	1.5%	1.7	4.4%	1.3	-4.3%
Average Trip Duration (Nights)	11.6	-7.8%	14.8	-6.3%	14.8	-3.8%	10.2	-9.3%	23.6	-18.2%	11.5	-8.7%	22.6	1.6%
Average Spending per Trip (\$)	1,325.4	-2.8%	1,277.5	-0.6%	1,361.0	-0.5%	1,298.3	-4.3%	1,726.2	-6.5%	1,526.1	-2.5%	1,481.9	3.3%
Average Spending per Person-Night (\$)	114.1	5.3%	86.3	6.2%	91.9	3.6%	127.8	5.2%	73.3	14.5%	132.6	6.6%	65.7	1.8%
Seasonality (000's)														
1st. Quarter	141.1	11.8%	58.3	6.4%	37.7	7.1%	52.3	-13.0%	22.4	26.6%	30.7	11.6%	34.6	5.5%
2nd. Quarter	229.9	-1.6%	76.6	0.1%	77.7	-1.9%	79.4	-16.6%	37.3	6.3%	60.7	11.6%	44.7	-3.7%
3rd. Quarter	358.1	7.5%	158.0	-3.2%	143.0	2.6%	110.7	-15.6%	57.3	3.2%	72.6	13.8%	71.4	-0.1%
4th. Quarter	162.4	9.0%	65.5	-1.4%	39.5	-10.2%	68.0	-11.9%	34.0	11.1%	43.7	35.7%	36.9	-2.6%
Main Trip Purpose (000's)														
Business	91.2	-7.0%	48.7	1.2%	52.4	-8.1%	44.4	-27.7%	46.1	6.2%	17.1	-16.2%	31.6	-0.3%
VFR	293.0	6.8%	111.9	2.9%	68.6	-8.0%	83.4	19.8%	60.8	36.9%	49.2	14.4%	71.9	6.8%
Pleasure	448.1	4.5%	174.0	0.8%	157.5	7.4%	153.3	-16.7%	25.0	5.5%	128.9	22.8%	34.6	-20.8%
Other	59.2	46.5%	23.7	-25.0%	19.4	-0.5%	29.3	-39.7%	19.1	-30.5%	12.5	30.2%	49.4	7.6%
Gender														
Male (%)	48.1%	1.0%	53.5%	0.5%	58.6%	0.6%	43.5%	3.0%	62.5%	5.5%	46.2%	1.2%	56.6%	1.8%
Female (%)	51.9%	-1.0%	46.5%	-0.5%	41.4%	-0.6%	56.5%	-3.0%	37.6%	-5.3%	53.8%	-1.2%	43.4%	-1.8%
Age (000's)														
24 & Under	114.7	13.8%	71.4	19.8%	47.6	0.8%	50.5	-26.9%	21.3	-9.7%	38.6	58.2%	44.1	-9.6%
25-34	116.9	7.0%	61.6	-4.8%	52.9	-0.2%	75.8	-10.7%	22.1	-19.3%	25.1	10.6%	39.0	9.2%
35-44	145.3	19.4%	45.7	-18.2%	61.5	3.5%	33.0	-28.3%	40.2	30.5%	17.8	-2.7%	42.9	-9.3%
45-54	148.4	9.4%	61.2	-7.1%	53.4	2.9%	49.0	7.9%	32.6	42.4%	35.6	40.2%	32.2	4.5%
55+	348.8	0.9%	108.3	12.1%	75.6	9.6%	86.9	-8.8%	31.0	-2.2%	84.3	9.1%	22.6	13.6%
Accommodation Types (000's Person-Trips)														
Hotel Only	341.2	10.6%	89.2	8.0%	92.6	-4.9%	188.0	-17.3%	55.0	18.3%	96.0	51.7%	42.1	-10.2%
Motel Only	8.7	77.6%	2.8	16.7%	5.1	-27.1%	0.7	40.0%	5.0	284.6%	5.4	157.1%	2.0	0.0%
Home of Friends or Relatives Only	222.8	14.4%	73.5	-14.0%	57.6	3.2%	45.0	5.4%	57.4	36.0%	31.5	-10.8%	63.5	23.8%
Camping or Trailer Park Only	2.4	-31.4%	5.6	86.7%	11.4	17.5%	0.0	0.0%	0.1	0.0%	1.0	-16.7%	0.0	0.0%
Cottage or Cabin Only	3.7	-60.2%	0.8	-46.7%	1.9	-50.0%	0.6	-14.3%	0.5	-28.6%	2.1	31.3%	0.5	0.0%
Hotel & Motel	14.0	0.7%	3.6	-55.6%	6.6	13.8%	2.3	360.0%	0.0	-100.0%	5.0	19.0%	4.4	120.0%
Other Combinations of Two or More Types	138.4	-44.5%	124.1	-11.8%	79.1	-20.8%	27.8	-41.6%	9.8	-71.0%	24.0	-56.3%	28.7	-54.0%
Activities (000's)														
Visit Friends or Relatives	534.7	7.6%	230.3	2.6%	144.3	3.1%	132.3	2.4%	93.4	-3.0%	102.2	3.3%	124.3	7.2%
Attend a Festival or Fair	117.2	12.0%	71.0	15.4%	25.4	-29.4%	31.1	-13.4%	15.3	10.9%	20.2	8.6%	32.5	20.4%
Attend Cultural Events	107.7	-9.6%	73.2	0.5%	33.9	-17.9%	24.4	-8.3%	12.1	1.7%	24.4	-20.5%	24.7	0.8%
Visit a Zoo, Aquarium/Botanical Garden	214.2	-3.3%	122.6	-6.1%	73.1	-5.1%	45.8	-19.4%	28.4	-2.4%	83.8	16.4%	32.9	-15.9%
Visit a Historic Site	375.6	-7.2%	183.0	-3.2%	148.4	4.2%	65.1	-4.4%	57.8	-7.4%	113.7	32.7%	49.3	23.6%
Go Shopping	804.3	4.9%	306.4	-3.9%	239.2	-4.4%	277.3	-10.8%	132.8	5.2%	183.5	15.5%	157.7	3.3%
Go Sightseeing	680.4	0.0%	259.4	2.0%	224.1	-4.1%	261.0	-12.2%	119.6	3.5%	169.6	9.9%	148.4	-5.4%
Go to a Bar or Night Club	367.7	-1.4%	137.3	-3.2%	89.8	-5.6%	44.1	-26.9%	24.7	8.3%	93.8	24.2%	19.5	-46.0%
Visit a Museum or Art Gallery	318.4	-2.2%	175.7	-5.3%	114.0	-6.5%	79.0	-6.4%	35.5	-18.8%	99.9	41.5%	59.7	0.0%
Visit a National or State Nature Park	449.0	0.6%	172.9	-1.5%	170.5	2.8%	147.8	-17.9%	58.6	-9.8%	127.1	20.4%	107.0	3.6%
Participate in Sports/Outdoor Activities	314.1	10.3%	132.5	3.1%	111.0	-6.6%	68.1	21.6%	16.2	-11.5%	84.1	6.5%	47.4	-15.4%
Provinces Visited (000's)														
Newfoundland	3.6	-23.4%	3.8	850.0%	2.2	-4.3%	0.0	-100.0%	0.0	-100.0%	1.8	50.0%	0.3	0.0%
Prince Edward Island	5.1	-63.6%	2.7	575.0%	2.4	-44.2%	7.5	82.9%	1.0	233.3%	3.2	52.4%	1.3	30.0%
Nova Scotia	47.7	16.3%	4.1	-21.2%	22.8	7.0%	3.5	-35.2%	1.7	-15.0%	7.6	55.1%	1.2	50.0%
New Brunswick	20.3	39.0%	6.5	30.0%	8.7	-7.4%	0.2	-90.0%	3.0	130.8%	1.4	-22.2%	1.1	-8.3%
Quebec	123.8	-6.8%	278.3	-5.2%	65.5	-9.7%	32.9	-10.8%	28.5	-10.7%	27.0	42.1%	16.4	-18.4%
Ontario	395.1	-1.6%	108.9	-0.8%	119.7	-1.8%	137.2	-18.7%	93.4	-4.0%	59.4	5.9%	71.6	2.7%
Manitoba	22.5	11.9%	2.8	3.7%	6.8	-17.1%	6.7	-8.2%	1.9	18.8%	3.3	-47.6%	8.4	320.0%
Saskatchewan	16.3	-12.4%	1.1	-52.2%	5.3	10.4%	2.8	154.5%	0.4	-50.0%	3.1	40.9%	1.5	-46.4%
Alberta	234.8	4.5%	25.0	56.3%	74.2	6.3%	71.3	-18.9%	25.0	51.5%	44.0	-5.0%	38.0	-10.4%
British Columbia	324.3	12.2%	23.4	23.2%	100.8	-3.4%	172.2	-5.9%	70.0	7.4%	143.8	20.5%	110.1	-8.2%
Yukon	1.9	-56.8%	1.8	-33.3%	21.0	62.8%	1.2	-60.0%	0.0	0.0%	3.8	40.7%	0.0	0.0%
Northwest Territories	0.5	-44.4%	0.0	0.0%	1.0	-70.6%	5.6	143.5%	1.7	0.0%	0.0	0.0%	0.0	0.0%

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

Analysis of CTC's Core Markets

In an increasingly tourism competitive environment, 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 2007 Year Review (pages 4-5) provides various travel characteristics for the markets that the Canadian Tourism Commission (CTC) is active in. 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

- In 2007, US overnight leisure travel to Canada suffered a third consecutive year over year decline. Despite the slowdown, the US remains Canada's most important market.
- Of all CTC core markets, in 2007 US leisure travellers had the:
 - highest average party size (2.3), but the second lowest average trip duration (4.1 nights);
 - 4th highest average spending per night (\$116);
 - 2nd highest proportion of summer travellers, although spring is also a popular season;
 - highest proportion of pleasure travellers; and
 - highest proportion of travellers aged over 55, but lowest proportion of those in the 25 to 34 age group.
- The top activities in 2007 were shopping, sightseeing, and visiting friends or relatives. Participating in sports and outdoor activities, and visiting historical sites and cultural events were also popular.
- Despite declines, Ontario followed by British Columbia remained the US leisure travellers' preferred destinations; Newfoundland, Yukon and Saskatchewan gained in popularity.
- For 2008, the economic slowdown led by the housing crisis, higher fuel prices, and weakening \$US is expected to propulse further reductions in overnight US leisure travel volume and receipts. This trend is expected to level off in 2009.

US MC & IT

- In 2007, US MC & IT business travel to Canada registered a marginal increase.
- Of all CTC core markets, in 2007 US MC & IT travellers had the:
 - lowest average trip duration (3.1 nights);
 - highest average spending per night (\$260), but the second lowest average spend per trip (\$801) after US Leisure;
 - largest ratio of male to female travellers; and
 - lowest proportion of travellers 24 year old and under; and the highest proportion of 45-54 year old travellers.
- The top activities in 2007 were shopping, going to a bar or night club, and sightseeing. Visiting a historic site, or museum and visiting friends or relatives were also at the top of the list for this business group.
- Ontario remained the preferred destinations followed by Quebec and British Columbia for the US MC & IT travellers. The Yukon and Northwest Territories became more popular in 2007; as well, there were increased visits to New Brunswick.
- For 2008, given the economic slowdown in the US, corporate profits taking a hit, the weakening of the \$US and its potential to reduce perceived value and competitive pricing, overnight US MC & IT travel volume are expected to decrease. A moderate surge could occur in 2009 due to increased exports and U.S. federal programs implemented earlier in the year, and trend up in 2009 and 2010.

UK

- In 2007, the UK remains the top overseas market in terms of inbound travel volume and spending to Canada.
- Of all CTC overseas markets (excludes the US), British travellers had the:
 - highest average party size (1.7);
 - 3rd highest proportion of summer travellers, and 2nd lowest proportion of fall travellers;
 - 3rd greatest share of VFR travel, even though pleasure travel was their main purpose for travel; and
 - 2nd highest proportion of travellers aged 55 and over, and lowest proportion of travellers aged 24 & under.
- The top activities in 2007 were shopping, sightseeing, and visiting friends or relatives. British travellers also participate in a blend of culture, soft adventure and activities such as golf, aboriginal tourism and spas.
- Ontario, followed by British Columbia, was the most popular destinations for travellers from the UK; Alberta was their next preferred destination.
- In 2008, the UK economy is expected to maintain a positive, but slower momentum; and the CTC is forecasting a modest increase in UK travellers to Canada. The UK economic growth rate is expected to further expand in 2009 and 2010.

France

- In 2007, France registered a marginal decline in travel to Canada.
- Of all CTC core markets, French travellers had the:
 - 3rd lowest average spending per trip (\$1,278);
 - 3rd highest proportion of summer travellers and lowest proportion of spring travellers; and
 - 3rd highest proportion of travellers aged 24 and under, and the third lowest proportion 35 to 44 age group.
- French travel to Canada was primarily for pleasure with their largest increase in travel for attending a festival or fair, participating in sports and outdoor activities and visiting friends and relatives.
- The top activities in 2007 were shopping, sightseeing, and visiting friends or relatives as travellers from France were looking for a combination of nature and activities with a focus on well-being.
- Quebec and Ontario remained the most popular destinations as French travellers continued to make a French language and cultural connection with Canada.
- The CTC forecast for overall arrivals from France is for modest growth in 2008 and 2009. France's economy is expected to expand in 2008, and decelerate somewhat in 2009 and 2010 as weakening economic conditions, inflationary pressures and general uncertainties impact long-haul travel.

Germany

- In 2007, German travel to Canada remained unchanged.
- Of all CTC overseas markets (excludes the US), German travellers had the:
 - 3rd highest average party size (1.6);
 - 2nd highest proportion of business travel;
 - highest proportion of summer travellers, and lowest proportion of fall travellers; and
 - 2nd highest proportion of travellers in the 45 to 54, and third highest proportion in the 25 to 34 age groups.
- The top activities in 2007 were shopping, sightseeing, and visiting a national or state nature park; German travellers are becoming more interested in experiencing Canadian food, culture, landscapes and customs.
- Ontario, followed by British Columbia remained German travellers' preferred destinations; the Yukon gained the most popularity in 2007.
- For 2008, Germany's international overnight travel volume is expected to increase moderately, with higher increases in 2009, while overnight receipts are projected to increase steadily 2008-2010. Germany economic growth is expected to have a limited setback in 2008 and 2009 due to the deteriorating global environment.

Mexico

- Mexico registered a strong increase in travel to Canada in 2007, reaching a record level.
- Of all CTC core markets, travellers from Mexico had the:
 - 3rd highest average trip duration (17.6 nights);
 - 2nd lowest average spending per night (\$72.7);
 - 2nd highest proportion of travel for other purposes (includes travel by students and personal travel, such as weddings), and 2nd lowest proportion of travellers visiting friends or relatives; and
 - highest proportion of travellers 24 years and under; lowest proportion in the 45-54 age group, and second lowest proportion in the 55 plus group.
- While the top activities in 2007 were shopping and sightseeing, Mexican travellers also prefer visiting cosmopolitan centers that offer cultural and historical activities, as well as visiting friends or relatives;
- Preferred Canadian destinations for Mexican travellers were Ontario and Quebec followed by British Columbia.
- For 2008, Mexico's international overnight travel volume and receipts are expected to continue expanding. However, due to its close ties to the economic cycle of the US, Mexico's economy may experience a slowdown in coming years. Current investments in public-private infrastructure developments, tourism programs and diversification of its export markets could however help offset the slowdown.

Japan

- In 2007, Japanese visits and receipts continued to decline.
- Of all CTC core markets, Japanese visitors had the:
 - 3rd highest average spend per night (\$128);
 - 3rd lowest average length of stay (10.2 nights); and
 - 3rd lowest proportion of summer travellers;
 - highest proportion of travellers in the 25-34 age group; and
 - largest ratio of female to male travellers.
- The top activities in 2007 were shopping, sightseeing, and visiting national or state nature parks. As Japanese travellers shift towards customized products that offer "original and simple" personal experiences, heritage and cultural experiences are also becoming more popular.
- British Columbia remained the most popular destination for Japanese, followed by Ontario. Saskatchewan and the Northwest Territories gained in popularity in 2007.
- For 2008, the forecasts for Japanese international travel demand are for a continued decline, stabilizing in 2009 and returning to moderate growth in 2010-2012. Japan will require continued economic growth in order to sustain improvement in overall consumer confidence - air capacity, pricing, exchange rates and revitalizing Canada's image are factors that need to be addressed in order to improve Japanese travel to Canada.

China

- Stimulated by the world's fastest growing economy, travel to Canada from China reached another record high in 2007.
- Of all CTC core markets, Chinese travellers had the:
 - highest average length of stay (23.6 nights), but the third lowest average spend per night (\$73);
 - 2nd highest proportion of fall travellers after U.S. MC & IT as Chinese travellers preferred to travel to Canada mainly during summer; and
 - highest proportion travellers visiting friends or relatives, and 2nd highest proportion travelling on business.
- While the top activities in 2007 were shopping, sightseeing & visiting friends or relatives, the greatest increase in activities for Chinese travellers was to attend a festival or fair and go to a bar or night club.
- Ontario was by far China's preferred destination, while British Columbia was second.
- Chinese travel is forecasted to continue its expansion in 2008 and 2009 setting new records for travel to Canada. China's strengthening currency and continued buoyant economy are expected to further stimulate gains in private consumption.

Australia

- Of all CTC core markets, Australia registered the highest increase in travel volume to Canada in 2007.
- Compared to other CTC core markets, Australian travellers had the:
 - 2nd highest average spending per trip (\$1,526), as well as 2nd highest average spending per night (\$133);
 - highest proportion of spring travellers, even though summer was their peak season;
 - 2nd highest proportion of pleasure travellers, and 2nd lowest proportion of travellers on business and visiting Canada for other purposes; and
 - 2nd largest proportion of those aged 55 and over, and lowest proportion of travellers in the 35-44 age group.
- Top activities in 2007 were shopping and sightseeing, closely followed by visiting national or state nature parks, and visiting historic sites as Australians' interest in lifestyle, experiential and culture travel continued to grow.
- British Columbia was the most popular destination; Ontario was the second most popular, followed by Alberta.
- Australian international travel demand is expected to increase in 2008 and 2009. The increases in non-stop flights, Australians stronger propensity to travel outbound and the upcoming 2010 Olympics should help to facilitate the growth of visitors from Australia to Canada.

South Korea

- In 2007, South Korea registered a moderate decline in travel volume, but remained Canada's 2nd largest Asian inbound market.
- Compared to other CTC core markets, in 2007 South Koreans had the:
 - 2nd highest average length of stay (22.6 nights);
 - 3rd highest average spend per trip (\$1,482), but the lowest average spend per night (\$66);
 - 2nd highest proportion of travellers in the winter, even though summer was the peak season;
 - highest proportion of travellers visiting for other purposes (includes travel by students and personal travel, such as weddings); and
 - 2nd largest proportion of 24 and under, and 25-34 age groups, however, the lowest proportion of those aged 55 and over.
- British Columbia was the most popular destination by far; Ontario was the second most popular.
- In 2008, the forecast for South Korean international travel to Canada is for a moderate gain, with continued increases in 2009 and 2010. The South Korean economy is expected to maintain its growth in 2008 and 2009 as its main growth drivers are capital investment and exports.

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