

Tourism in Canada experienced declines in 2009 both in the number of visitors to Canada and in dollars spent on tourism. The World Tourism Organization reported that international tourist arrivals declined worldwide by 4% in 2009, the first such decline since 2003. Three issues are thought to be responsible for the downturn: the 2008–2009 recession, the 2009 H1N1 influenza pandemic and the new Western Hemisphere Travel Initiative rules that came into effect June 1, 2009.

Government revenues from tourism activities in Canada declined 3.7% to \$19.2 billion in 2009, decreasing for the first time since 2003. Of this total, \$8.8 billion in revenues went to the federal government, down 5.0% from the previous year. Most of the decline in government tourism revenue stemmed from a drop in revenue directly related to tourism exports, which fell 9.6% to \$4.3 billion.

Tourism spending by international visitors fell 12.8% in 2009, as travel from both the United States and overseas countries declined. Revenues from domestic tourism spending declined 1.8% to \$14.9 billion, the first such decline since 2000.

Spending recovers in 2010

Tourism spending in Canada increased 4.2% in real terms in 2010, following a 2.2% decline in 2009. Spending by international visitors in Canada was up 1.9%, boosted by a strong first-quarter performance related to the 2010 Winter Olympics and Paralympics held in Vancouver. This was the first annual increase in tourism exports in six years.

Overnight travel from the United States and overseas countries increased 0.7% and 6.8%, respectively. Same-day travel from the United States continued its downward trend, dropping 4.4% from 2009. A more expensive Canadian dollar

and higher gas prices contributed to the decline in same-day travel.

International visitors' spending on several commodities increased in 2010, including passenger air transport (7.1%), accommodation (3.0%) and food and beverage services (2.2%). Outlays on vehicle fuel, recreation and entertainment and non-tourism commodities all declined.

Tourism GDP advanced 4.4%, with gains posted in all quarters in 2010. Most industries expanded, led by a 6.4% rise in tourism GDP for the transportation industry. In comparison, the GDP for Canada rose 3.3% in 2010.

Winter Olympics bring in the crowds

The 21st Winter Olympics were hosted by Vancouver in February and March 2010. Travel from the United States and overseas countries to Canada increased 5.2% from January to February. British Columbia alone experienced a 24.0% increase in non-resident entry during the month of February. In that month, 10.9% more overseas residents and 29.1% more American residents entered British Columbia for overnight trips compared with January. The largest increase (61.8%) was in the number of trips by residents of the Netherlands.

Tourism spending by non-Canadians reached a high of \$3.6 billion in the first

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quarter of 2010, a 6.4% jump from the previous quarter but still down 3.2% from the first quarter of 2009. International visitors spent \$2.4 billion in Canada in the first quarter, up 0.4% from one year earlier, ending a string of year-over-year declines that started in the first quarter of 2008.

Money spent by international visitors on passenger air transport was up 10.0% in the first quarter of 2010 and spending on vehicle fuel was 4.2% higher compared with the fourth quarter of 2009.

Domestic spending on the increase

Spending on tourism in Canada by Canadians increased 4.8% in 2010, with most of the gain in the second and third quarters. Passenger air transportation with Canadian carriers increased 7.9%. Higher spending was registered on vehicle fuel (4.2%), accommodation services (5.2%), other tourism commodities (2.2%) and non-tourism commodities (7.2%).

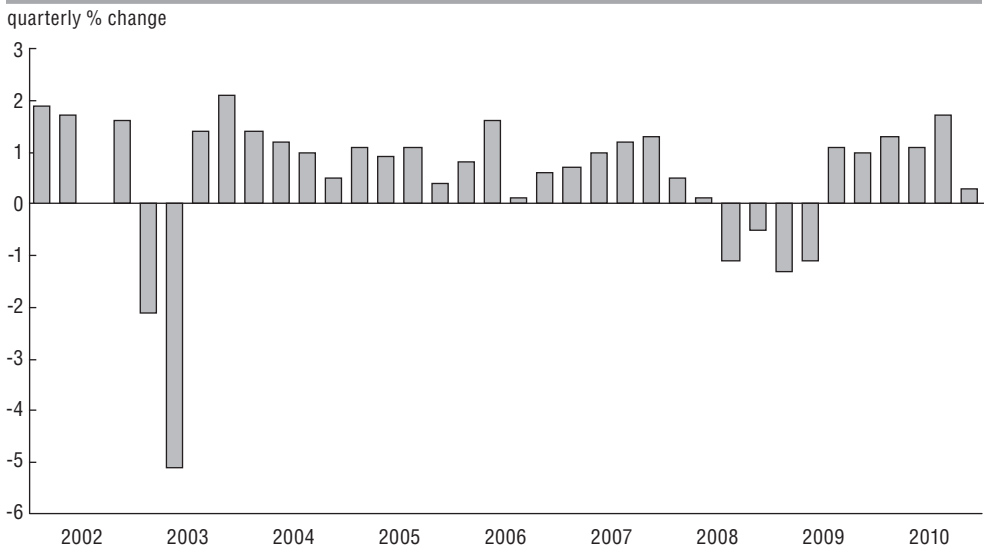
Table 31.a
Vehicles travelling between Canada and the United States

	2000	2010
	number	
Total vehicles entering		
Canada	43,127,250	30,941,292
U.S. vehicles entering	20,110,235	9,244,018
Canadian vehicles returning	23,017,015	21,697,274

Source: Statistics Canada, CANSIM table 427-0002.

Tourism employment edged up 0.1% for the year, reaching 617,200, as gains were recorded in each quarter except the second. Employment increased in the accommodation, food and beverage services, recreation and entertainment, and non-tourism industries, whereas transportation and travel services industries posted declines. The increase in tourism employment contrasts with 2009, when tourism employment fell 0.5%. The accommodation industry and the recreation and entertainment industry were the only two industries to report employment increases in 2009.

Chart 31.1
Tourism demand



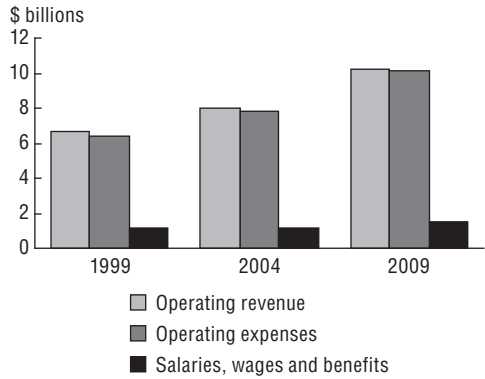
Note: Adjusted for seasonal variation and price change.
Source: Statistics Canada, CANSIM table 387-0001.

Travel arrangement and reservation service sector is growing

When Canadian tourism spending by international visitors fell in 2009 to its lowest level in 15 years, the effects were felt by the travel arrangement services industry group. The industry experienced a decline of 1.7% in operating revenue in 2009, losing the momentum gained in 2008 that saw revenue rise by 1.8%. The industry's profit margin dropped from 1.6% in 2008 to 0.8% in 2009.

Tour operators continued to dominate this industry group, accounting for more than three-quarters of total operating revenue. Despite operating revenue increasing 0.6% to \$7.7 billion, tour operators recorded a loss of 0.5%. Travel agencies recorded total operating revenue of \$1.5 billion in 2009, down 6.5% from 2008. Operating expenses for travel agencies also declined to \$1.4 billion,

Chart 31.2
Travel arrangement services, operating statistics



Source: Statistics Canada, CANSIM table 351-0003.

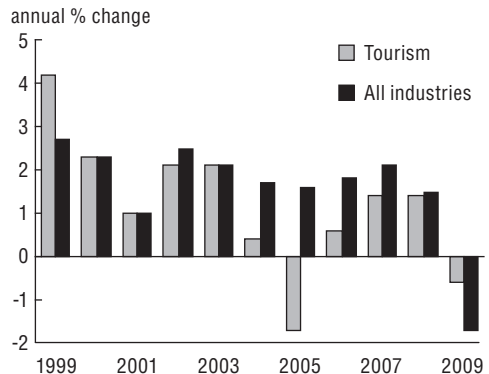
down 5.7%. In 2009, the top 20 travel arrangement firms accounted for 36% of the industry's total revenue. By contrast, the top 20 tour operating companies accounted for 81% of the industry's total revenue in 2009.

Employment in Canadian tourism

In 2009, the Canadian tourism sector accounted for 1.6 million jobs, or 9.4% of all jobs in Canada, down slightly from 10.0% in 1999. Jobs include both full-time and part-time jobs, as well as employee jobs and jobs from self-employment. Five occupational groups dominated the tourism sector, accounting for 48.2% of all jobs: food-counter attendants, kitchen helpers and related occupations (245,000 jobs); food and beverage servers (191,000 jobs); cooks (145,000 jobs); restaurant and food service managers (82,000 jobs); and cashiers (59,000 jobs).

By the fourth quarter of 2010, employment across all tourism sectors was 0.8% higher than at the same point in 2009. In 2009, however, jobs in tourism industries declined 0.6% from 2008, a smaller decline than for all industries in Canada (1.7%).

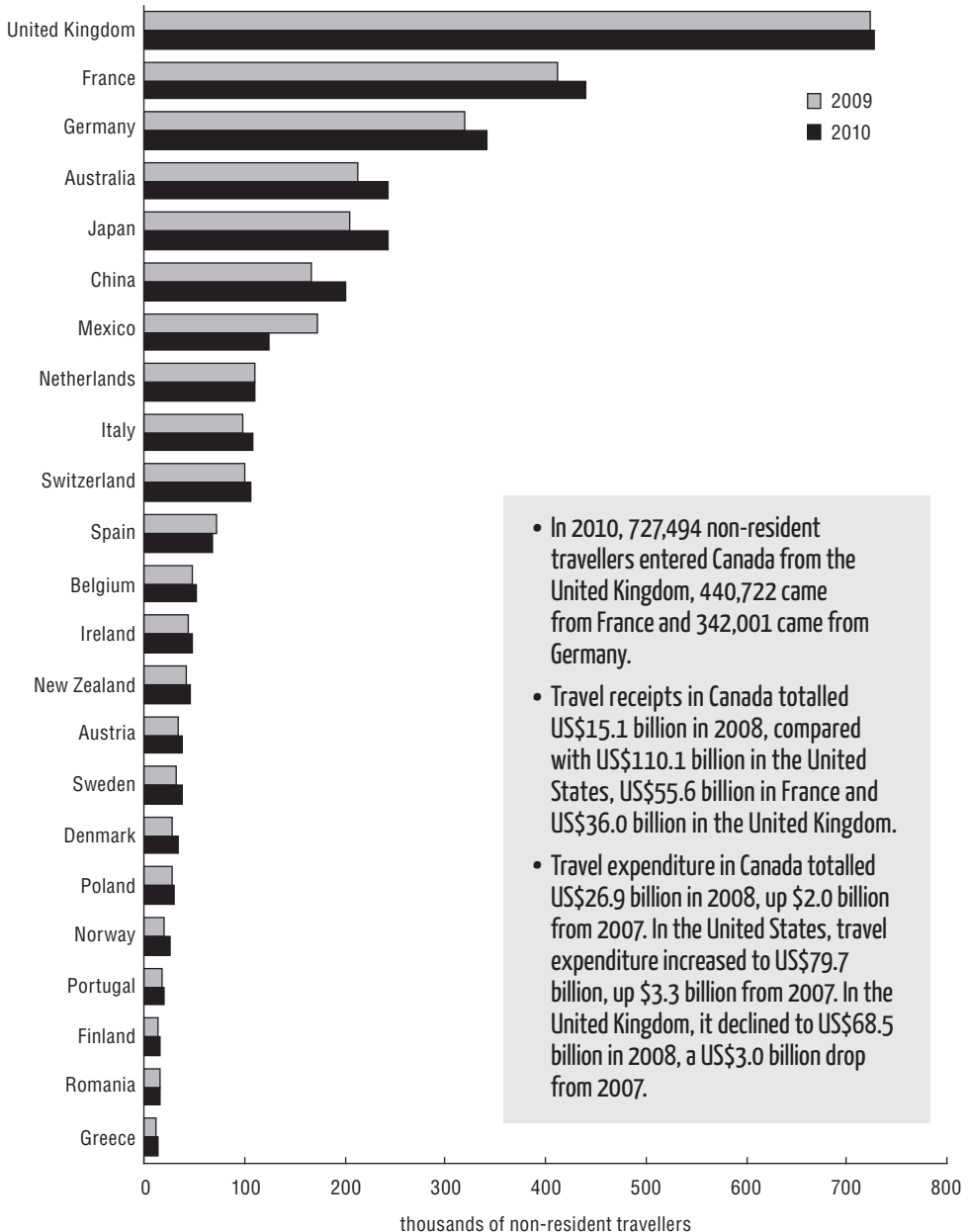
Chart 31.3
Job growth in tourism industries



Source: Statistics Canada, Catalogue no. 13-604-M.

In 2009, the workweek in tourism was 29.0 hours per week, compared with 32.7 hours in the total economy. This reflects the higher proportion of part-time jobs and the lower proportion of self-employment.

INTERNATIONAL perspective

Chart 31.4
Non-resident travellers entering Canada, by selected country of residence


- In 2010, 727,494 non-resident travellers entered Canada from the United Kingdom, 440,722 came from France and 342,001 came from Germany.
- Travel receipts in Canada totalled US\$15.1 billion in 2008, compared with US\$110.1 billion in the United States, US\$55.6 billion in France and US\$36.0 billion in the United Kingdom.
- Travel expenditure in Canada totalled US\$26.9 billion in 2008, up \$2.0 billion from 2007. In the United States, travel expenditure increased to US\$79.7 billion, up \$3.3 billion from 2007. In the United Kingdom, it declined to US\$68.5 billion in 2008, a US\$3.0 billion drop from 2007.

Note: Excludes the United States.

Source: Statistics Canada, CANSIM table 427-0006.

Table 31.1 Tourism gross domestic product, 1995 to 2010

	1995	1996	1997	1998	1999	2000	2001
	\$ millions constant 2002						
Tourism gross domestic product	18,034	18,426	20,014	21,164	22,410	23,266	23,222
Total tourism industries	14,278	14,556	15,782	16,475	17,517	18,196	18,002
Transportation	4,194	4,430	5,163	5,390	5,982	6,272	5,905
Accommodation	4,935	4,951	5,114	5,285	5,320	5,404	5,461
Food and beverage services	2,388	2,322	2,478	2,587	2,767	2,864	2,857
Other tourism industries	2,760	2,853	3,027	3,212	3,450	3,656	3,778
Other industries	3,754	3,870	4,233	4,688	4,893	5,071	5,219

Source: Statistics Canada, CANSIM table 387-0010.

Table 31.2 Receipts and payments on international travel account, 1995 to 2010

	1995	1996	1997	1998	1999	2000	2001
	\$ millions						
Spending in Canada by foreign residents (receipts)	10,818	11,748	12,221	14,019	15,142	15,997	16,436
Spending in foreign countries by Canadians (payments)	14,093	15,353	15,873	16,029	17,092	18,444	18,487
Receipts minus payments, international travel account	-3,273	-3,604	-3,651	-2,009	-1,952	-2,448	-2,050

Source: Statistics Canada, CANSIM table 387-0005.

Table 31.3 Employment generated by tourism, 1996 to 2010

	1996	1997	1998	1999	2000	2001
	thousands					
Tourism activities	534.6	548.9	565.9	588.4	610.0	608.4
Total tourism industries	431.2	442.5	456.8	474.7	490.8	488.4
Transportation	76.3	78.4	80.8	83.5	85.5	82.6
Air transportation	51.4	53.1	55.0	56.7	58.2	55.5
Railway transportation	2.4	2.4	2.6	2.8	2.9	2.8
Water transportation	1.4	1.6	1.7	1.8	1.9	1.9
Bus transportation	9.0	9.2	9.4	9.6	9.8	9.9
Other transportation industries	12.1	12.1	12.1	12.6	12.7	12.5
Accommodation	150.0	151.1	154.5	157.0	159.2	158.4
Food and beverage services	115.8	121.9	126.5	135.4	143.2	143.8
Other tourism activities	89.1	91.1	95.0	98.9	102.9	103.6
Recreation and entertainment	51.7	53.6	57.1	59.0	61.1	61.9
Travel agencies	37.4	37.5	37.9	39.9	41.8	41.7
Other industries	103.4	106.5	109.1	113.7	119.1	120.0

Source: Statistics Canada, CANSIM table 387-0003.

2002	2003	2004	2005	2006	2007	2008	2009	2010
\$ millions constant 2002								
23,320	22,350	23,331	23,980	24,663	25,338	25,667	25,008	26,119
17,921	17,031	17,791	18,280	18,724	19,201	19,439	18,812	19,678
5,526	5,080	5,393	5,752	6,001	6,232	6,487	6,210	6,609
5,708	5,476	5,767	5,827	5,967	6,133	6,097	5,910	6,212
2,898	2,792	2,886	2,931	2,987	3,036	3,111	3,034	3,100
3,789	3,683	3,745	3,770	3,769	3,800	3,744	3,658	3,757
5,399	5,319	5,540	5,700	5,939	6,137	6,228	6,196	6,441

2002	2003	2004	2005	2006	2007	2008	2009	2010
\$ millions								
16,741	14,776	16,979	16,674	16,457	16,578	16,544	15,520	16,263
18,400	18,728	20,237	21,866	23,316	26,511	28,629	27,692	30,382
-1,660	-3,951	-3,257	-5,192	-6,859	-9,933	-12,085	-12,172	-14,119

2002	2003	2004	2005	2006	2007	2008	2009	2010
thousands								
611.0	602.2	610.6	607.1	608.1	613.6	619.9	616.8	617.2
490.4	482.8	490.0	485.6	487.8	492.4	499.0	497.5	496.8
77.8	75.7	73.2	66.6	68.8	71.7	73.4	72.3	71.2
50.6	48.8	46.8	39.6	40.7	42.6	43.5	42.8	42.4
2.9	2.7	2.7	2.8	3.0	3.2	3.2	3.1	3.0
1.9	1.7	1.8	1.7	1.8	1.9	1.9	1.8	1.8
9.8	9.8	9.6	9.4	9.9	10.4	10.8	10.7	10.6
12.7	12.7	12.3	13.0	13.4	13.6	13.9	13.9	13.4
160.5	155.4	161.6	163.2	160.8	161.8	160.6	162.4	164.3
144.7	144.8	145.3	145.4	147.5	147.2	151.0	149.7	149.8
107.3	107.0	110.0	110.5	110.7	111.7	114.0	113.1	111.4
65.5	66.0	68.2	68.1	68.7	69.3	70.0	70.7	72.0
41.8	40.9	41.8	42.4	42.0	42.4	44.0	42.4	39.5
120.7	119.4	120.5	121.5	120.3	121.2	120.9	119.3	120.5

Table 31.4 Travel arrangement and reservation services, operating statistics, 2005 to 2009

	2005	2006	2007	2008	2009 ^p
	\$ millions				
Travel agencies					
Operating revenue	1,592.3	1,668.7	1,659.2	1,623.5	1,517.9
Operating expenses	1,509.0	1,551.0	1,555.4	1,516.7	1,430.7
	%				
Operating profit margin	5.2	7.1	6.3	6.6	5.7
	\$ millions				
Tour operators					
Operating revenue	6,971.7	7,217.0	7,515.8	7,655.4	7,701.2
Operating expenses	6,894.2	7,118.1	7,444.7	7,636.0	7,739.5
	%				
Operating profit margin	1.1	1.4	0.9	0.3	-0.5
	\$ millions				
Other travel arrangement and reservation services¹					
Operating revenue	264.7	279.0	1,006.3	1,084.1	968.9
Operating expenses	243.8	257.1	988.6	1,043.3	937.2
	%				
Operating profit margin	7.9	7.8	1.8	3.8	3.3

Notes: North American Industry Classification System (NAICS), 2007.

Operating revenue excludes investment income, capital gains, extraordinary gains and other non-recurring items.
Operating expenses exclude write-offs, capital losses, extraordinary losses, interest on borrowing and other non-recurring items.

Operating profit margin is derived as follows: operating revenue minus operating expenses, expressed as a percentage of operating revenue.

1. Starting with 2007, data cannot be compared with those for previous years.

Source: Statistics Canada, CANSIM table 351-0003.

Table 31.5 Accommodation services, operating statistics, 2005 to 2009

	2005	2006	2007	2008	2009
	\$ millions				
Operating revenue	14,193.0	14,809.1	15,770.5	16,163.8	15,088.2
Operating expenses	12,009.2	12,608.9	13,910.0	14,313.3	13,837.5
Salaries, wages and benefits	4,473.5	4,669.3	4,760.2	4,888.9	4,680.6
	%				
Operating profit margin	15.4	14.9	11.8	11.4	8.3

Notes: North American Industry Classification System (NAICS), 2007.

Operating revenue excludes investment income, capital gains, extraordinary gains and other non-recurring items.
Operating expenses exclude write-offs, capital losses, extraordinary losses, interest on borrowing and other non-recurring items.

Salaries, wages and benefits include vacation pay and commissions for all employees for whom a T4 slip was completed and the employer portion of employee benefits for items such as Canada/Québec Pension Plan or Employment Insurance premiums.

Operating profit margin is derived as follows: operating revenue minus operating expenses, expressed as a percentage of operating revenue.

Source: Statistics Canada, CANSIM table 351-0002.

Table 31.6 Canadians travelling in Canada, by province and territory of destination, 2004 to 2009

	2004	2005	2006	2007	2008	2009
	thousands					
Canada	185,134	203,976	207,470	214,559	214,498	227,121
Newfoundland and Labrador	3,583	3,251	3,068	2,939	3,006	3,256
Prince Edward Island	1,048	1,092	1,018	1,057	1,082	1,196
Nova Scotia	5,985	7,265	7,318	7,087	7,131	7,604
New Brunswick	4,379	5,293	5,254	5,349	4,937	5,358
Quebec	44,674	51,611	57,278	57,240	58,410	62,736
Ontario	77,236	82,700	83,036	86,903	84,995	88,412
Manitoba	7,151	6,983	7,275	7,294	7,109	7,935
Saskatchewan	7,797	7,814	7,874	8,164	8,028	8,464
Alberta	13,125	18,727	17,364	20,052	20,601	20,398
British Columbia	20,112	18,931	17,908	18,418	19,126	21,619
Yukon, Northwest Territories and Nunavut	..	..	77	56 ^E	75 ^E	144 ^E

Note: All trips with a destination in Canada.

Source: Statistics Canada, Canadian Travel Survey – Travel Survey of Residents of Canada Bridging Project.

Table 31.7 Expenditures by Canadians on trips in Canada, by province and territory of destination, 2004 to 2009

	2004	2005	2006	2007	2008	2009
	\$ thousands					
Canada	26,299,571	29,349,441	30,370,293	31,512,813	33,206,189	32,372,549
Newfoundland and Labrador	580,359	556,702	578,466	613,323	668,216	585,577
Prince Edward Island	149,013	184,515	256,255	210,645	206,252	227,494
Nova Scotia	780,325	996,174	1,072,260	984,719	1,047,375	1,153,584
New Brunswick	703,055	747,261	767,427	732,070	754,669	714,847
Quebec	5,531,487	6,348,527	6,802,911	7,002,866	7,196,804	7,310,818
Ontario	9,237,284	10,285,870	10,637,175	11,006,038	11,450,412	10,860,767
Manitoba	827,254	833,557	902,279	987,116	966,435	1,041,958
Saskatchewan	1,149,117	1,184,540	1,140,990	1,168,570	1,245,043	1,260,292
Alberta	2,876,157	3,621,678	3,664,737	4,107,182	4,198,567	3,936,861
British Columbia	4,403,611	4,370,479	4,483,499	4,642,885	5,365,741	5,220,576
Yukon, Northwest Territories and Nunavut	..	..	64,294 ^E	57,397 ^E	106,674 ^E	59,774 ^E

Note: Excludes spending done in Canada for foreign travel or spending for interprovincial trips, spending done in the province of origin of the trip when there is no overnight visit reported in that same province and both the point of origin and portion of airfare allocated to the province of origin of the trip.

Source: Statistics Canada, Canadian Travel Survey – Travel Survey of Residents of Canada Bridging Project.

Table 31.8 International travellers entering or returning to Canada, 2006 to 2010

	2006	2007	2008	2009	2010
	thousands				
Total international travellers	89,120.8	89,103.1	87,146.0	79,132.1	85,679.7
Total non-resident travellers	33,390.2	30,373.5	27,370.1	24,695.7	24,669.1
U.S. residents entering Canada	28,872.7	25,694.6	22,605.6	20,525.6	20,213.5
Residents of countries other than United States entering Canada	4,517.5	4,678.9	4,764.5	4,170.1	4,455.6
Total Canadian residents	46,912.3	50,044.6	51,737.3	47,484.1	53,619.6
Canadian residents returning from the United States	40,173.4	42,640.7	43,613.2	39,254.1	44,902.7
Canadian residents returning from countries other than the United States	6,738.9	7,403.8	8,124.0	8,229.9	8,716.9
Total other travellers	8,818.2	8,685.1	8,038.7	6,952.3	7,391.0
Immigrants and former residents	287.1	268.2	263.4	243.7	242.7
Non-resident crews	3,080.7	3,143.2	2,989.3	2,631.4	2,798.8
Canadian crews	5,450.4	5,273.7	4,786.0	4,077.2	4,349.4

Source: Statistics Canada, CANSIM table 427-0001.

Table 31.9 Non-resident travellers entering Canada, by country of residence, 2005 to 2010

	2005	2006	2007	2008	2009	2010
	thousands					
Total non-resident travellers, countries other than the United States	4,505.1	4,517.5	4,678.9	4,764.5	4,170.1	4,455.6
Europe	2,372.9	2,334.7	2,430.3	2,492.1	2,252.3	2,365.5
Africa	71.9	83.2	86.7	91.4	86.8	93.8
Asia	1,321.3	1,327.6	1,307.8	1,265.3	1,082.8	1,230.2
North America, Central America and the Caribbean	354.7	381.4	425.2	450.9	340.6	298.1
South America	131.2	141.8	152.7	163.5	147.9	173.1
Oceania and other Ocean Islands	253.0	248.8	276.3	301.2	259.8	294.9

Source: Statistics Canada, CANSIM table 427-0003.

Table 31.10 Travel by Canadians to foreign countries, top 15 countries visited, 2009

	Overnight visits		
	Visits	Nights	Spending in country
	thousands		CAN\$ millions
United States	17,977	142,627	12,667
Mexico	1,209	12,306	1,310
Cuba	979	8,428	805
Dominican Republic	876	7,401	790
United Kingdom	873	10,503	986
France	735	8,606	906
Italy	362	3,702	484
Germany	312	2,921	265
China	264	5,441	445
Netherlands	260	2,041	195
Spain	218	2,367	284
Hong Kong	213	3,339	243
Republic of Ireland	173	1,889	210
Switzerland	147	1,080	100
Greece	137	2,242	219

Source: Statistics Canada, Tourism and the Centre for Education Statistics.

Table 31.11 Travel by Canadians to the United States, top 15 states visited, 2009

	Overnight visits		
	Visits	Nights	Spending in state
	thousands		CAN\$ millions
New York	2,946	8,327	921
Florida	2,644	47,448	3,139
Washington	2,056	5,844	475
Michigan	1,293	3,348	295
Nevada	1,292	5,864	1,120
California	1,233	10,781	1,143
Maine	836	2,787	265
Pennsylvania	759	1,860	148
Vermont	741	2,115	161
Massachusetts	645	2,426	264
North Dakota	586	1,238	172
Montana	583	1,725	173
Arizona	557	8,948	602
Ohio	557	1,441	132
Virginia	553	1,703	118

Source: Statistics Canada, Tourism and the Centre for Education Statistics.

Table 31.12 Non-resident travellers entering Canada, by transportation type, 2006 to 2010

	2006	2007	2008	2009	2010
	thousands				
Total non-residents	33,390.2	30,373.5	27,370.1	24,695.7	24,669.1
All U.S. residents	28,872.7	25,694.6	22,605.6	20,525.6	20,213.5
By automobile	22,064.9	19,124.9	16,469.9	14,889.2	14,361.6
By plane	4,175.6	4,028.8	3,805.8	3,472.8	3,670.0
By train	123.3	129.7	132.3	123.0	145.0
By bus	1,069.6	941.2	832.3	700.6	771.8
By boat	955.5	1,001.0	971.5	993.5	911.8
By other methods	483.8	469.0	393.9	346.4	353.3
All residents of countries other than the United States	4,517.5	4,678.9	4,764.5	4,170.1	4,455.6
By land	487.6	498.6	541.9	519.2	598.5
By air	3,904.0	4,037.0	4,060.9	3,501.4	3,697.3
By sea	126.0	143.3	161.7	149.6	159.8

Source: Statistics Canada, CANSIM, table 427-0001.

Table 31.13 International travellers entering or returning to Canada, by province and territory, selected years, 1990 to 2010

	1990	1995	2000	2005	2010
	number				
Canada	117,322,676	104,678,591	105,245,675	89,310,407	85,679,671
Newfoundland and Labrador	140,312	108,133	169,094	216,057	170,203
Prince Edward Island	1,473	6,237	3,051	5,974	3,806
Nova Scotia	449,036	483,609	657,707	563,929	550,436
New Brunswick	11,889,350	8,099,495	7,002,754	6,360,850	4,960,774
Quebec	13,480,261	11,622,463	11,649,573	10,660,337	11,030,333
Ontario	60,753,698	57,659,539	60,605,956	48,734,156	43,350,975
Manitoba ¹	2,772,789	2,186,079	2,228,052	2,047,184	2,260,009
Saskatchewan	1,041,207	784,052	654,759	575,708	819,200
Alberta	1,940,788	2,079,296	2,504,290	2,690,293	3,702,754
British Columbia	24,554,227	21,308,741	19,380,687	17,044,443	18,414,878
Yukon	299,535	340,947	389,752	411,476	416,303
Nunavut ²	..	..	2,521	3,569	2,784

1. Data for the Northwest Territories are reported with Winnipeg, Manitoba, and are not available separately.

2. Data for Iqaluit only.

Source: Statistics Canada, CANSIM table 427-0001.

Table 31.14 International travel account, 2009

	Receipts	Payments	Balances
	\$ millions		
All countries			
Travel, total	15,520	27,692	-12,172
Business travel	2,528	3,520	-993
Crew spending	145	209	-64
Other business travel	2,383	3,311	-929
Personal travel	12,992	24,172	-11,180
Health related	134	418	-283
Education related	3,215	1,404	1,810
Other personal travel	9,643	22,350	-12,707
United States			
Travel, total	7,063	15,772	-8,708
Business travel	1,526	2,146	-619
Crew spending	115	190	-75
Other business travel	1,411	1,955	-544
Personal travel	5,537	13,626	-8,089
Health related	99	388	-289
Education related	254	891	-637
Other personal travel	5,184	12,346	-7,163
All other countries			
Travel, total	8,456	11,920	-3,464
Business travel	1,001	1,375	-373
Crew spending	30	19	11
Other business travel	971	1,356	-385
Personal travel	7,455	10,546	-3,091
Health related	35	29	6
Education related	2,960	513	2,447
Other personal travel	4,459	10,003	-5,544

Source: Statistics Canada, CANSIM table 376-0031.