



# Travel Characteristics Q2 2010

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This publication provides an in-depth overview of the travel characteristics of the Canadian Tourism Commission's key international markets with, a focus on the average spend per night in Canada, CTC's yield performance metric. The report is primarily based on data and figures from Statistics Canada's International Travel Survey.

**For more data and market information on CTC key markets visit:**

[www.canada.travel/research](http://www.canada.travel/research) (Research & Intelligence)

### Key Highlights

- In the second quarter of 2010 overall CTC key markets posted gains in the average spend per trip of 2.3% reaching \$668 and a 2.5% increase in the average spend per night to \$109.
- Combined Asia-Pacific markets recorded a significant 29.0% surge in total spending, reaching \$314.6 million. This gain contributed to this region posting the highest regional average spend per trip of \$1,518, a 2.9% increase over Q2 2009.
- From January to June, Brazil continued to post the strongest increases in total spend (+27.6%) among CTC key markets. The average trip duration grew 9.6% to 18 nights and despite a moderate decline of 0.3%, Brazil posted a strong average spend per trip of \$1,719.



# Overview of overnight Travel Characteristics from CTC key markets

Q2 2010

Table 1 Travel Characteristics from key international CTC program sector areas

	Trips '000	10/09 Q2 %	Spending \$ M	10/09 Q2 %	Average trip Duration (nights)	10/09 Q2 %	Average Spend per Trip	10/09 Q2 %	Average Spend per Night	10/09 Q2 %
Americas	3,095	-3.0%	1,635.6	-1.6%	4.1	-6.4%	529	1.4%	130	8.3%
European	370	4.2%	476.2	-3.3%	13.4	-4.0%	1,286	-7.2%	96	-3.3%
Asia/Pacific	207	25.3%	314.6	29.0%	18.8	1.6%	1,518	2.9%	81	1.2%
Emerging	68	20.9%	71.3	19.2%	20.4	-0.7%	1,046	-1.5%	51	-0.8%
<b>Total Key Markets</b>	<b>3,740</b>	<b>-0.7%</b>	<b>2,497.7</b>	<b>1.6%</b>	<b>6.1</b>	<b>-0.2%</b>	<b>668</b>	<b>2.3%</b>	<b>109</b>	<b>2.5%</b>
<b>Other Countries</b>	<b>443</b>	<b>4.5%</b>	<b>543.3</b>	<b>-1.7%</b>	<b>14.5</b>	<b>-11.6%</b>	<b>1,226</b>	<b>-6.0%</b>	<b>85</b>	<b>6.3%</b>
<b>Total Countries</b>	<b>4,184</b>	<b>-0.2%</b>	<b>3,041.0</b>	<b>1.0%</b>	<b>7.0</b>	<b>-2.3%</b>	<b>727</b>	<b>1.1%</b>	<b>104</b>	<b>3.5%</b>

Source: Statistics Canada, International Travel Survey, preliminary estimates

\*Americas Key Markets include the U.S. and Mexico

\*Asia/Pacific Key Markets include Japan, South Korea, China and Australia

\*European Key Markets include the U.K., France and Germany

\*Emerging Key Markets include Brazil and India

- There were approximately 4.2 million overnight arrivals in Canada between April and June 2010, a moderate 0.2% decline over the same period in 2009. However, total overnight spending during this period grew by 1.0% to \$3.0 billion, with the average spend per trip increasing 1.1% to \$727;
- In the second quarter of 2010, inbound travel and related spending from Emerging markets (India and Brazil) and Asia-Pacific markets (Australia, Japan, South Korea and China) continued to strengthen. However, established European (UK, France and Germany) and Americas (US and Mexico) markets posted fluctuating improvements.
- Combined Asia-Pacific markets recorded a significant 29.0% surge in total spending, reaching \$314.6 million. This gain contributed to this region posting the highest average spend per trip of \$1,518, a 2.9% increase on Q2 2009.

# Travel Characteristics of overnight visitors from the Americas Q2 2010

Table 2 Travel Characteristics from Americas overnight visitors to Canada

	Trips '000	10/09 Q1-Q2%	Spend \$ M	10/09 Q1-Q2%	Average Trip Duration (nights)	10/09 Q1-Q2%	Average Spend per Trip	10/09 Q1-Q2%	Average Spend per Night	10/09 Q1-Q2%
<b>United States Leisure</b>										
Automobile	2,465	-5.4%	889.4	-3.2%	3.5	-5.6%	361	2.3%	103	8.4%
Plane	813	5.1%	602.2	5.3%	5.4	0.6%	741	0.1%	138	-0.5%
Other	471	1.1%	186.5	2.8%	2.8	-1.0%	396	1.6%	140	2.7%
<b>U.S. Leisure Total</b>	<b>3,736</b>	<b>-2.8%</b>	<b>1,675.2</b>	<b>0.2%</b>	<b>3.8</b>	<b>-2.6%</b>	<b>448</b>	<b>3.1%</b>	<b>117</b>	<b>5.9%</b>
<b>Total U.S. MC &amp; IT</b>	<b>402</b>	<b>-1.2%</b>	<b>304.7</b>	<b>-3.4%</b>	<b>3.1</b>	<b>5.5%</b>	<b>758</b>	<b>-2.2%</b>	<b>246</b>	<b>-7.3%</b>
<b>Total U.S.</b>	<b>4,624</b>	<b>-2.2%</b>	<b>2,415.4</b>	<b>0.9%</b>	<b>3.7</b>	<b>-1.5%</b>	<b>522</b>	<b>3.2%</b>	<b>140</b>	<b>4.8%</b>
<b>Mexico</b>	<b>52</b>	<b>-43.2%</b>	<b>67.2</b>	<b>-50.3%</b>	<b>24.1</b>	<b>-3.2%</b>	<b>1289</b>	<b>-12.5%</b>	<b>54</b>	<b>-9.6%</b>
<b>Americas Total</b>	<b>4,676</b>	<b>-3.0%</b>	<b>2,482.5</b>	<b>-1.8%</b>	<b>4.0</b>	<b>-5.6%</b>	<b>531</b>	<b>1.2%</b>	<b>134</b>	<b>7.2%</b>

Source: Statistics Canada, International Travel Survey, preliminary estimates

- In the first six months of 2010, the Americas market (the US and Mexico) continued to post declines in overnight trip arrivals (-3.0%). However, the decline in total overnight spending were softer, falling by 1.8% to \$2.5 billion, with an increase in the average spend per night to \$134, up 7.2%;
- During January and June 2010, US spending kept a moderate pace, strengthening by 0.9% to reach \$2.4 billion. Increases were also posted in the average spend per night and the average spend per trip of 4.8% and 3.2% respectively over the same period in 2009;
- In the second quarter of 2010 travel for the main purpose of visiting friend and relatives (VFR) improved by 5.1% compared with Q2 2009. However there were notable declines in both pleasure and “other” trips of 5.4% and 17.8% respectively. In Q2, there was a slight rebound in business travel with meetings, conventions and incentive travel (MC&IT) increasing by 1.3% over the same period in 2009. Pleasure travel represents the largest proportion of US overnight travellers to Canada at 51.1%, followed by VFR and “other” travel at 20.0% and 17.3% respectively in Q2 2010 (refer to Chart 1).

Chart 1 U.S. visitor arrivals by main trip purpose Q2 2010

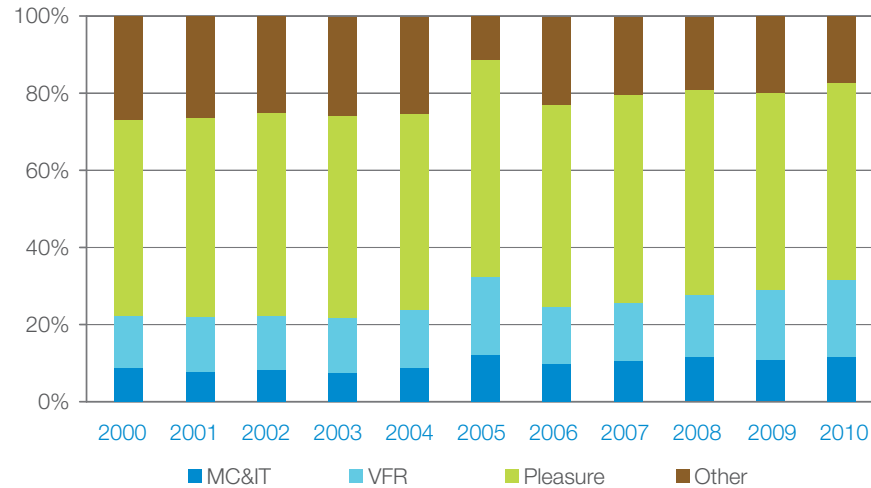
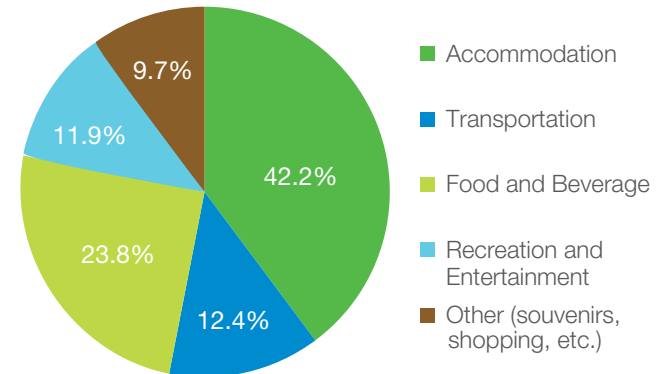


Chart 2 U.S. total overnight spend Q2 2010



### U.S. leisure travel characteristics

(refer to Table 2)

- In the first six months of 2010, 80.7% of Americans visited Canada for leisure; overall there was a moderate 0.2% increase in US leisure spending with improvements in average spend per trip (+3.1%) and spend per night (+5.9%), over 2009.

### U.S. MC&IT travel characteristics

(refer to Table 2)

- From January to June 2010, business travellers' spend rebounded, increasing 2.6% to \$740.2 million over the same period in 2009. The average length of stay for an MC&IT visitor increased by 4.7% to three nights, and was accompanied by an average spend per trip also growing by 2.2% to \$833.

### Mexico

(refer to Table 2)

- Mexico continued to post declines in total visitor spending, down 50.3% in the first six months of 2010. The average trip duration of Mexican visitors to Canada during this period declined by 3.2% to 24 days, and was accompanied by a 12.5% drop in the average spend per trip to \$1,289.

Table 3 Key U.S. states travel characteristics

Key U.S. Regions	Trips '000	10/09 %Q1-Q2	Spend \$ M	10/09 %Q1-Q2	Average Trip Duration (nights)	10/09 %Q1-Q2	Average Spend per Trip	10/09 %Q1-Q2	Average Spend per Night	10/09 %Q1-Q2
New York	652	-6.3%	221.8	-4.1%	5.2	-8.7%	340	2.4%	127	10.7%
California	308	11.6%	203.8	9.1%	9.4	2.6%	662	-2.3%	142	-5.5%
Pennsylvania	198	10.0%	85.1	2.2%	7.2	0.6%	430	-7.1%	120	-5.1%
Massachusetts	181	-6.7%	85.1	3.9%	6.8	-6.6%	470	11.4%	133	19.3%
Illinois	164	3.8%	107.7	13.0%	9.3	-4.3%	656	8.9%	131	14.3%
New Jersey	155	4.0%	91.8	17.7%	7.9	7.7%	592	13.2%	155	9.4%
Texas	145	-9.9%	124.5	-3.6%	11.2	28.3%	859	7.0%	160	-6.1%
Connecticut	83	3.8%	34.5	2.4%	7.1	6.1%	415	-1.3%	117	-7.3%
District of Columbia	11	22.2%	11.1	47.4%	8.8	15.0%	1012	20.6%	247	11.4%
<b>Total U.S. Key States</b>	<b>1897</b>	<b>-0.3%</b>	<b>965.4</b>	<b>4.2%</b>	<b>3.7</b>	<b>-0.1%</b>	<b>509</b>	<b>4.5%</b>	<b>137</b>	<b>4.6%</b>
<b>Total U.S.</b>	<b>4624</b>	<b>-2.2%</b>	<b>2415.4</b>	<b>0.9%</b>	<b>3.7</b>	<b>-1.5%</b>	<b>522</b>	<b>3.2%</b>	<b>140</b>	<b>4.8%</b>

Source: Statistics Canada, International Travel Survey, preliminary estimates

- Key US states represented 41.0% of total US trips to Canada and 40.0% of total travel related spending during the first six months of 2010. The average spend per night for key US states was \$137, a 4.6% increase over the same period in 2009; jumping 15.0% to eight nights, the state posted the highest average spend per trip and spend per night of \$1,012 and \$247 respectively among CTC key US states.
- California continued to post gains in 2010, with overnight arrivals and total spending increasing by 11.6% and 9.1% respectively. The average trip duration increased by 2.6% to nine nights, but was accompanied by a 2.3% drop in the average spend per trip;
- From January to June 2010, the District of Columbia posted a significant 22.2% increase in overnight arrivals to Canada and a 47.4% leap in total spending, reaching \$11.1 million. With the average trip length

Table 4 Travel Characteristics of U.S. provincial visits

	Province Visits	10/09 %Q1-Q2	Spending \$M	10/09 %Q1-Q2	Average Trip Duration (nights)	10/09 %Q1-Q2	Spend per Visit	10/09 %Q1-Q2	Spend per Night	10/09 %Q1-Q2
Newfoundland	15,800	27.4%	20.2	105.3%	8.5	7.6%	1277	61.1%	150	49.8%
Prince Edward Island	29,500	3.1%	14.1	22.7%	3.9	7.2%	477	18.9%	123	10.9%
Nova Scotia	68,000	2.4%	44.5	7.4%	5.6	-6.1%	655	4.9%	118	11.7%
New Brunswick	86,700	2.0%	24.8	-15.9%	3.3	-20.5%	286	-17.5%	88	3.7%
Québec	743,200	5.6%	432.8	5.6%	3.7	3.4%	582	0.0%	156	-3.3%
Ontario	2,176,500	-8.1%	905.9	-7.1%	3.2	-4.7%	416	1.1%	128	6.1%
Manitoba	83,000	0.5%	46.8	-4.0%	3.4	-30.7%	564	-4.4%	165	37.9%
Saskatchewan	52,800	0.2%	32.6	-11.0%	3.6	-8.1%	618	-11.2%	170	-3.4%
Alberta	315,300	-0.8%	217.0	3.6%	4.9	14.8%	688	4.5%	141	-9.0%
British Columbia	1,238,100	1.7%	647.6	8.0%	3.4	-0.3%	523	6.2%	152	6.5%
Yukon	68,100	0.0%	19.5	5.1%	2.4	-1.2%	287	5.1%	120	6.4%
Northwest Territories	4,600	53.3%	9.5	227.9%	9.1	153.6%	2075	113.9%	227	-15.7%
<b>Total</b>	<b>4,881,600</b>	<b>-2.5%</b>	<b>2,415.4</b>	<b>0.9%</b>	<b>3.5</b>	<b>-1.3%</b>	<b>495</b>	<b>3.5%</b>	<b>140</b>	<b>4.8%</b>

Source: Statistics Canada, International Travel Survey, preliminary estimates

- The total spending by US province visitors improved by 0.9% from January to June 2010, with the Northwest Territories, Newfoundland and Labrador and Prince Edward Island seeing significant increases of 227.9%, 105.3% and 22.7% respectively over the same period in 2009;
- From January to June 2010, US visitors spent \$46.8 million while visiting Manitoba, a 4.0% decline over 2009. However, with a significant 30.7% drop in the average trip duration to three nights, the average spend per night increased by 37.9% to \$165, well above the national average of \$140.
- Ontario posted the strongest total spend by US visitors of \$905.9 million, despite a 7.1% decline compared with the first six months of 2009. The average trip duration of US visitors to the province fell by 4.7% to three nights, with the average spend per night improving by 6.1% to \$128;

## Travel Characteristics of visitors from overseas key markets Q2 2010

Table 5 Travel Characteristics from overseas overnight visitors to Canada

Overseas Key Markets	Trips '000	10/09 %Q1-Q2	Spending \$ M	10/09 %Q1-Q2	Average Trip Duration (nights)	10/09 %Q1-Q2	Average Spend per Trip	10/09 %Q1-Q2	Average Spend per Night	10/09 %Q1-Q2
United Kingdom	295.3	-1.8%	378.3	-8.9%	12.0	-2.7%	1,281	-7.3%	107	-4.7%
France	160.2	10.0%	198.2	5.2%	15.4	-2.5%	1,325	2.4%	80	-1.9%
Germany	130.4	16.7%	189.4	8.8%	15.7	-3.0%	1,520	-2.4%	93	-3.9%
Japan	88.1	22.9%	136.4	24.0%	14.6	0.6%	1,491	-2.8%	106	0.3%
South Korea	71.4	19.8%	115.1	15.8%	26.7	-2.3%	1,612	-3.3%	60	-1.0%
China	77.9	10.0%	120.3	12.0%	27.9	-14.9%	1,634	7.7%	46	-0.2%
Australia	94.1	10.4%	154.7	15.8%	11.5	4.8%	1,644	4.8%	143	0.0%
India	72.4	17.0%	68.1	12.3%	21.6	-1.6%	941	-4.0%	44	-2.5%
Brazil	31.2	23.3%	55.7	27.6%	18.7	9.6%	1,719	-0.3%	95	-5.6%
<b>Total Overseas Key Markets</b>	<b>1021</b>	<b>9.5%</b>	<b>1416.2</b>	<b>6.3%</b>	<b>16.7</b>	<b>0.5%</b>	<b>1,387</b>	<b>-2.9%</b>	<b>83</b>	<b>-3.4%</b>

Source: Statistics Canada, International Travel Survey, preliminary estimates

- In the first two quarters of 2010, there was a 6.3% improvement in total spending by CTC key overseas markets, totalling \$1.4 billion and largely driven by rebounding Emerging and Asia-Pacific markets (refer to Table 3);
- In Q2 2010, overnight pleasure travel represented 34.5% of travel to Canada from overseas markets (excluding the US), while for the main purpose of visiting friends and relatives (VFR) represented 38.2%. There were notable double-digit increases in pleasure travel to Canada from Brazil (+29.2%), Japan (+21.2%) and the UK (+20.5%). Japan and Brazil also posted strong growth in VFR travel, up 120.3% and 29.4% respectively, while the UK saw a notable decline of 29.8% in VFR travel compared with Q2 2009 (refer to Chart 3);
- From April to June 2010, overseas markets spent \$271.7 million on accommodation and \$251.6 million on food and beverages, down 4.6% respectively over Q2 2009 (refer to Chart 4).



Chart 3 Overseas visitor arrivals by main purpose Q2 2010

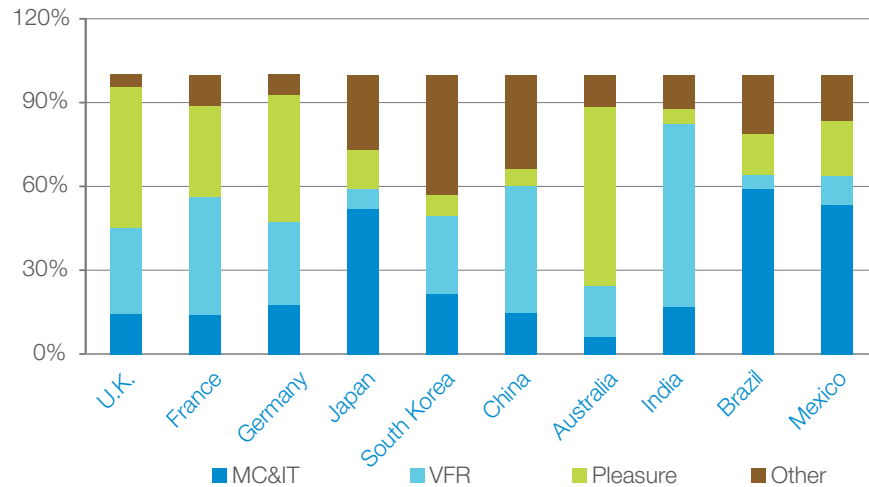
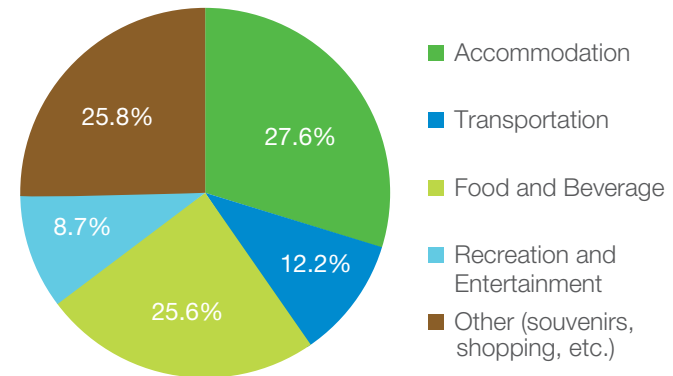


Chart 4 Overseas overnight total spend Q2 2010



## Europe

(refer to Table 5)

- In the first six months of 2010, the UK's total overnight spend declined 8.9% to \$378.3 million. Despite a 4.7% decline, the UK continues to post the second highest average spend per night of \$107, well above the \$83 average among CTC key overseas markets;
- France reported the second strongest total spend among CTC key markets (\$198.2 million) after boasting a 5.2% increase over the first two quarters of 2009. However, this market also reported the third lowest average spend per trip of \$1,325, despite experiencing a 2.4% increase;
- Germany posted record growth in both trip arrivals (+16.7%) and total spending of (+8.8%). The average trip duration fell 3.0% to 15 nights, with the average spend per trip declining 2.4% to \$1,520.

## Asia

(refer to Table 5)

- In Q1 and Q2 2010, Australia reported the highest total spend among CTC Asia/Pacific markets a 15.8% increase from a total of \$154.7 million. This market also posted the highest average spend per night of \$143 and the second strongest average spend per trip of \$1,644;
- Despite experiencing a 14.9% decline, China reported the longest average trip duration among CTC core markets (27 nights), among CTC key markets, well above the average of 16 nights. Partly due to this decline, China saw a 7.7% increase in the average spend per trip, the third highest among CTC's key markets.

## Emerging

(refer to Table 5)

- From January to June, Brazil continued to post the strongest increases in total spend (+27.6%) among CTC key markets. The average trip duration grew 9.6% to 18 nights and despite a moderate decline of 0.3%, Brazil still posted the highest average spend per trip of \$1,719;
- The number of overnight trips saw a greater increase relative to the increase in spending by Indian tourists. However, their average spend per night fell by 2.5% to \$44, as they shortened their average trip duration by 1.6% to 21 nights.
- Total spending by Indian visitors to Canada increased by 12.3 reaching 68.1 million in Q1 and Q2 2010. This gain in spending and total visitation (+17.0%) resulted in an average nightly spend of \$44 for this market.

Table 6 Travel Characteristics of overseas province visits

	Province Visits	10/09 %Q1-Q2	Spending \$M	10/09 %Q1-Q2	Average Trip Duration (nights)	10/09 %Q1-Q2	Spend per Visit	10/09 %Q1-Q2	Spend per Night	10/09 %Q1-Q2
Newfoundland	7,100	-12.3%	7.7	29.5%	12.8	92.3%	1,083	47.8%	85	-23.2%
Prince Edward Island	10,100	14.8%	7.0	8.3%	11.5	49.5%	691	-5.7%	60	-36.9%
Nova Scotia	62,400	23.3%	70.3	45.3%	14.3	26.1%	1,126	17.8%	79	-6.6%
New Brunswick	24,100	47.9%	19.1	49.9%	12.9	-31.6%	793	1.4%	61	48.2%
Quebec	390,300	1.5%	405.6	-4.1%	13.2	4.6%	1,039	-5.5%	79	-9.7%
Ontario	733,800	0.3%	668.5	-1.0%	11.4	-10.9%	911	-1.2%	80	10.9%
Manitoba	24,600	-7.5%	16.7	5.9%	13.6	22.8%	680	14.5%	50	-6.7%
Saskatchewan	28,500	25.6%	18.8	3.5%	17.6	15.6%	658	-17.6%	37	-28.7%
Alberta	307,700	-5.5%	322.3	-10.1%	11.6	-3.5%	1,048	-4.9%	90	-1.5%
British Columbia	624,300	9.5%	831.6	8.1%	15.6	-1.8%	1,332	-1.3%	85	0.5%
Yukon	13,700	-25.9%	8.9	-47.1%	5.4	-16.0%	652	-28.6%	121	-15.0%
Northwest Territories	3,400	-40.4%	2.2	-55.2%	4.1	-15.6%	635	-24.9%	153	-11.0%
<b>Total</b>	<b>2,230,100</b>	<b>2.8%</b>	<b>2,378.7</b>	<b>1.0%</b>	<b>13.1</b>	<b>-2.1%</b>	<b>1,067</b>	<b>-1.7%</b>	<b>81</b>	<b>0.4%</b>

Source: Statistics Canada, International Travel Survey, preliminary estimates

- In the first six months of 2010, total spending by overseas province visitors (excluding the US) improved moderately by 1.0%, to \$2.4 billion. The average spend per night increased by 0.4% to \$81 partly influenced by an 2.1% decrease in the average trip duration. New Brunswick (+48.2%), Ontario (+10.9%) and British Columbia (+0.5%) were the only provinces to post increases in the average spend per night during this period;
- British Columbia registered a significant lead in total spending by overseas visitors, reaching \$831.6 million after a 8.1% increase over the first six months of 2009; In addition, overseas visitors to British Columbia posted the strongest average spend per visit of \$1,332 despite a slight decline of 1.3%;
- Nova Scotia posted a notable 45.3% increase in the total spending of overseas visitors, reaching \$70.3 million. Largely influenced by a 26.1% jump in the average trip length to 14 nights, the average spend per visit grew by 17.8% to \$1,126, the second highest compared with the other provinces and territories.