



Canadian Tourism  
Commission

Commission canadienne  
du tourisme

# Travel Characteristics

## Q3 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 third quarter of 2010, combined CTC Asia-Pacific markets (Japan, South Korea, China and Australia) reported the highest average spend per trip of \$1,666 with an average trip duration of 17 nights.
- From January to September, Brazil posted the strongest increases in total overnight travel spend (+47.2%) among CTC key markets, while boasting the third highest average spend per night of \$115, a notable year-over-year increase.
- British Columbia continued to hold the lead in total spending by overseas province visitors (all inbound travel markets excluding the US) with a 4.7% increase over the first three quarters of 2009. British Columbia also saw growth (+7.2%) in the total spend from US province visitors in the first nine months of 2010, reaching 1.3 million and increases in both spend per night and per trip of 6.3% and 6.0% respectively.



# Overview of overnight Travel Characteristics from CTC key markets

Q3 2010

Table 1 Travel Characteristics from key international CTC program sector areas

	Trips '000	10/09 Q1-Q3 %	Spending \$ M	10/09 Q1-Q3 %	Average trip Duration (nights)	10/09 Q1-Q3 %	Average Spend per Trip	10/09 Q1-Q3 %	Average Spend per Night	10/09 Q1-Q3 %
Americas	5,007	1.8%	2,819.2	3.1%	4.6	-2.2%	563	1.2%	124	3.5%
European	587	3.1%	777.3	-1.8%	15.5	-4.9%	1,324	-4.7%	85	0.2%
Asia/Pacific	277	20.1%	461.6	23.3%	17.5	0.4%	1,666	2.6%	95	2.2%
Emerging	78	32.5%	102.0	49.5%	17.3	-11.3%	1,304	12.8%	76	27.2%
<b>Total Key Markets</b>	<b>5,949</b>	<b>3.0%</b>	<b>4,160.1</b>	<b>4.8%</b>	<b>6.4</b>	<b>-0.9%</b>	<b>699</b>	<b>1.8%</b>	<b>109</b>	<b>2.7%</b>
<b>Other Countries</b>	<b>654</b>	<b>5.9%</b>	<b>882.5</b>	<b>7.2%</b>	<b>16.6</b>	<b>-2.0%</b>	<b>1,350</b>	<b>1.2%</b>	<b>82</b>	<b>3.2%</b>
<b>Total Countries</b>	<b>6,603</b>	<b>3.3%</b>	<b>5,042.6</b>	<b>5.2%</b>	<b>7.4</b>	<b>-0.8%</b>	<b>764</b>	<b>1.9%</b>	<b>103</b>	<b>2.7%</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

- In the third quarter of 2010, CTC key markets posted gains in the average spend per night of 2.7%, reaching an average of \$103. There was also a 1.9% increase in the average spend per trip to \$764;
- Combined emerging markets (India and Brazil) saw total spending rise 49.5%, when compared with Q3 2009. The average spend per night grew from \$60 in Q3 2009 to \$76 in Q3 2010;
- From July to September 2010, 23.8% of all overnight arrivals to Canada came from CTC combined Asia-Pacific markets. On average, this region reported the highest spend per trip of \$1,666 with an average trip duration of 17 nights.
- 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 Q3 2010

Table 2 Travel Characteristics from Americas overnight visitors to Canada

	Trips '000	10/09 Q1-Q3%	Spend \$ M	10/09 Q1-Q3%	Average Trip Duration (nights)	10/09 Q1-Q3%	Average Spend per Trip	10/09 Q1-Q3%	Average Spend per Night	10/09 Q1-Q3%
United States Leisure										
Automobile	5,406	-1.0%	2,167.1	0.9%	4.0	-3.8%	401	1.9%	100	5.9%
Plane	1,663	4.0%	1370.5	3.2%	5.7	1.8%	824	-0.8%	144	-2.5%
Other	1,188	0.8%	529.1	9.5%	3.2	5.0%	445	8.7%	141	3.5%
U.S. Leisure Total	8,257	0.2%	4,066.7	2.7%	4.2	-1.2%	493	2.5%	117	3.7%
Total U.S. MC & IT	1,330	-1.7%	1,116.1	1.6%	3.4	2.0%	839	3.4%	244	1.4%
Total U.S.	9,588	-0.1%	5,182.8	2.5%	4.1	-0.8%	541	2.5%	131	3.3%
Mexico	96	-33.9%	131.2	-36.6%	22.8	-0.4%	1,362	-4.1%	60	-3.7%
<b>Americas Total</b>	<b>9,684</b>	<b>-0.6%</b>	<b>5,314.0</b>	<b>0.9%</b>	<b>4.3</b>	<b>-2.9%</b>	<b>549</b>	<b>1.5%</b>	<b>128</b>	<b>4.5%</b>

Source: Statistics Canada, International Travel Survey, preliminary estimates

- In the first nine months of 2010, the Americas market (the US and Mexico) began to rebound, posting a moderate increase in visitor arrivals of 0.6%. The average spend per night improved by 4.5% to \$128 and the average spend per trip rose by 1.5% to \$549;
- There was a 0.1% drop in total overnight arrivals to Canada from the US in the first three quarters of 2010 over the same period in 2009. The average trip length also fell by 0.8% to four nights;
- During January to September 2010, US overall spending strengthened by 2.5% to reach \$5.2 billion. Other increases: the average spend per night and the average spend per trip rose 3.3% and 2.5% respectively over the same period in 2009;
- From July to September 2010, the number of overnight US visitors that travelled for a holiday and/or visit friends and family increased by 4.2% and 3.5% respectively over the same period in 2009 (refer to Chart 1);
- In the third quarter of 2010, total spending by overnight visitors from the US on food and beverages and on accommodation increased by 7.3% and 6.0% respectively, while spending on transportation fell by 0.9% over Q3 2009 (refer to Chart 2).

Chart 1 U.S. visitor arrivals by main trip purpose Q3 2010

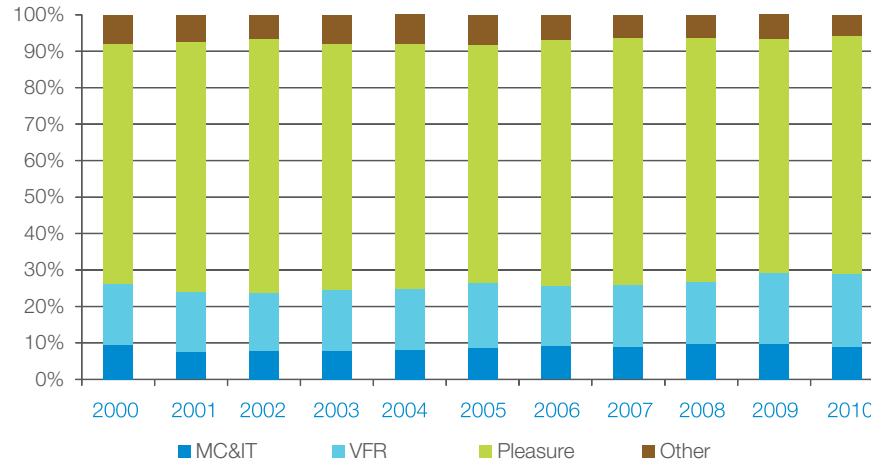
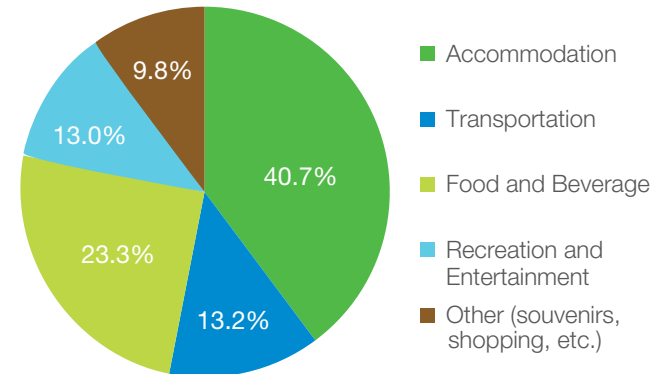


Chart 2 U.S. total overnight spend Q3 2010



## U.S. leisure travel characteristics

(refer to Table 2)

- In the first nine months of 2010, 86.1% of Americans visited Canada for leisure travel. Overall, US leisure spending improved by 2.7% to \$4.1 billion, with the average spend per night (+3.7%) and spend per trip (+2.5%) rising over 2009.

## U.S. MC&IT travel characteristics

(refer to Table 2)

- From January to September 2010, US business travellers' spend increased by 1.6% to \$1.1 billion over the same period in 2009. The average length of stay for a MC&IT visitor increased by 2.0% to three nights, and was accompanied by an average spend per trip increase of 3.4% to \$839.

## Mexico

(refer to Table 2)

- In the first three quarters of 2010, total spending by overnight visitors from Mexico fell 36.6% to \$131 million. The average spend per trip and per night also contracted by 4.1% and 3.7% respectively.

Table 3 Key U.S. states travel characteristics

Key U.S. Regions	Trips '000	10/09 %Q1-Q3	Spend \$ M	10/09 %Q1-Q3	Average Trip Duration (nights)	10/09 %Q1-Q3	Average Spend per Trip	10/09 %Q1-Q3	Average Spend per Night	10/09 %Q1-Q3
New York	1,325	-2.1%	466.7	-5.0%	8.9	-8.6%	352	-2.9%	111	4.8%
California	674	10.9%	486.6	11.8%	15.6	6.0%	722	0.8%	132	-5.7%
Pennsylvania	485	4.1%	226.4	14.9%	11.1	5.3%	467	10.4%	124	2.1%
Massachusetts	387	-5.1%	191.1	-4.6%	11.3	-5.6%	494	0.6%	121	5.9%
Illinois	351	2.6%	250.9	12.1%	14.9	1.4%	715	9.2%	136	6.6%
New Jersey	353	7.3%	215.6	12.9%	12.4	1.7%	611	5.3%	145	8.1%
Texas	287	-12.0%	257.0	-1.4%	16.4	17.2%	896	12.0%	171	6.0%
Connecticut	159	-2.5%	71.0	-5.6%	10.8	-3.8%	447	-3.2%	124	5.4%
District of Columbia	24	-4.0%	18.2	12.0%	12.4	-6.1%	758	16.7%	193	43.0%
Total U.S. Key States	4,045	0.6%	2,183.5	4.4%	4.1	0.1%	540	3.8%	130	3.7%
Total U.S.	9,588	-0.1%	5,182.8	2.5%	4.1	-0.8%	541	2.5%	131	3.3%

Source: Statistics Canada, International Travel Survey, preliminary estimates

- Key US states represented 42.2% of total US overnight trips to Canada and 42.1% of total travel related spending during the first nine months of 2010. The average spend per night for visitors from key US states was \$131, a 3.3% increase over the same period in 2009;
- From January to September 2010, Pennsylvania total overnight spending in Canada grew by 14.9% to \$226.4 million, with the average trip duration increasing by 5.3% to 11 nights and the average spend per trip rising by 10.4% to \$467.
- California posted strong growth in the first three quarters of 2010, with overnight arrivals and total spending increasing by 10.9% and 11.8% respectively. After Texas, California reported the longest average trip duration (16 nights ) while visiting Canada and reported a moderate 0.8% increase in the average spend per trip over the same period in 2009;

Table 4 Travel Characteristics of U.S. provincial visits

	Province Visits	10/09 %Q1-Q3	Spending \$M	10/09 %Q1-Q3	Average Trip Duration (nights)	10/09 %Q1-Q3	Spend per Visit	10/09 %Q1-Q3	Spend per Night	10/09 %Q1-Q3
Newfoundland	48,000	13.5%	51.3	20.2%	9.6	3.0%	1069	6.0%	112	2.9%
Prince Edward Island	109,600	7.7%	40.1	-1.6%	3.3	-8.3%	366	-8.6%	110	-0.4%
Nova Scotia	260,300	14.7%	176.0	10.7%	5.6	-2.6%	676	-3.5%	121	-0.9%
New Brunswick	310,900	1.0%	74.5	-2.8%	2.9	-4.7%	240	-3.7%	83	1.0%
Québec	1,450,300	5.3%	840.8	4.2%	3.8	0.4%	580	-1.0%	153	-1.4%
Ontario	4,537,700	-3.5%	1,973.8	-0.2%	3.7	-3.3%	435	3.5%	118	7.0%
Manitoba	172,300	1.0%	89.3	-10.2%	3.8	-15.6%	518	-11.1%	138	5.3%
Saskatchewan	112,800	-3.8%	71.2	-6.2%	4.5	14.3%	631	-2.5%	139	-14.7%
Alberta	671,500	0.2%	462.2	1.0%	5.1	10.9%	688	0.8%	135	-9.1%
British Columbia	2,494,400	1.1%	1,304.9	7.2%	3.6	-0.3%	523	6.0%	147	6.3%
Yukon	176,100	6.3%	57.8	-4.5%	2.6	0.2%	328	-10.2%	125	-10.4%
Northwest Territories	15,000	-5.7%	40.9	-5.7%	10.8	14.2%	2727	-0.1%	254	-12.5%
<b>Total</b>	<b>10,358,900</b>	<b>-0.1%</b>	<b>5,182.8</b>	<b>2.5%</b>	<b>3.8</b>	<b>-0.8%</b>	<b>500</b>	<b>2.5%</b>	<b>131</b>	<b>3.3%</b>

Source: Statistics Canada, International Travel Survey, preliminary estimates

- The total overnight spending by US province visits strengthened by 2.5% to \$5.2 billion during January to September 2010. During this period, Newfoundland and Labrador (+20.2%), Nova Scotia (+10.7%) and British Columbia (+7.2%) posted the most significant increases in total spending by US overnight visitors;
- From January to September 2010, the Northwest Territories reported the highest average spend per night of \$254 despite a decline of 12.5%, followed Quebec at \$153 per night and British Columbia at \$147 per night.
- Year-to-date September 2010, British Columbia reported a 6.0% increase in the average spend per US overnight visit, with gains in the average spend per visit also seen in Ontario (+3.5%) and Alberta (+0.8%). During this period, Quebec posted a moderate decline in average spend per US overnight visit of -1.0%;

# Travel Characteristics of visitors from overseas key markets Q3 2010

Table 5 Travel Characteristics from overseas overnight visitors to Canada

Overseas Key Markets	Trips '000	10/09 %Q1-Q3	Spending \$ M	10/09 %Q1-Q3	Average Trip Duration (nights)	10/09 %Q1-Q3	Average Spend per Trip	10/09 %Q1-Q3	Average Spend per Night	10/09 %Q1-Q3
United Kingdom	552.8	-1.5%	678.3	-9.4%	13.2	-2.6%	1,227	-8.0%	93	-5.6%
France	343.4	6.8%	446.8	3.1%	15.7	-1.1%	1,325	-1.7%	83	-2.3%
Germany	275.7	12.6%	423.6	9.3%	17.3	-3.4%	1,520	-4.0%	89	0.4%
Japan	168.2	23.5%	275.5	26.3%	14.0	-1.7%	1,491	-6.9%	117	4.0%
South Korea	129.1	21.2%	203.6	16.3%	25.1	-1.6%	1,577	-4.0%	63	-2.5%
China	154.1	21.9%	243.2	24.0%	27.9	1.4%	1,634	5.3%	58	3.6%
Australia	189.5	27.3%	312.5	32.6%	13.3	9.6%	1,649	4.2%	124	-5.0%
India	124.1	20.8%	121.6	23.0%	20.8	-3.1%	980	1.8%	47	5.0%
Brazil	57.6	32.4%	108.3	47.2%	16.3	-3.2%	1,719	1.6%	115	14.8%
<b>Total Overseas Key Markets</b>	<b>1995</b>	<b>11.3%</b>	<b>2813.3</b>	<b>9.6%</b>	<b>16.7</b>	<b>-0.3%</b>	<b>1,411</b>	<b>-1.5%</b>	<b>85</b>	<b>-1.3%</b>

Source: Statistics Canada, International Travel Survey, preliminary estimates

- In the first three quarters of 2010, there was a 9.3% improvement in total spending by CTC key overseas markets totalling \$2.8 billion; this gain was largely driven by a surge in spending by visitors from CTC's Emerging and Asia-Pacific markets (refer to Table 5);
- In Q3 2010, overnight pleasure travel represented 43.5% of travel to Canada from CTC's overseas markets (excluding the US), while travel for the main purpose of visiting friends and relatives (VFR) represented 35.7%. This quarter, there was a moderate lift in business travel from total overseas visitors (+3.0%) with South Korea (+5.7%), Japan (+3.7%), Germany (+3.3%) and France (2.9%) posting increases over Q3 2009 (refer to Chart 3);
- In Q3 2010, visitors from CTC's overseas markets spent \$478.5 million on accommodation and \$235.3 million on food and beverages, an increase of 9.1% and 5.8% respectively over Q3 2009 (refer to Chart 4).



Chart 3 Overseas visitor arrivals by main purpose Q3 2010

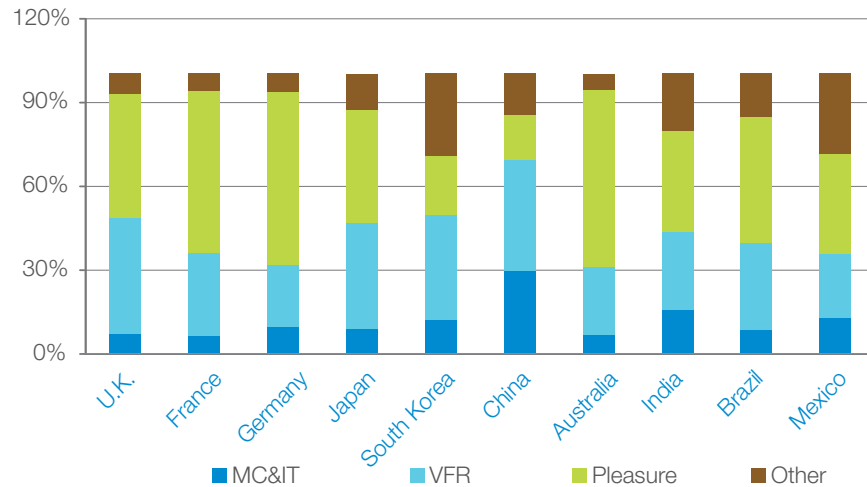
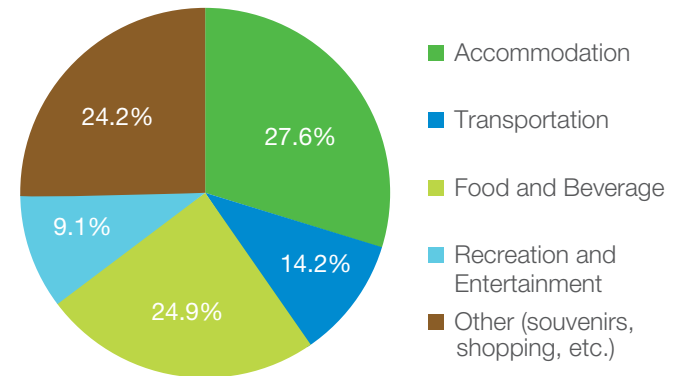


Chart 4 Overseas overnight total spend Q3 2010



## Europe

(refer to Table 5)

- The UK posted slower growth in the first nine months of 2010, with a 9.4% year-over year decline in total spending by overnight visitors to Canada that reached \$678.3 million and a 8.0% drop in the average spend per trip to \$1,227;
- From January to September 2010, the increase in visitors from France (+6.8%) outpaced the increase in total overnight tourist spending (+3.1%) contributing to a moderate 1.7% decline in the average spend per trip to \$1,325;
- In the first three quarters of 2010, German overnight visitors reported the highest average spend per trip (\$1,520) among European visitors, despite a 4.0% decline over the same period in the previous year.

## Asia

(refer to Table 5)

- In the first quarters of 2010, Australia posted a 9.6% increase in the average duration of a trip to Canada, reaching 13 nights. This contributed to a 5.0% decline in the average spend per night and a 4.2% decline in the average spend per trip;
- China maintained strong growth in its overall overnight tourism spending in Canada, up 24.0% over the previous year. The average spend per trip and per night also rose 5.3% and 3.6% respectively.

## Emerging

(refer to Table 5)

- From January to September, Brazil posted the strongest increases in total overnight spend (+47.2%) among CTC key markets. Brazilian visitors boasted the third highest average spend per night among CTC overseas markets, with a 14.8% year-on-year increase;
- Total spending by Indian visitors to Canada increased by 23.0%, reaching 121.6 million during the first three quarters of 2010, with the average spend per night increasing 5.0% to \$47.

Table 6 Travel Characteristics of overseas province visits

	Province Visits	10/09 %Q1-Q3	Spending \$M	10/09 %Q1-Q3	Average Trip Duration (nights)	10/09 %Q1-Q3	Spend per Visit	10/09 %Q1-Q3	Spend per Night	10/09 %Q1-Q3
Newfoundland	30,500	10.5%	40.7	39.4%	17.0	59.0%	1,334	26.1%	78	-20.7%
Prince Edward Island	32,800	37.8%	22.4	43.7%	7.1	16.4%	683	4.3%	96	-10.4%
Nova Scotia	130,700	1.9%	160.5	15.6%	15.6	25.8%	1,228	13.5%	79	-9.8%
New Brunswick	57,900	32.8%	47.0	75.1%	10.1	-7.5%	812	31.8%	80	42.6%
Quebec	862,600	6.9%	914.1	3.9%	12.3	-1.1%	1,060	-2.8%	86	-1.7%
Ontario	1,450,700	2.6%	1,346.5	6.6%	12.3	0.9%	928	3.9%	76	3.0%
Manitoba	47,300	-27.3%	34.6	-16.6%	19.1	39.6%	731	14.7%	38	-17.8%
Saskatchewan	51,200	0.8%	39.2	-0.4%	17.2	44.0%	765	-1.2%	44	-31.4%
Alberta	618,700	-1.0%	604.6	-6.1%	10.6	-8.4%	977	-5.1%	92	3.6%
British Columbia	1,198,600	11.6%	1,423.3	4.7%	13.9	-7.3%	1,187	-6.2%	85	1.2%
Yukon	37,500	-1.8%	27.2	-29.5%	8.8	34.4%	724	-28.2%	82	-46.6%
Northwest Territories	9,800	19.5%	15.4	86.2%	8.2	58.6%	1,569	55.8%	192	-1.8%
<b>Total</b>	<b>4,528,200</b>	<b>5.2%</b>	<b>4,675.4</b>	<b>4.3%</b>	<b>12.7</b>	<b>-0.9%</b>	<b>1,033</b>	<b>-0.9%</b>	<b>82</b>	<b>0.0%</b>

Source: Statistics Canada, International Travel Survey, preliminary estimates

- In the first nine months of 2010, total spending by overseas visitors by province (excluding the US) improved moderately by 4.3% to \$4.7 billion. The average spend per night remained unchanged compared to the previous year at \$82. During this period, New Brunswick (+42.6%), posted the greatest increase in the average spend per night, while Yukon saw the greatest decline (-46.6%);
- British Columbia kept its lead in total spending by overseas province visitors with a 4.7% increase over the first three quarters of 2009. However, Ontario also posted strong overall growth in overseas spending: it had a 6.6% boost over the same period. Last year, both provinces saw gains in the average spend per night with Ontario up 3.0% and British Columbia up 1.2% as they reached \$76 and \$85 respectively;
- From CTC key overseas markets, Prince Edward Island reported the shortest average trip duration (seven nights) of overseas visitors, despite seeing a 16.4% increase over the first three quarters of 2010. Influenced by a 43.7% increase in total overnight spending by overseas visitors, the average spend per visit also grew by 4.3% to \$683 in PEI.