

Arrivals

Canadian travelers took 954,900 person-trips¹ to the Capital Region USA in 2010. This was almost a 1% increase compared to 2009. The number of person-trips to each area is shown on Table 1.

Table 1: Canadian Visitation - 2009 and 2010

	2009	2010	% change
Virginia	552,900	572,600	3.56
Maryland	236,200	212,300	-10.12
Washington, DC	158,800	170,000	7.05
CAPITAL REGION USA	947,900	954,900	0.74

Visitation to the Capital Region USA in 2010 represented 4.8 % of the total 19,964,200 person-trips that Canadians took to the U.S. during the same time period. This regional share of total U.S. visits provides a gauge of the region's relative position in the U.S. but is not a true share of the U.S. because of cross-visitation among Capital Region USA members. The total U.S. visitation estimate of 19,964,200, which does not include cross-visitation, represents an increase of 11.1% from 2009 which included a total of 17,976,700 person-trips.

The average number of nights Canadians spent in the region varied by area. The average for Washington, DC was 4.1 nights, compared to 3.4 nights in VA, and 4.4 nights Maryland. The average for the Capital Region USA, not accounting for cross-visitation, was 3.96 nights while the national average for the U.S. was 8.1 nights. Historically, the U.S. average has been highly influenced by four states, Florida, California, Arizona, and Hawaii, where large numbers of Canadians stay for periods that average two to three weeks. The averages for these states include the influence of "snowbirds" that may stay for several months during the winter.

¹ A person-trip is defined as any time a Canadian traveler visits Virginia, Maryland, or Washington, DC. A person that visits both Maryland and Virginia on a single trip would count as two person-trips.

Demographics

The majority of Canadian travelers – in the Capital Region USA, were between the ages of 45 to 74 years-old: 24% were 55 to 64 years-old; 17% were 45 to 54 years old; and 17% were 65 to 74 years-old. Only 11% were between the ages of 35 to 44; and the remaining groups varied by all ages. The age distribution of Canadian visitors to the Capital Region USA is an indication to the composition of the traveling party. Most Canadians – 60% - traveled in groups of two or three adults to the region. Seventeen percent of Canadians traveled alone and 15% with children.

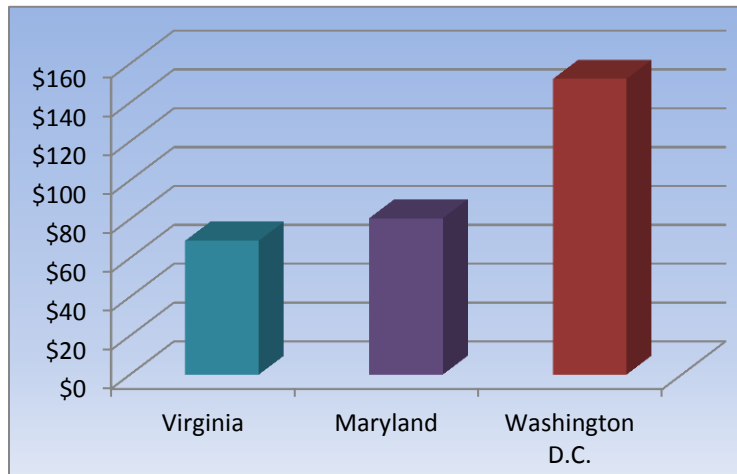
Canadian provinces of Ontario and Quebec were the origins for approximately 83% of the visitors to the Capital Region USA. Ontario represented 50% and Quebec provided 33% of the 2010 visitations. Compared to 2009, visits to the Capital Region USA decreased 9% from Ontario and increased 5% from Quebec in 2010. Additionally, visits from Ontario and Quebec to Virginia were 89%; Maryland, 85%; Washington, DC, 72%. Canada's other provinces – Newfoundland, Prince Edward Island, Nova Scotia, New Brunswick, Manitoba, Saskatchewan, Alberta, British Columbia - represent the remaining locations of visitors to the region. For perspective, 61% of U.S. visitation was from Ontario and Quebec in 2010.

Spending

Total Canadian visitor spending in the Capital Region USA was \$314.8 million in 2010. The estimated spending by Canadian travelers in Virginia was \$133 million compared to \$107.1 million in Washington, DC and \$74.7 million in Maryland. Virginia received the highest amount of spending by the Canadian visitors to the Capital Region USA because it had the highest number of visitors. The 2010 regional total spending represented 2.2% of the \$14.3 billion Canadian travelers spent in the U.S. in 2010. The U.S. total spending was up 16.3% while the regional total spending stayed constant.

The average per-person, per-day spending – which takes into account total spending, party size, and length of stay – varies by area: Virginia, \$69; Maryland, \$81; Washington, DC, \$152 (Chart 1). The 2010 data also reported that a Canadian visitor spent an average of \$101² per day.

Chart 1: Average per-person, per-day Spending in 2010



Trip Purpose

Traveling for holiday/vacation was the primary trip purpose for 53% of the Canadians traveling to the Capital Region USA in 2010 – an 8% decline compared to 2009. The purpose of travel varied across the region. Holiday/vacation represents 66% of total visits to Virginia, compared to 52% to Maryland, and 41% to Washington, DC. Business travel - meetings, conventions, conferences, trade shows, and other work - represented 19% of visits to the region with an almost 5% increase in 2010 compared to 2009. Business travel also varied by state: 9% to Virginia, 16% to Maryland, and 32% to Washington, DC. Visits to friends or relatives represented 16% of the regional person-visits. Thirteen percent of all person-visits were for other purposes – visiting secondary homes, attending events/attractions, educational studies, and other.

² Averages were determined by dividing the average spending by average trip days and average travel party size for each region.

Popularity of Trip Activities

Table 2 shows the relative popularity of numerous types of activities in which Canadian visitors to the U.S. participated during their trip. Shopping, sightseeing, visiting friends or relatives, and participating in sports/outdoor activities were the most popular activities. The popularity of activities was consistent with 2009 and earlier.

Table 2: Percentage of Canadian Travelers by Activity on U.S. Trip in 2010

<i>Type of Activity</i>	<i>Percentage</i>
<i>GO SHOPPING</i>	74.62%
<i>GO SIGHTSEEING</i>	43.98%
<i>VISIT FRIENDS OR RELATIVES</i>	35.17%
<i>PARTICIPATE IN SPORTS/OUTDOOR ACTIVITIES</i>	29.39%
<i>GO TO A BAR OR NIGHT CLUB</i>	22.54%
<i>VISIT A HISTORIC SITE</i>	21.48%
<i>VISIT A NATIONAL OR STATE NATURE PARK</i>	18.44%
<i>VISIT A MUSEUM OR ART GALLERY</i>	16.40%
<i>GO TO A CASINO</i>	14.82%
<i>ATTEND CULTURAL EVENTS (PLAYS, CONCERTS)</i>	12.72%
<i>VISIT A ZOO, AQUARIUM / BOTANICAL GARDEN</i>	10.86%
<i>GOLFING</i>	9.27%
<i>ATTEND A SPORTS EVENT</i>	8.74%
<i>ATTEND A FESTIVAL OR FAIR</i>	7.40%
<i>BOATING-MOTOR/SAIL BOAT/KAYAK/CANOE/OTHER</i>	5.63%
<i>FISHING</i>	1.83%
<i>DOWNHILL SKIING OR SNOW BOARDING</i>	1.33%
<i>HUNTING</i>	0.13%
<i>GO SHOPPING</i>	74.62%
<i>NO ACTIVITY STATED</i>	6.70%

Mode of Transportation

Canadian visitors traveled predominantly by automobile (62%) to the Capital Region USA; and 33% by airplane, 2% by bus, and 3% by rail, boat and other modes. Arrivals to the region by airplane increased 10% from 2009 to 2010, while travel by automobile decreased 11% due to increasing retail prices for all grades of gasoline in 2010. Sixty percent of the travelers to Washington, DC arrived by airplane with only 36% arriving by automobile in both 2009 and 2010. On the contrary, the mode of transportation is considerably different in Virginia and Maryland compared to Washington, DC. Travelers to Virginia and Maryland arrived mostly by automobile, 79% and 70% respectively; air travel was 16% for Virginia and 24% for Maryland. Other modes of transportation represented small percentages.

Accommodations

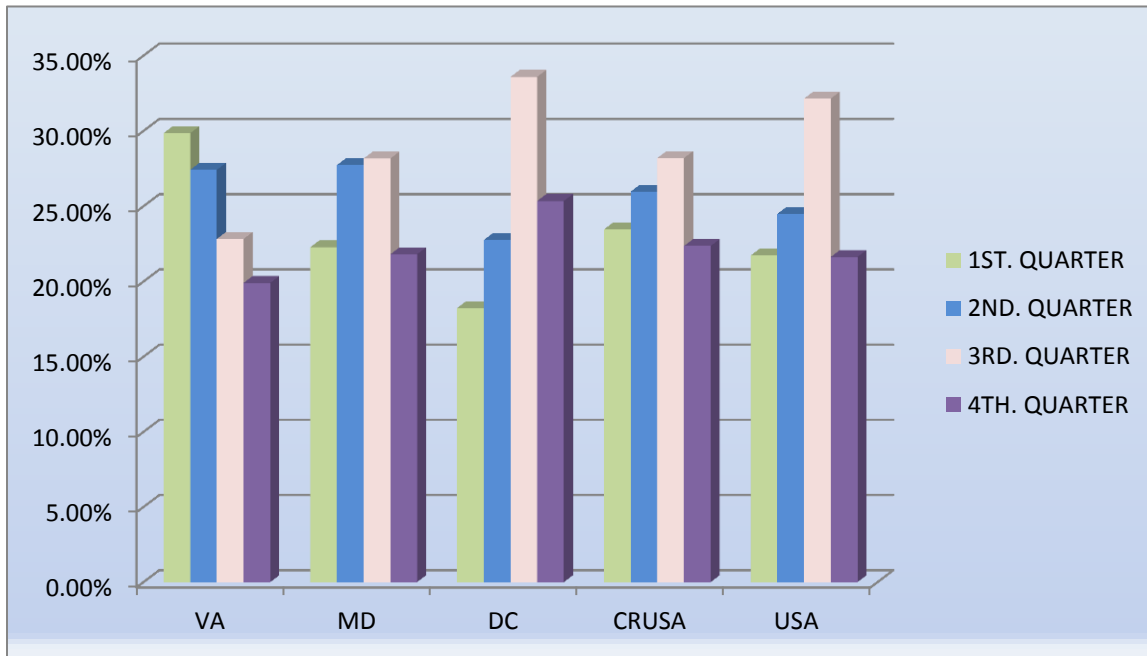
Canadian travelers (54%) mostly stayed at lodging accommodations at the Capital Region USA in 2010. Thirty-eight percent of Canadian visitors to Virginia and 19% of Canadian visitors to Maryland reported no accommodations. This could be attributed to multiple-nights spent in the Capital Region USA and/or other states. There is also a correlation between lodging accommodations and arrivals by plane. Likewise Washington, DC benefits from higher number of arrivals by plane and lodging accommodations compared to Virginia and Maryland. The percentages of lodging accommodation by each state are 73% in Washington, DC; 49 % in Maryland; 41% in Virginia. Staying with friends and/or relatives represented % 11 and camping represented 5% of the total person-visits in the Capital Region USA. Other types of lodging represented a small share of visits.

Season of Travel

Chart 2 displays the visitation patterns by quarters to Virginia; Maryland; Washington, DC; Capital Region USA, and U.S in 2010. The first quarter was the most visited for the U.S. while the remaining quarters received similar overall visitation. These quarterly patterns were consistent for the Capital Region USA in 2009 and 2010; however, the historical data (1999-2008) showed patterns of travel highest to lowest as first, second, third and fourth

quarters. There were also variations among Washington, D.C.; Maryland; and Virginia in 2010. Washington D.C. showed highest visitation in the third quarter; Virginia had the highest visitations in first and second quarters; and Maryland's visitations were the highest in the second and third quarters.

Chart 2: Quarterly-Travel Pattern to VA, MD, DC, Capital Region USA and U.S. in 2010



For more information

Please contact Vice President of Sales & Promotions, Diane Béchamps at (804) 545-5542 for further information about this report and how to access the international marketing opportunities.