

Tourism Snapshot

A Monthly Monitor of the Performance of Canada's Tourism Industry

April 2019
Volume 15, Issue 4

KEY HIGHLIGHTS

IMPORTANT NOTE REGARDING THE FRONTIER COUNTS DATA:

Land port data: There have been significant changes in how country of residence data is collected and established for non-US visitors entering Canada by land ports, starting in August 2018. As a result of these changes, monthly arrival levels by land are not comparable to data collected before August 2018. Year-over-year arrival performance results should only be evaluated for non-land arrival modes of transportation for non-US arrivals. This does not apply to US Auto arrivals.

Air arrivals data: Destination Canada advises caution in interpreting air arrival data with previous years as air arrivals include same-day and international passengers connecting through Canada between other international origins and destinations. Connecting traffic may have been subjected to material fluctuations in recent months.




Starting with January 2019 data, Statistics Canada updated the method of determining trip durations for US residents travelling to Canada and Canadian residents returning from the United States for non-automobile modes of transportation. This change affects the relative proportions of same-day/overnight travellers. Caution is therefore advised when comparing 2019 data with earlier time periods for these modes of transportation.

- As expected, the Easter holiday rebound in April 2019 (1.4 million visitors, +19.1%) offset contractions sustained in March 2019 and helped to lift international overnight arrivals to Canada to a new peak in April 2019 and over the first four months of 2019 (4.4 million, +4.4%).
- When combining March and April 2019 to provide a more accurate reflection of arrival trends from key markets over the Easter holiday period, arrivals increased by +6.3% from the UK, +6.5% from the US, and +31.4% from Mexico.
- In April 2019, Canada saw new monthly arrivals peaks from Mexico (46,000, +102.3%), China (40,000, +1.4%), France (40,000, +12.8%), and India (27,000, +26.6%). The same markets also set new arrivals records for the first four months of the year, as did Australia (71,000, +5.0% YTD).
- Year-to-date April 2019, air arrivals from US residents (+11.2%) surpassed the peak achieved in 2018. Air arrivals from the rest of the world also edged up (1.1%), as air arrivals direct from overseas (+3.3%) offset contractions in air arrivals via the United States (-7.6%).
- With the Japanese Golden Week holiday period starting in late April, non-land (mostly air) arrivals from Japan jumped 31.0% in April 2019, which represented the first increase in air arrivals from Japan since May 2017.
- In April 2019, tourist arrivals from the United States increased by automobile (+18.7%) and by air (+28.4%) bringing auto and air arrivals over the first four months of 2019 up +3.7% and +11.2%, respectively.
- Similar to April 2018, non-land (mostly air) arrivals from China contracted in April 2019 (-6.9%), including air arrivals direct from overseas (-5.4%) and air arrivals via the US (-19.3%). Total arrivals in April 2019 (+1.4%) and over the first four months of 2019 (+0.7%) were still ahead of 2018 levels, thus reaching a new record peak. China remains the largest long-haul DC market year-to-date in 2019.

¹Note the caveat from Statistics Canada associated with the April 2019 data, available here: <https://www150.statcan.gc.ca/n1/daily-quotidien/190620/dq190620c-eng.htm>

QUICK LINKS

Industry Performance Dashboard

	April 2019	YTD
 Overnight Arrivals¹		
Total International	↑ 19.1%	↑ 4.4%
10 DC Markets*	↑ 18.1%	↑ 4.2%
<i>United States</i>	↑ 16.4%	↑ 3.9%
<i>9 Long-Haul Markets</i>	↑ 23.9%	↑ 4.9%
Non-DC Markets	↑ 25.6%	↑ 6.0%
 Air Seat Capacity²		
Total International	↑ 4.0%	↑ 5.5%
10 DC Markets*	↑ 2.7%	↑ 4.2%
Non-DC Markets	↑ 6.9%	↑ 7.8%
 National Hotel Indicators³		
Occupancy Rate**	↓ -0.2	↓ -0.4
Revenue Per Available Room (Revpar)	↑ 3.2%	↑ 1.7%
Average Daily Rate (ADR)	↑ 2.8%	↑ 0.9%

Notes:

The Industry Performance Dashboard figures are year-on-year variations.

* The 10 DC markets are US, France, Germany, UK, Australia, China, India, Japan, South Korea and Mexico.

** Percentage point variations.

Sources:

1. Statistics Canada, Frontier counts, custom tabulations

2. IATA-Diio SRS Analyser

3. CBRE Hotels with reproduction and use of information subject to CBRE Disclaimer / Terms of Use as detailed at www.cbre.ca.

MARKET MONITOR SUMMARY

	Market	Overnight Arrivals ⁱ		Arrival YOY Variations (%)		Air Seat capacity ⁱⁱ		Local currency vs. CAD ⁱⁱⁱ	
		Apr. 2019	YTD 2019	Apr. 2019	YTD 2019	Apr. 2019	YTD 2019	Apr. 2019 Average	YTD Average
DC North America	United States	900,449	2,923,931	16.4%	3.9%	3.6%	5.4%	5.1%	5.1%
	Mexico	46,092	125,250	102.3%	30.2%	-5.0%	0.6%	1.8%	2.3%
DC Europe	France	39,639	130,443	12.8%	8.2%	4.3%	4.4%	-3.8%	-3.2%
	Germany	20,393	60,672	7.2%	-7.6%	4.3%	4.3%	-3.8%	-3.2%
	United Kingdom	56,301	153,074	37.9%	1.5%	-8.6%	-6.0%	-2.7%	-1.9%
DC Asia-Pacific	Australia	17,809	71,370	10.9%	5.0%	22.6%	15.4%	-2.8%	-4.3%
	China	40,424	171,051	1.4%	0.7%	3.0%	2.1%	-1.5%	-1.1%
	India	27,257	70,284	26.6%	17.6%	-22.7%	-0.1%	-0.6%	-3.1%
	Japan	17,116	60,170	33.7%	-0.4%	18.6%	9.5%	1.3%	2.7%
	South Korea	11,780	44,559	-23.9%	-17.9%	4.2%	-4.4%	-1.8%	-0.3%
Total 10 DC Markets		1,177,260	3,810,804	18.1%	4.2%				
Rest of the World		185,702	572,776	25.6%	6.0%				
Total International		1,362,962	4,383,580	19.1%	4.4%				

Sources:

- i. Statistics Canada, Frontier counts, custom tabulations
- ii. IATA-Diio SRS Analyser
- iii. Bank of Canada

Notes:

- i. Arrival figures are preliminary estimates and are subject to change.
- ii. Air seat capacity is the variation in the total number of seats on direct commercial scheduled flights during the current month and YTD relative to the same periods in the previous year.
- iii. The exchange rate variation is calculated on the average value of the Canadian Dollar during the current month and YTD relative to the same periods in the previous year.

UNITED STATES

US Arrivals to Canada

CURRENT MONTH:

+16.4% ↑ YOY



YTD:

+3.9% ↑ YOY

Overnight Arrivals

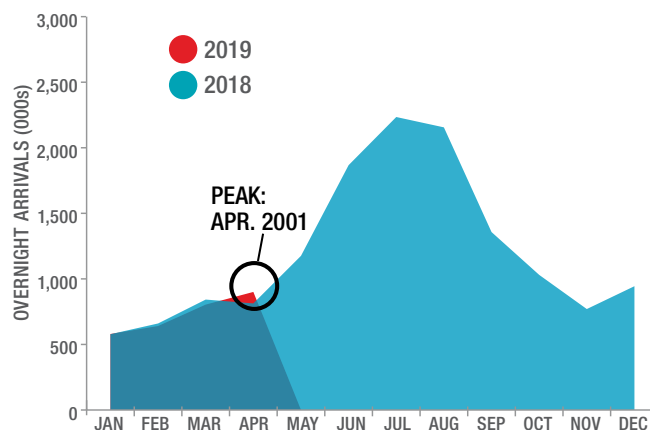
	April 2019		YTD 2019	
	Arrivals	% YOY Variance	Arrivals	% YOY Variance
🚗 Automobile	502,052	18.7	1,598,767	3.7
✈️ Air	363,893	28.4	1,212,956	11.2
☎️ Other	34,504	-48.6	112,208	-38.0
US Total	900,449	16.4	2,923,931	3.9

Source: Statistics Canada, Frontier counts, custom tabulations.

Note: The figures are preliminary estimates and are subject to change.



Trend Plot: Total United States Arrivals



United States: Key Indicators

Air Seat Capacity ⁱ	April 2019	3.6%
	YTD	5.4%
Exchange Rate ⁱⁱ	April 2019	5.1%
	YTD	5.1%
Consumer Confidence Index (1985=100) ⁱⁱⁱ	April 2019	129.2
	Previous Month	124.2
YTD Arrival Peak ^{iv}	Peak Year	2002
	Current % of Previous Peak	92.0%

Source:

i. IATA-Diio SRS Analyser, Year-on-year % variance.

ii. Bank of Canada, Year on year % variance.

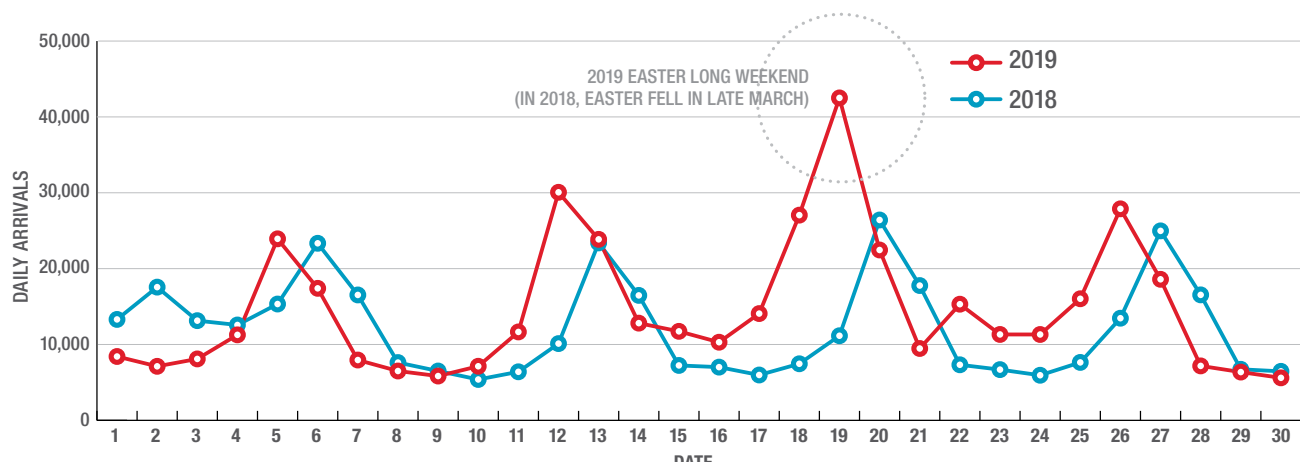
iii. Consumer Confidence Index, the Conference Board (USA).

iv. Statistics Canada, Frontier counts, custom tabulations.

UNITED STATES

- Canada welcomed 900,000 visitors from the US in April 2019, up 16.4% compared to April 2018. This sudden jump, offsetting the drop in March 2019, brought total US arrivals over the first four months of 2019 (2.92 million, +3.9%) back up ahead of 2018 levels.
- As noted in March, this spike in April arrivals was expected due to the shift in the dates of the Easter long weekend, from late March in 2018 to late April in 2019. This trend is clear in the daily auto arrivals data (IPIL), which shows a large spike over the Easter weekend in March in 2018 and in April in 2019.
- The strong performance in April was attributable to a fourth consecutive month of increased US air arrivals (+28.4%), as well as strong US auto arrivals (+18.7%). This outpaced the ongoing decline in US arrivals via other modes of transport such as bus, train, and cruise (-48.6%). A similar trend was seen over the first four months of 2019, with increased air arrivals (+11.2%) and auto arrivals (+3.7%), but decreased arrivals by other modes (-38.0%).
- It is also important to note that Statistics Canada advises caution when comparing 2019 data with earlier time periods for US arrivals via non-automobile modes of transportation due to methodology changes beginning in January 2019.
- Both in April and year-to-date 2019, the largest proportions of US overnight auto arrivals (based on IPIL arrival estimates) came from New York, Washington, and Michigan. The particularly notable drop in auto arrivals from New York in March was offset by a big jump in April (+29.9%).
- The continued growth in US air arrivals over the past few months was supported by the ongoing expansion of air capacity between Canada and the US (+3.6% in April 2019, +5.4% YTD). With fewer Canadians flying to the US, this suggests that more Americans are filling those extra seats.
- The purchasing power of the USD in Canada was also in a strong position, (+5.1% in April, +5.1% YTD).
- The consumer confidence index published by the US Conference Board recovered from the drop in March, jumping 5.0 points in April 2019.

Daily US Overnight Auto Arrivals – April 2019



Note: Daily US resident overnight auto arrivals at land ports with Integrated Primary Inspection Lane (IPIL).

MEXICO

Mexico Arrivals to Canada

CURRENT MONTH:

+102.3% ↑ YOY



YTD:

+30.2% ↑ YOY

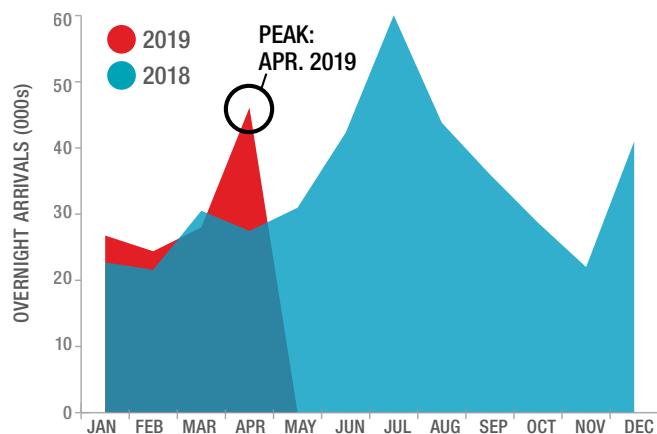
Overnight Arrivals

	April 2019		YTD 2019	
	Arrivals	% YOY Variance	Arrivals	% YOY Variance
Mexico	46,092	102.3	125,250	30.2

Source: Statistics Canada, Frontier counts, custom tabulations.
Note: The figures are preliminary estimates and are subject to change.



Arrival Trend Plot – Total Mexico



Mexico: Key Indicators

		Mexico
Air Seat Capacity ⁱ	April 2019	-5.0%
	YTD	0.6%
Exchange Rate ⁱⁱ	April 2019	1.8%
	YTD	2.3%
YTD Arrival Peak ⁱⁱⁱ	Peak Year	2018
	Current % of Previous Peak	130.2%

Sources:

i. IATA-Diio SRS Analyser, Year-on-year % variance.

ii. Bank of Canada, Year on year % variance.

iii. Statistics Canada, Frontier counts, custom tabulations.

- Following a sudden drop in March 2019 due to the Easter effect, where travel over the Easter holiday weekend shifted from late March in 2018 to late April in 2019, arrivals from Mexico rebounded in April 2019 with a record 46,000 visitors (+102.3%). Non-land arrivals (primarily via air) accounted for about 39,000 of those visitors and were up +77.3% year-over-year. With this performance, Mexico was Destination Canada's second largest long-haul market in April 2019 (after the UK).
- From January to April 2019, arrivals from Mexico reached a new record peak (125,000, +30.2%), surpassing the 100K mark earlier in the year than ever before and continuing the long-term positive trend observed since the replacement of the visa requirement for Mexican citizens with the eTA in December 2016. About 110,000 of those were non-land arrivals, up +20.5% year-over-year. Year-to-date, Mexico is currently Destination Canada's fourth largest overseas market, after China, the UK, and France.
- The strength of the Mexican Peso in Canada remained ahead of the same period last year (+1.8% in April, +2.3% YTD).
- Following a long period of expansion, air capacity between Mexico City and Canada retracted for a second consecutive month in April 2019 (-5.0%), but remained slightly ahead of 2018 levels year-to-date (+0.6%).

Mexico Arrivals by Port of Entry

- Between January and April 2019, the majority of visitors from Mexico flew to Canada direct from overseas (70.9%), while another 16.5% flew to Canada via the US.
- Over the first four months of 2019, the main ports of entry for direct air arrivals from Mexico were YYZ (40.2% of direct air arrivals), YVR (36.3%) and YUL (18.7%), with an additional 1.7% flying into YYC and 3.1% flying into other Canadian airports. Of the four major hubs, only YYC saw a year-over-year decrease in arrivals from Mexico over this period (-49.3%). The greatest year-over-year increase was registered outside of the four major hubs (+169.2% at other Canadian airports).

Year-to-date Arrivals by Port of Entry

			Mexico
Air Arrivals from Overseas	YYZ	Arrivals	35,704
		YOY%	13.7%
		% of Total	28.5%
	YVR	Arrivals	32,220
		YOY%	20.4%
		% of Total	25.7%
	YUL	Arrivals	16,592
		YOY%	21.6%
		% of Total	13.2%
	YYC	Arrivals	1,505
		YOY%	-49.3%
		% of Total	1.2%
	All other airports	Arrivals	2,773
		YOY%	169.2%
		% of Total	2.2%
	Subtotal	Arrivals	88,794
		YOY%	17.1%
		% of Total	70.9%
Air Arrivals via the US	All airports	Arrivals	20,713
		YOY%	37.9%
		% of Total	16.5%
Sea Arrivals	All sea borders	Arrivals	135
		YOY%	-8.2%
		% of Total	0.1%
Land Arrivals via US	All land borders	Arrivals	15,608
		YOY%	196.8%
		% of Total	12.5%
Total Overnight Arrivals			125,250

Source: Statistics Canada, Frontier counts, custom tabulations, Table C.
Note: The figures are preliminary estimates and are subject to change.

EUROPE

Europe Arrivals to Canada

CURRENT MONTH:

+22.5% ↑ YOY



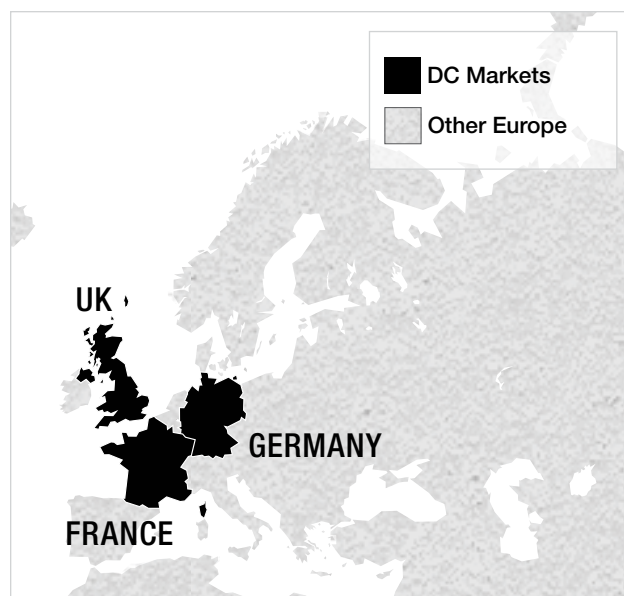
YTD:

+2.1% ↑ YOY

Overnight Arrivals

	April 2019		YTD 2019	
	Arrivals	% YOY Variance	Arrivals	% YOY Variance
DC Europe	116,333	22.5	344,189	2.1
United Kingdom	56,301	37.9	153,074	1.5
France	39,639	12.8	130,443	8.2
Germany	20,393	7.2	60,672	-7.6
Other Europe	69,103	18.7	207,853	1.2
Italy	7,737	35.5	20,526	7.8
Netherlands	7,974	-2.1	22,373	-1.9
Spain	5,514	46.4	14,554	4.0
Switzerland	7,405	10.1	23,598	9.0
Rest of Europe	40,473	19.6	126,802	-0.8
Total Europe	185,436	21.1	552,042	1.8

Source: Statistics Canada, Frontier counts, custom tabulations.
Note: The figures are preliminary estimates and are subject to change.

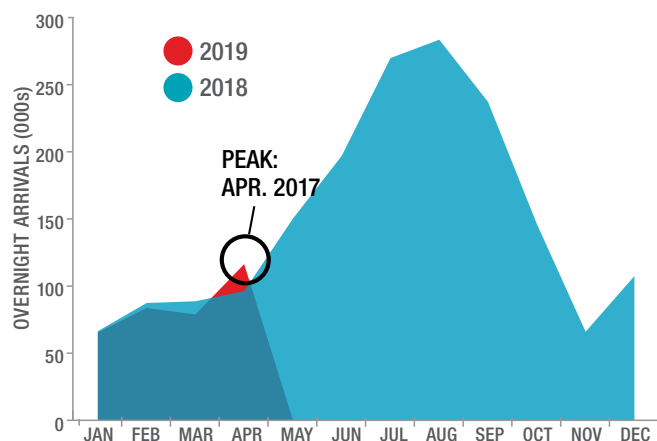


DC Europe: Key Indicators

		France	Germany	United Kingdom
Air Seat Capacityⁱ	Apr. 2019	4.3%	4.3%	-8.6%
	YTD	4.4%	4.3%	-6.0%
Exchange Rateⁱⁱ	Apr. 2019	-3.8%	-3.8%	-2.7%
	YTD	-3.2%	-3.2%	-1.9%
YTD Arrival Peakⁱⁱⁱ	Peak Year	2018	2017	2001
	Current % of Previous Peak	108.2%	88.2%	78.8%

Sources:
i. IATA-Diio SRS Analyser, Year-on-year % variance.
ii. Bank of Canada, Year on year % variance.
iii. Statistics Canada, Frontier counts, custom tabulations.

Trend Plot: Total DC Europe Arrivals



- In April 2019, arrivals from Destination Canada's Europe region rebounded from the March decline, (116,000, +22.5%). This brought year-to-date arrivals over the first four months of 2019 to 344,000, up 2.1% compared to the same period last year.
- This April rebound was led by the UK, which offset an Easter-related March decline with a jump of +37.9% in April 2019. The same trend may have impacted arrivals from Germany, which increased in April (+7.2%) for the first time since September 2018. Non-land (primarily air) arrivals from both markets were also ahead of April 2018.
- With this performance, the UK firmly held its spot as Destination Canada's largest long-haul market in April 2019. However, it remained second to China in year-to-date arrivals from January to April 2019.
- Arrivals from France continued to follow the recent positive trend and set a new monthly record in April 2019 (40,000, +12.8%). This includes about 36,000 non-land (mostly air) arrivals, +7.7%. This performance brought year-to-date arrivals from France from January to April up to a new record of 130,000 (+8.2%).
- Direct air seat capacity to Canada expanded over this period from France (+4.3% in April, +4.4% YTD) and Germany (+4.3% in April, +4.3% YTD), but there were fewer seats available from the UK (-8.6% in April, -6.0% YTD).
- Meanwhile, the purchasing power of both the Euro (-3.8% in April, -3.2% YTD) and British pound (-2.7% in April, -1.9% YTD) relative to the Canadian dollar fell below the same period in 2018.

DC Europe Arrivals by Port of Entry

- From January to April 2019, arrivals by air direct from overseas accounted for just over three quarters (76.2%) of arrivals from Destination Canada's Europe region. Visitors from France continued to fly to Canada primarily via YUL (80.4% of direct air arrivals), while those from the United Kingdom and Germany most often flew via YYZ (46.7% and 45.3%, respectively) or YVR (26.4% and 21.7%).

Year-to-date Arrivals by Port of Entry

			France	Germany	UK
Air Arrivals from Overseas	YYZ	Arrivals	11,701	20,602	53,077
		YOY%	-21.0%	-14.0%	-5.3%
		% of Total	9.0%	34.0%	34.7%
	YVR	Arrivals	4,062	9,876	29,973
		YOY%	24.7%	4.3%	-4.4%
		% of Total	3.1%	16.3%	19.6%
	YUL	Arrivals	83,070	9,050	11,755
		YOY%	31.9%	6.6%	-4.1%
		% of Total	63.7%	14.9%	7.7%
	YYC	Arrivals	728	4,938	14,585
		YOY%	-10.6%	-3.8%	-14.3%
		% of Total	0.6%	8.1%	9.5%
	All other airports	Arrivals	3,802	1,015	4,147
		YOY%	40.9%	-21.8%	-14.0%
		% of Total	2.9%	1.7%	2.7%
	Subtotal	Arrivals	103,363	45,481	113,537
		YOY%	22.2%	-5.9%	-6.6%
		% of Total	79.2%	75.0%	74.2%
Air Arrivals via the US	All airports	Arrivals	17,130	9,851	19,904
		YOY%	-42.6%	-10.8%	-5.5%
		% of Total	13.1%	16.2%	13.0%
Sea Arrivals	All sea borders	Arrivals	25	141	483
		YOY%	-57.6%	-88.6%	-49.5%
		% of Total	0.0%	0.2%	0.3%
Land Arrivals via US	All land borders	Arrivals	9,925	5,199	19,150
		YOY%	65.0%	2.5%	164.2%
		% of Total	7.6%	8.6%	12.5%
Total Overnight Arrivals			130,443	60,672	153,074

Source: International Travel Survey, Table C, Statistics Canada.
Note: The figures are preliminary estimates and are subject to change.

ASIA-PACIFIC

DC Asia-Pacific Arrivals to Canada

CURRENT MONTH:

+8.2% ↑ YOY



YTD:

+1.3% ↑ YOY

Overnight Arrivals

	April 2019		YTD 2019	
	Arrivals	% YOY Variance	Arrivals	% YOY Variance
DC Asia-Pacific	114,386	8.2	417,434	1.3
Australia	17,809	10.9	71,370	5.0
China	40,424	1.4	171,051	0.7
India	27,257	26.6	70,284	17.6
Japan	17,116	33.7	60,170	-0.4
South Korea	11,780	-23.9	44,559	-17.9
Other Asia-Pacific	62,585	31.9	193,427	12.0
Hong Kong	11,872	61.0	38,511	11.0
Taiwan	6,407	-21.0	28,098	-7.6
Rest of Asia-Pacific	44,306	38.6	126,818	17.9
Total Asia-Pacific	176,971	15.5	610,861	4.4

Source: Statistics Canada, Frontier counts, custom tabulations.
Note: The figures are preliminary estimates and are subject to change.

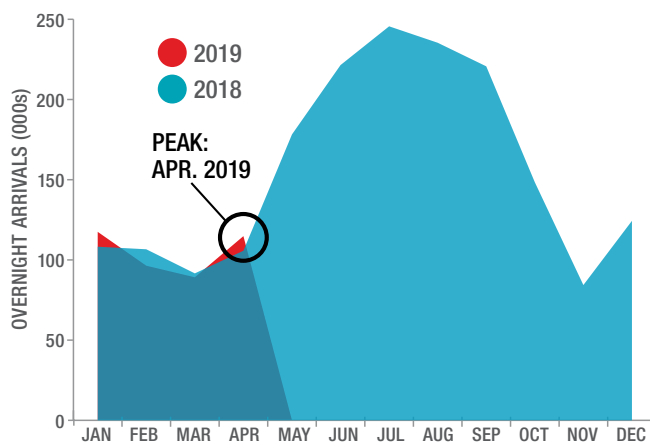


Asia-Pacific: Key Indicators

		Australia	China	India	Japan	South Korea
Air Seat Capacity ⁱ	Apr. 2019	22.6%	3.0%	-22.7%	18.6%	4.2%
	YTD	15.4%	2.1%	-0.1%	9.5%	-4.4%
Exchange Rate ⁱⁱ	Apr. 2019	-2.8%	-1.5%	-0.6%	1.3%	-1.8%
	YTD	-4.3%	-1.1%	-3.1%	2.7%	-0.3%
YTD Arrival Peak ⁱⁱⁱ	Peak Year	2017	2018	2018	1997	2017
	Current % of Previous Peak	100.6%	100.7%	117.6%	45.8%	74.8%

Sources:
i. IATA-Diio SRS Analyser, Year-on-year % variance.
ii. Bank of Canada, Year on year % variance.
iii. Statistics Canada, Frontier counts, custom tabulations.

Trend Plot: Total DC Asia-Pacific Arrivals



ASIA-PACIFIC

- Canada welcomed just over 114,000 visitors from Destination Canada's Asia-Pacific region in April 2019, up 8.2% over the same month a year ago. This brought year-to-date arrivals from this region ahead of 2018 levels for the first four months of the year to 417,000 overnight visitors (+1.3%).

- With the Japanese Golden Week holiday period starting in late April, total arrivals from Japan in April 2019 jumped to 17,000, up 33.7% over April 2018. In particular, non-land (mostly air) arrivals from Japan jumped 31.0%, which represented the first increase in air arrivals from Japan since May 2017.

- While total arrivals from China in April 2019 (+1.4%) were slightly ahead of April 2018 and reached a new peak, non-land (primarily air) arrivals from China contracted in April 2019 (-6.9%), including by air direct from overseas (-5.4%) and by air via the US (-19.3%). Similarly, total arrivals over the first four months of 2019 were just ahead of 2018 levels (+0.7%), but non-land arrivals fell behind (-3.8%). China remains the largest of Destination Canada's long-haul markets year-to-date in 2019, and as noted last month, air ticket data suggests that this slight downward trend in air arrivals may be associated with fewer Chinese travellers transiting through Canada on trips between the US and China.

- While total arrivals from South Korea (-23.9%) continued to show a downward trend in April 2019, resulting from a statistical revision on land port data, non-land (mostly air) arrivals were actually marginally ahead of April 2018 levels (+0.6%). The same was true for year-to-date arrivals (-17.9% total arrivals, +1.5% non-land arrivals).

- Arrivals from Australia were up year-over-year in April 2019 (18,000, +10.9%), and just behind the record peak set in 2017. This brought year-to-date arrivals up to a new record of 71,000 (+5.0%).

- Arrivals from India were also up in April 2019 (27,000, +26.6%) and year-to-date (70,000, +17.6%), hitting new record peaks for both periods.
- In April 2019, direct air capacity to Canada from four of Destination Canada's five Asia-Pacific markets expanded, led by Australia (+22.6%). The exception was a retraction in available seats between Canada and India (-22.7%).

DC Asia-Pacific Arrivals by Port of Entry

- From January to April 2019, the majority of visitors from Destination Canada's Asia-Pacific region flew to Canada direct from overseas (70.7%), primarily flying into YVR and YYZ.

Year-to-date Arrivals by Port of Entry

			Australia	China	India	Japan	South Korea
Air Arrivals from Overseas	YYZ	Arrivals	3,281	52,967	30,117	10,106	11,933
		YOY%	-4.0%	-2.1%	-0.6%	-28.0%	-6.3%
		% of Total	4.6%	31.0%	42.9%	16.8%	26.8%
	YVR	Arrivals	32,269	67,360	19,593	29,731	16,783
		YOY%	13.8%	-2.8%	37.7%	7.7%	4.7%
		% of Total	45.2%	39.4%	27.9%	49.4%	37.7%
	YUL	Arrivals	557	8,955	1,957	1,823	279
		YOY%	14.6%	-1.5%	-12.7%	924.2%	2.2%
		% of Total	0.8%	5.2%	2.8%	3.0%	0.6%
	YYC	Arrivals	465	2,287	2,431	846	137
		YOY%	19.5%	-7.4%	-3.8%	-57.7%	69.1%
		% of Total	0.7%	1.3%	3.5%	1.4%	0.3%
	All other airports	Arrivals	251	187	469	188	58
		YOY%	120.2%	-16.1%	2.0%	437.1%	7.4%
		% of Total	0.4%	0.1%	0.7%	0.3%	0.1%
	Subtotal	Arrivals	36,823	131,756	54,567	42,694	29,190
		YOY%	12.4%	-2.5%	9.6%	-2.7%	0.1%
		% of Total	51.6%	77.0%	77.6%	71.0%	65.5%
Air Arrivals via the US	All airports	Arrivals	26,999	16,348	6,786	10,780	7,127
		YOY%	-5.5%	-13.5%	10.0%	-6.5%	5.9%
		% of Total	37.8%	9.6%	9.7%	17.9%	16.0%
Sea Arrivals	All sea borders	Arrivals	266	191	279	6	111
		YOY%	-32.0%	105.4%	184.7%	-90.3%	1,485.7%
		% of Total	0.4%	0.1%	0.4%	0.0%	0.2%
Land Arrivals via US	All land borders	Arrivals	7,282	22,756	8,652	6,690	8,131
		YOY%	16.7%	45.3%	132.8%	35.3%	-55.7%
		% of Total	10.2%	13.3%	12.3%	11.1%	18.2%
Total Overnight Arrivals			71,370	171,051	70,284	60,170	44,559

Source: International Travel Survey, Table C, Statistics Canada.
Note: The figures are preliminary estimates and are subject to change.

CANADIAN OUTBOUND TRAVEL

Overnight Trips by Canadians

	April 2019	YOY % Variance	Jan. - Apr. 2019	YOY^ % Variance
United States	1,862,239	-6.8	6,661,416	-5.8
Other Countries	1,107,573	-6.9	5,040,466	1.6
Total Trips from Canada	2,969,812	-6.9	11,701,882	-2.7

Source: Statistics Canada, International Travel Survey.

Note: The figures are preliminary estimates and are subject to change.

- Canadians took 2.97 million international trips in April 2019, down 6.9% compared to the same month a year ago. Trips to overseas international destinations (1.11 million trips, -6.9%) and trips to the US (1.86 million trips -6.8%) fell at a similar rate compared to April 2018.
- The decline in Canadians returning from the US in April 2019 was seen across all modes of transportation: by automobile (-3.6%), by air (-8.2%), and particularly by other modes of transportation, such as bus, train, or cruise (-30.1%).
- From January to April 2019, Canadians travelled internationally less than they did over the same period in 2018 (11.70 million trips, -2.7%). This decline was due primarily to a decrease in travel to the US (6.66 million trips, -5.8%), which outweighed a slight increase in Canadian travel to other international destinations (5.04 million trips, +1.6%).
- It is important to note that starting with January 2019 data, Statistics Canada updated the method of determining trip durations for US residents travelling to Canada and Canadian residents returning from the United States for non-automobile modes of transportation. This change affects the relative proportions of same-day/overnight travellers. Caution is therefore advised when comparing this 2019 data with earlier time periods.

INTERNATIONAL ARRIVALS BY PROVINCE OF ENTRY

Year-to-date Overnight Arrivals by Province of Entry

		Newfoundland and Labrador	Prince Edward Island	Nova Scotia	New Brunswick	Québec	Ontario
Total One or more nights	2019	5,194	17	14,757	26,336	727,037	2,005,518
	Variance YOY%	-26.3%	13.3%	-17.3%	3.9%	8.0%	3.1%
	Change YOY	-1,858	2	-3,077	993	54,140	60,500
US Residents by Automobile	2019	0	0	0	23,665	251,231	762,180
	Variance YOY%	0.0%	0.0%	0.0%	-1.0%	4.9%	4.5%
	Change YOY	-	-	-	-234	11,700	32,676
US Residents by Non-Automobile	2019	329	6	8,781	1,574	216,718	590,665
	Variance YOY%	-72.7%	50.0%	-10.0%	38.8%	10.2%	-2.1%
	Change YOY	-874	2	-975	440	20,069	-12,924
Residents from Other Countries	2019	4,865	11	5,976	1,097	259,088	652,673
	Variance YOY%	-16.8%	0.0%	-26.0%	253.9%	9.5%	6.7%
	Change YOY	-984	0	-2,102	787	22,371	40,748

Source: Statistics Canada, Frontier counts, custom tabulations.
Preliminary estimates subject to change.

Year-to-date Overnight Arrivals by Province of Entry

		Manitoba	Saskatchewan	Alberta	British Columbia	Yukon	Nunavut	CANADA
Total One or more nights	2019	52,299	14,421	212,774	1,316,004	9,036	187	4,383,580
	Variance YOY%	14.2%	14.4%	4.6%	4.4%	1.7%	30.8%	4.4%
	Change YOY	6,512	1,813	9,345	55,900	149	44	184,463
US Residents by Automobile	2019	30,537	10,082	18,395	494,681	7,996	0	1,598,767
	Variance YOY%	1.0%	20.7%	6.8%	2.2%	-4.6%	0.0%	3.7%
	Change YOY	290	1,732	1,176	10,416	-384	-	57,372
US Residents by Non-Automobile	2019	18,212	3,652	130,713	353,895	609	10	1,325,164
	Variance YOY%	32.0%	0.6%	8.7%	9.9%	317.1%	-54.5%	4.2%
	Change YOY	4,414	21	10,458	32,020	463	-12	53,102
Residents from Other Countries	2019	3,550	687	63,666	467,428	431	177	1,459,649
	Variance YOY%	103.8%	9.6%	-3.5%	3.0%	19.4%	46.3%	5.3%
	Change YOY	1,808	60	-2,289	13,464	70	56	73,989

- From January to April 2019, most international visitors to Canada crossed the border in Ontario (45.8%), British Columbia (30.0%), Quebec (16.6%) and Alberta (4.9%).
- The 4.4% increase in total international arrivals over this period was seen across most provinces and territories, with the exception of some contractions in Nova Scotia and Newfoundland, which resulted from Air Canada suspending service from the UK on the heel of Transport Canada's decision to close the Canadian airspace to Boeing 737 Max 8 jets earlier in March.
- The biggest increases were seen in Ontario (+3.1%, 61,000 additional arrivals), British Columbia (+4.4%, 56,000 additional arrivals), and Quebec (+8.0%, 54,000 additional arrivals). While British Columbia and Quebec saw increased US auto, US non-auto, and overseas arrivals, Ontario saw a decrease in US non-auto arrivals (-2.1%) from January to April 2019.

ACCOMMODATION

Hotel Performance Indicators by Province

	Occupancy Rates				Average Daily Rate (ADR)				Revenue Per Available Room (RevPAR)			
	Apr. 2019	YOY [^] Variance	Jan.- Apr.	YOY [^] Variance	Apr. 2019	YOY % Variance	Jan.- Apr.	YOY % Variance	Apr. 2019	YOY % Variance	Jan.- Apr.	YOY % Variance
Alberta ¹	53.0%	-2.1	50.8%	-0.2	\$126.94	-1.3%	\$126.16	-1.1%	\$67.27	-5.1%	\$64.03	-1.5%
British Columbia	68.6%	1.9	64.4%	0.8	\$169.81	6.8%	\$170.92	3.4%	\$116.54	9.8%	\$110.04	4.7%
Saskatchewan	57.1%	-1.7	52.2%	-0.7	\$119.01	-0.1%	\$117.33	-0.6%	\$67.91	-3.0%	\$61.29	-2.0%
Manitoba	63.2%	-2.3	63.2%	0.2	\$124.93	-1.1%	\$124.84	0.5%	\$78.94	-4.5%	\$78.93	0.9%
Ontario	67.0%	-0.6	60.8%	-1.1	\$158.62	3.5%	\$152.51	2.4%	\$106.29	2.7%	\$92.78	0.6%
Quebec	63.0%	2.9	59.1%	-0.5	\$158.18	5.0%	\$156.48	2.6%	\$99.62	10.0%	\$92.45	1.8%
New Brunswick	52.4%	-1.3	47.6%	-1.0	\$118.78	0.9%	\$118.19	1.4%	\$62.22	-1.6%	\$56.30	-0.7%
Nova Scotia	59.5%	-4.5	53.7%	-1.1	\$132.28	-6.1%	\$127.17	-2.5%	\$78.76	-12.6%	\$68.25	-4.5%
Newfoundland	49.2%	3.2	41.8%	0.4	\$120.06	-8.6%	\$121.01	-8.0%	\$59.10	-2.3%	\$50.55	-7.0%
Prince Edward Island	59.0%	11.3	44.6%	4.6	\$123.56	7.6%	\$117.24	4.3%	\$72.96	33.1%	\$52.30	16.4%
Northwest Territories	49.2%	-8.5	67.0%	-10.3	\$146.63	1.8%	\$148.96	-2.3%	\$72.12	-13.2%	\$99.82	-15.3%
Yukon	49.7%	0.0	52.8%	0.6	\$132.99	1.0%	\$130.02	3.9%	\$66.09	1.1%	\$68.64	5.1%
Canada	62.4%	-0.2	58.1%	-0.4	\$151.69	3.2%	\$149.27	1.7%	\$94.73	2.8%	\$86.72	0.9%

Note: Based on the operating results of 237,545 rooms (unweighted data).

[^] Percentage points.

¹ Excluding Alberta resorts.

Source: CBRE Hotels with reproduction and use of information subject to CBRE Disclaimer / Terms of Use as detailed at www.cbre.ca.

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- In April 2019 the national average occupancy rate was almost on par with the same month a year ago (62.4%, down 0.2 percentage points), bringing the year-to-date rate for the first four months of 2019 to 58.1%, a marginal -0.4 percentage points below the same period in 2018.
- In April 2019, the highest occupancy rates were recorded in British Columbia, Ontario, and Manitoba. Year-to-date, the highest occupancy rate was recorded in the Northwest Territories, followed by British Columbia and Manitoba.
- The national average daily rate (ADR) increased in April 2019 (\$151.69, +3.2%), bringing the ADR for the first four months of 2019 ahead of 2018 levels (\$149.27, +1.7%). Both in April and YTD 2019, the highest ADR was recorded in British Columbia, followed by Quebec and Ontario.
- The national revenue per available room (RevPar) also increased in April 2019 (\$94.73, +2.8%), bringing the YTD average just ahead of 2018 (\$86.72, +0.9%). The top performing provinces/territories included British Columbia, the Northwest Territories, Ontario, and Quebec.
- The Northwest Territories remained a strong performer across metrics, but also continued to record some steep declines compared to 2018. At the same time, Prince Edward Island recorded the strongest year-over-year growth across metrics, despite some lower rates.

ACCOMMODATION

Hotel Performance Indicators by Property Type

	Occupancy Rates				Average Daily Rate (ADR)			
	Apr. 2019	YOY^ Change	Jan.- Apr.	YOY^ Variance	Apr. 2019	YOY Variance	Jan.- Apr.	YOY Variance
Property Size								
Under 50 rooms	48.1%	2.1	45.2%	1.9	\$110.99	5.4%	\$111.63	4.2%
50-75 rooms	54.4%	0.3	51.4%	0.1	\$111.82	1.8%	\$110.79	0.7%
76-125 rooms	60.0%	-1.1	56.3%	-0.8	\$127.58	1.9%	\$126.29	1.4%
126-200 rooms	64.1%	-0.4	58.8%	-0.4	\$140.48	1.9%	\$137.79	1.5%
201-500 rooms	66.8%	-0.1	62.2%	-0.4	\$180.33	4.2%	\$178.29	2.0%
Over 500 rooms	70.4%	1.1	64.4%	-1.6	\$222.88	5.0%	\$215.55	3.2%
Total	62.4%	-0.2	58.1%	-0.4	\$151.69	3.2%	\$149.27	1.7%
Property Type								
Limited Service	57.3%	-0.0	53.7%	0.0	\$117.24	2.1%	\$115.65	1.7%
Full Service	66.1%	-0.4	60.2%	-0.8	\$168.05	3.8%	\$160.00	2.3%
Suite Hotel	70.4%	-1.7	66.6%	-0.7	\$156.82	2.3%	\$153.96	-0.1%
Resort	52.6%	1.6	57.8%	0.6	\$200.38	4.4%	\$241.99	2.7%
Total	62.4%	-0.2	58.1%	-0.4	\$151.69	3.2%	\$149.27	1.7%
Price Level								
Budget	57.0%	0.4	52.6%	0.8	\$102.67	3.0%	\$101.94	3.0%
Mid-Price	62.8%	-0.8	58.3%	-0.9	\$143.19	2.5%	\$139.17	1.4%
Upscale	67.8%	1.2	63.8%	-0.4	\$238.68	3.7%	\$239.67	1.4%
Total	62.4%	-0.2	58.1%	-0.4	\$151.69	3.2%	\$149.27	1.7%

Note: Based on the operating results of 237,545 rooms (unweighted data).

^ Percentage points.

- In April and YTD 2019, occupancy rates generally increased by property size, though the smallest properties (<50 rooms) recorded the biggest improvements compared to 2018.
- A similar trend was observed with ADR generally increasing by property size, and those smallest properties reporting the strongest year-over-year growth.
- In April and YTD 2019, suite hotels reported the highest occupancy rates, while resorts reported the highest ADR. Full service properties also reported a higher ADR than suite hotels. Both metrics also increased by price level.