



# TOURISM SNAPSHOT

**Q4 2019**

An ongoing monitor of the performance of Canada's tourism sector

60°43'23.8"N 135°03'17.8"W

Whitehorse

Yukon

# Important note regarding the Frontier Counts data

Destination Canada reports on overnight arrivals, defined as those visitors that stay longer than 24 hours. Numbers may differ from those reported by Statistics Canada, which include same-day arrivals (visitors who stay less than 24 hours).

The data in this report is as current as possible, however due to updates from Statistics Canada, there may be minor discrepancies between this data and that posted online by Statistics Canada.

Due to the methodological changes noted below, the most accurate assessment of a market's trends and performance is to compare air and sea arrivals with past years. This applies to all international markets, except the US.

**Land port data:** As of August 2018, there have been significant changes in how country of residence data is collected and established for non-US visitors entering Canada by land ports. 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 against previous years. This is because 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 on same-day or overnight visits.

<sup>1</sup> Note: The caveat from Statistics Canada associated with the December 2019 data is available [here](#).

## Quick links

# Key highlights – Annual 2019

- 2019 was the best year for Canadian tourism on record, reaching 22.1 million international overnight arrivals, 4.8% year-over-year.
- Canada earned strong arrival performances from several markets, which together acted as counterweights to headwinds affecting Canada's two largest long-haul markets, the United Kingdom (+0.9% in air and sea arrivals) and China (-9.1% in air and sea arrivals).
- As several of Destination Canada's markets continued to move through times of economic and political uncertainty, air and sea arrivals from the Europe region were mostly on par with 2018 levels, with the exception of France, which led the region (+7.0%). Meanwhile there were mixed results from the Asia-Pacific region. The biggest decline came from the region's largest market, China (-9.1% in air and sea arrivals), with smaller downward trends from Japan (-1.9%) and Australia (-0.4%). More positively, air and sea arrivals from South Korea were slightly ahead of 2018 levels, while India led the region in year-over-year growth (+9.1%).
- In North America, the US made solid progress in arrivals on overnight trips entering Canada by air and auto (+6.4%), while Mexico was the only one of Destination Canada's long-haul markets to record double-digit year-over-year growth in overnight arrivals by air and sea (+12.3%) in 2019.

## Arrivals of international overnight visitors to Canada – Year-to-date December 2019

Year-to-date December 2019	Total Overnight/Tourist Arrivals											
	All Modes*		Non-Land Arrivals								Land Overnight*	
			Total		Air Direct		Air Via US		Water (Cruise)			
Markets	Arrivals	Year-over-year change	Arrivals	Year-over-year change	Arrivals	Year-over-year change	Arrivals	Year-over-year change	Arrivals	Year-over-year change	Arrivals	Year-over-year change*
US	14,994,045	3.8%										
Auto	8,460,525	3.4%										
Air	5,133,723	11.8%										
Auto & Air	13,594,248	6.4%										
Other	1,399,797	-15.9%										
DC Long-Haul	4,317,670	5.9%	3,682,189	1.6%	2,932,720	3.0%	567,320	-6.9%	182,149	7.5%	635,481	40.7%
UK	875,632	10.6%	735,575	0.9%	593,144	0.2%	85,583	-7.2%	56,848	28.1%	140,057	123.3%
France	668,490	10.6%	592,431	7.0%	516,107	13.1%	73,016	-23.6%	3,308	78.1%	76,059	50.4%
China	712,474	-3.4%	585,026	-9.1%	506,833	-8.0%	64,031	-20.8%	14,162	16.2%	127,448	36.4%
Mexico	495,627	22.6%	420,641	12.3%	334,297	10.8%	71,305	20.3%	15,039	10.7%	74,986	150.7%
Germany	411,989	1.5%	357,762	0.6%	287,867	3.8%	41,556	-9.8%	28,339	-12.2%	54,227	8.0%
Australia	354,372	1.5%	312,244	-0.4%	151,591	3.6%	119,384	-3.1%	41,269	-6.1%	42,128	19.0%
India	333,111	15.9%	285,957	9.1%	237,862	11.2%	37,589	0.6%	10,506	-3.3%	47,154	86.0%
South Korea	213,588	-13.1%	169,078	2.3%	132,021	0.9%	30,930	6.4%	6,127	14.7%	44,510	-44.7%
Japan	252,387	0.5%	223,475	-1.9%	172,998	-2.1%	43,926	-4.6%	6,551	30.3%	28,912	22.9%
Total Non-US	7,147,894	6.8%	6,121,512	1.8%	4,841,039	3.6%	1,022,709	-7.6%	257,764	9.7%	1,026,382	51.3%
<b>Total</b>	<b>22,141,939</b>	<b>4.8%</b>										

Source: Statistics Canada, Frontier Counts Custom Tabulations

Note: For performance assessment purposes relative to the previous year, the red-shaded columns highlight arrival summary metrics that are comparable to 2018 arrivals levels.

# Key highlights – Q4 2019

- Over the fourth quarter of 2019, international overnight arrivals increased 4.1%, year-over-year, representing a third quarter of consecutive growth.
- Air arrivals of US residents (+7.5%) and of non-US residents direct from overseas (+7.1%) saw the fastest growth between October and December 2019, while air arrivals via the US of non-US residents saw a double-digit contraction (-10.2%).
- Arrivals of US residents on overnight trips to Canada expanded 3.9%.
- Air arrivals direct from overseas expanded in eight of Destination Canada's nine long-haul markets in Q4 2019 with India achieving the fastest growth (+29.4%), followed by Mexico (+17.4%) and Germany (10.3%).
- China (-5.9%) posted the only decline in air arrivals direct from overseas, contracting for a sixth consecutive quarter. This was accompanied by a 7.5% reduction in seats on non-stop air services in Q4 2019. Chinese air arrivals via the US also fell for an eighth consecutive quarter, falling by 29.6% in Q4 2019.
- Overnight arrivals by all modes of entry from Destination Canada's long-haul markets increased by an average of 3.9% in Q4 2019. Excluding China, sustained growth in air arrivals direct from overseas offset losses sustained in arrivals through various modes of entry via the US in most markets, with the exception of Australia and South Korea.

## Arrivals of international overnight visitors to Canada – Q4 2019

Q4-19 Markets	Total Overnight/Tourist Arrivals												
	All Modes*		Non-Land Arrivals								Land Overnight*		
	Arrivals	Year-over-year change	Total		Air Direct		Air Via US		Water (Cruise)		Arrivals	Year-over-year change*	
Arrivals			Year-over-year change	Arrivals	Year-over-year change	Arrivals	Year-over-year change	Arrivals	Year-over-year change				
US	2,852,169	3.8%											
Auto	1,584,498	3.9%											
Air	1,090,291	7.5%											
Auto & Air	2,674,789	5.3%											
Other	177,380	-14.3%											
DC Long-Haul	801,632	3.9%	693,318	4.6%	561,845	7.0%	113,157	-11.5%	18,316	78.2%	108,314	0.1%	
UK	149,184	5.1%	125,783	1.8%	104,821	2.5%	16,764	-11.4%	4,198	74.4%	23,401	28.0%	
France	125,906	6.4%	113,146	5.2%	97,395	8.4%	14,601	-16.8%	1,150	609.9%	12,760	18.8%	
China	124,803	-9.7%	103,095	-9.3%	90,401	-5.9%	12,113	-29.6%	581	74.5%	21,708	-11.6%	
Mexico	106,446	16.1%	91,841	12.6%	77,176	17.4%	14,097	-8.7%	568	34.6%	14,605	44.2%	
Germany	67,177	8.1%	60,782	10.5%	44,249	10.3%	7,912	-16.8%	8,621	60.2%	6,395	-10.6%	
Australia	68,276	-0.9%	60,509	0.4%	33,587	4.3%	25,239	-6.5%	1,683	51.8%	7,767	-9.9%	
India	60,828	23.9%	53,005	25.7%	46,196	29.4%	6,706	6.2%	103	-34.8%	7,823	13.2%	
South Korea	42,475	-8.2%	34,209	7.6%	27,744	7.6%	6,276	5.5%	189	225.9%	8,266	-42.9%	
Japan	56,537	3.4%	50,948	7.5%	40,276	8.4%	9,449	-5.4%	1,223	387.3%	5,589	-23.2%	
Total Non-US	1,343,547	4.9%	1,168,580	4.5%	936,795	7.1%	206,287	-10.2%	25,498	89.8%	174,967	7.4%	
<b>Total</b>	<b>4,195,716</b>	<b>4.2%</b>											

Source: Statistics Canada, Frontier Counts Custom Tabulations

Note: For performance assessment purposes relative to the previous year, the red-shaded columns highlight arrival summary metrics that are comparable to 2018 arrivals levels.

# Key highlights – December 2019

- In December 2019, the number of overnight visitors to Canada topped 1.45 million, up 3.7% over December 2018. This represented a new record number of overnight arrivals for that month and a sixth consecutive year of growth. Gains in the December 2019 arrivals originated both from the United States (+3.4%) and from the rest of the world (+4.4%). Air arrivals performance from Destination Canada's long-haul markets (+4.1%) was entirely driven by air arrivals direct from overseas, which soared to +7.9%, more than offsetting a drop in air arrivals via the United States (-12.0%). December 2019 air arrivals via the United States saw double digit declines from most of Destination Canada's long-haul markets, except Australia (-8.4%), India (+11.7%) and South Korea (+6.8%).
- Overnight arrivals from the United States in December 2019 were primarily driven by a surge in air arrivals (+11.6%), as well as an uptick in auto arrivals (+1.4%).
- In December 2019, air arrivals of international visitors to Canada reached 810,000 arrivals. This marked an increase of +7.9% over 2018. Of those international air arrivals, 53% were from countries other than the United States. While the number of visitors from countries other than the United States entering Canada by air increased 4.8% relative to the previous year, robust gains in their air arrivals direct from overseas (+8.6%) overshadowed a double-digit contraction in their arrivals via the United States (-10.6%).
- Among Destination Canada's key long-haul markets, air arrivals saw significant gains from India (+36.8%), South Korea (15.4%) and Mexico (+11.7%) in December 2019, which helped counterbalance declines from China (-5.3%), Australia (-4.3%) and the United Kingdom (-0.9%). Consistent with these results, the number of seats offered on non-stop air services to Canada from China, Australia and the United Kingdom declined 2.7%, while seats on non-stop air services from the other long-haul markets increased 8.9%.

## Arrivals of international overnight visitors to Canada – December 2019

Markets	Total Overnight/Tourist Arrivals												
	All Modes*		Non-Land Arrivals								Land Overnight*		
	Arrivals	Year-over-year change	Total		Air Direct		Air Via US		Water (Cruise)		Arrivals	Year-over-year change	
US	976,428	3.4%											
Auto	572,678	1.4%											
Air	377,792	11.6%											
Auto & Air	950,470	5.2%											
Other	25,958	-36.6%											
DC Long-Haul	282,437	3.5%	253,478	4.1%	211,616	7.9%	41,828	-12.0%	34	41.7%	28,959	-1.0%	
UK	51,615	-0.5%	46,105	-0.9%	40,813	0.7%	5,275	-11.5%	17	70.0%	5,510	3.1%	
France	41,917	2.2%	39,320	2.7%	35,052	5.4%	4,256	-15.5%	12	0.0%	2,597	-4.8%	
China	39,047	-5.9%	34,030	-5.3%	29,873	-1.8%	4,157	-24.5%	0	-100.0%	5,017	-9.9%	
Mexico	46,033	12.3%	41,156	11.7%	34,533	19.9%	6,623	-17.4%	0	0.0%	4,877	17.0%	
Germany	15,248	4.5%	14,179	5.5%	12,145	9.7%	2,033	-14.0%	1	0.0%	1,069	-7.0%	
Australia	35,553	-5.2%	32,222	-4.3%	19,170	-1.3%	13,052	-8.4%	0	0.0%	3,331	-12.6%	
India	23,639	32.4%	20,680	36.7%	18,717	40.1%	1,959	11.7%	4	-69.2%	2,959	8.3%	
South Korea	14,402	13.5%	12,341	15.4%	10,253	17.3%	2,088	6.8%	0	0.0%	2,061	3.4%	
Japan	14,983	0.9%	13,445	2.6%	11,060	6.0%	2,385	-10.6%	0	0.0%	1,538	-12.3%	
Total Non-US	478,500	4.4%	432,002	4.8%	357,883	8.6%	73,991	-10.6%	128	-12.9%	46,498	0.9%	
<b>Total</b>	<b>1,454,928</b>	<b>3.7%</b>											

Source: Statistics Canada, Frontier Counts Custom Tabulations

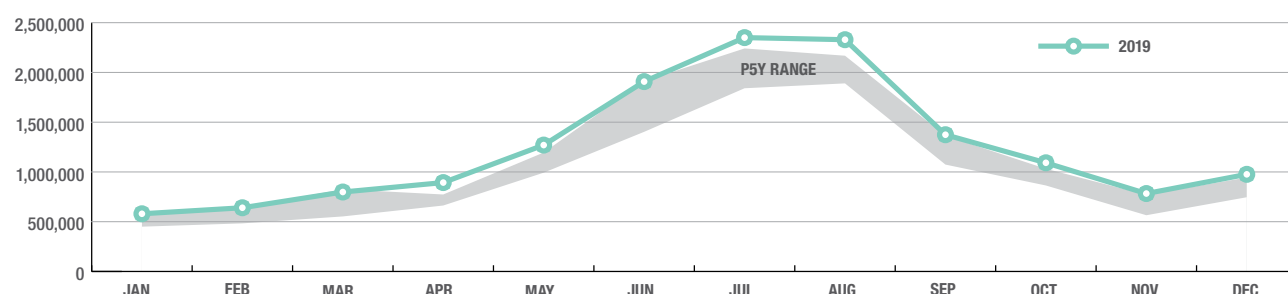
Note: For performance assessment purposes relative to the previous year, the red-shaded columns highlight arrival summary metrics that are comparable to 2018 arrivals levels.

# UNITED STATES

## Current Trends

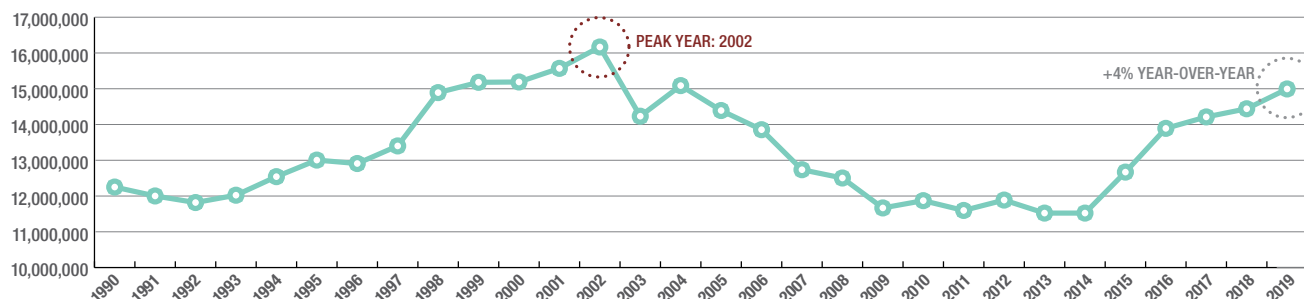
- Total annual overnight arrivals from the US expanded by 3.8% over 2018, including an 11.8% year-over-year increase in air arrivals and +3.4% by automobile. Annual overnight arrivals from the US have been increasing consistently over the last five years, and 2019 performance fell at the top or ahead of the past-5-year range every month this year.
- Over the fourth quarter (Q4) of 2019, 2.85 million United States residents visited Canada, maintaining the positive momentum recorded over Q2 and Q3 2019 and bringing the total number of annual overnight arrivals from the US to 14.99 million in 2019.
- The strong performance of US air arrivals, which was supported by a slight expansion of direct air capacity between the US and Canada in 2019 (+1.9%), was consistent throughout the year but particularly strong in Q2 (+19.3%) and Q3 (+12.7%).
- US auto arrivals maintained consistent growth from Q2 through Q4 2019, recovering well from a difficult year in 2018 due to summer forest fires in Western Canada.
- The positive trend in US visitation was also supported by a slight increase in the purchasing power of the US dollar in Canada (+2.4% year-over-year) in 2019.

## Overnight Arrivals by Month: Past 5-Year Trend



Source: Statistics Canada, Frontier counts custom tabulations

## December Year-to-date Arrivals Long-Term Trend



Source: Statistics Canada, Frontier counts custom tabulations

## Overnight Arrivals by Mode

Overnight Arrivals	Q1	Year-over-year change	Q2	Year-over-year change	Q3	Year-over-year change	Q4	Year-over-year change
Total (all modes)	2,018,152	-1.1%	4,071,080	4.9%	6,052,644	4.8%	2,852,169	3.8%
✈️ Air	843,851	4.5%	1,408,720	19.3%	1,790,861	12.7%	1,090,291	7.5%
🚗 Auto	1,096,715	-2.0%	2,235,077	5.0%	3,544,235	3.9%	1,584,498	3.9%
🚶 Other	77,586	-31.8%	427,283	-25.1%	717,548	-7.3%	177,380	-14.3%

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

# UNITED STATES

## Overnight Arrivals by Province - Q4 2019

Overnight Arrivals	Total (all modes)	✈️ Air	🚗 Auto	🗨️ Other
Alberta	144,131	126,119	17,718	294
YOY* change	5.8%	7.5%	-3.6%	-53.2%
British Columbia	668,277	227,724	401,596	38,957
YOY change	-0.9%	8.3%	1.5%	-43.3%
Saskatchewan	19,235	6,224	12,971	40
YOY change	6.8%	6.8%	8.0%	-77.5%
Manitoba	44,043	17,680	25,951	412
YOY change	2.4%	11.6%	-3.3%	24.5%
Ontario	1,391,289	510,900	828,286	52,103
YOY change	5.7%	7.9%	5.7%	-12.1%
Quebec	458,586	188,540	252,904	17,142
YOY change	3.3%	4.7%	3.5%	-12.0%
Nova Scotia	40,255	11,682	0	28,573
YOY change	-1.4%	16.8%	-100.0%	-5.9%

Overnight Arrivals	Total (all modes)	✈️ Air	🚗 Auto	🗨️ Other
New Brunswick	73,143	100	36,300	36,743
YOY change	19.9%	53.8%	3.7%	41.8%
Prince Edward Island	34	34	0	0
YOY change	-12.8%	-12.8%	0.0%	0.0%
Newfoundland and Labrador	3,905	1,187	0	2,718
YOY change	15.2%	-7.0%	0.0%	28.6%
Nunavut	31	31	0	0
YOY change	933.3%	933.3%	0.0%	0.0%
Yukon	9,240	70	8,772	398
YOY change	-2.2%	141.4%	-6.6%	1,558.3%

YOY = year-over-year

Source: Statistics Canada, Table 24-10-0043-01 (formerly CANSIM 427-0004)

## 2019 Key Indicators

	Quarter 4	Year-to-date
Exchange Rate <sup>1</sup>	-0.1%	2.4%
Air Capacity <sup>2</sup>	-0.5%	1.9%
Consumer Confidence Index <sup>3</sup>	101.1	101.1

<sup>1</sup> Bank of Canada

<sup>2</sup> IATA - Diio SRS Analyser

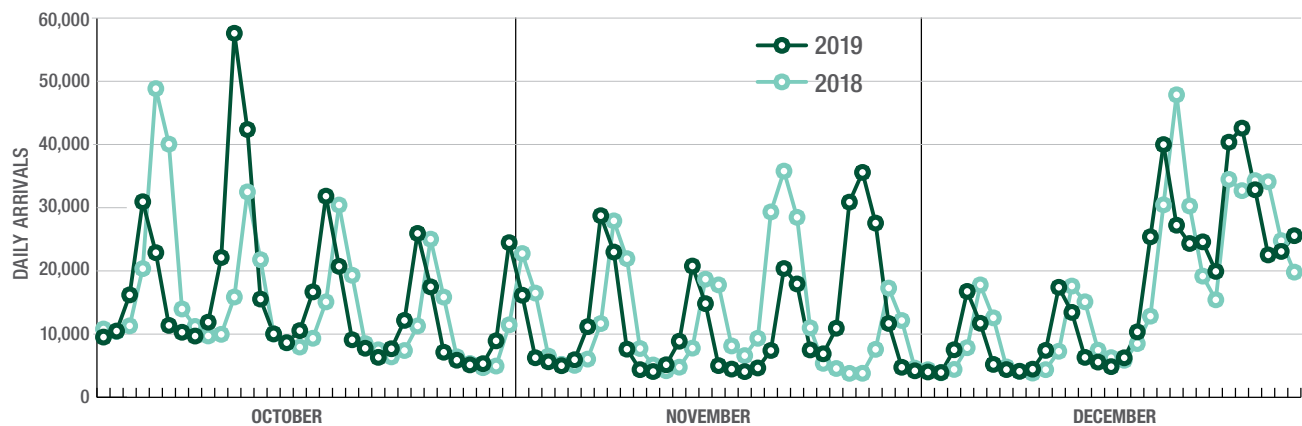
<sup>3</sup> OECD

Notes:

i. Air seat capacity is the variation in the total number of seats on direct commercial scheduled flights during the current quarter and YTD relative to the same periods in the previous year.

ii. The exchange rate variation is calculated on the average value of the Canadian Dollar during the current quarter and YTD relative to the same periods in the previous year.

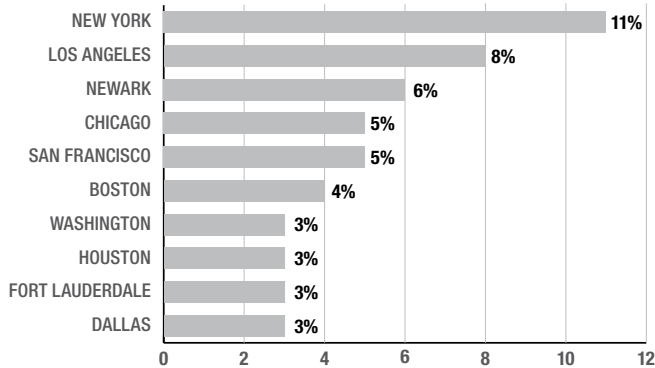
## Daily US Overnight Auto Arrivals - Q4 2019



Source: Statistics Canada, Integrated Primary Inspection Lane statistics

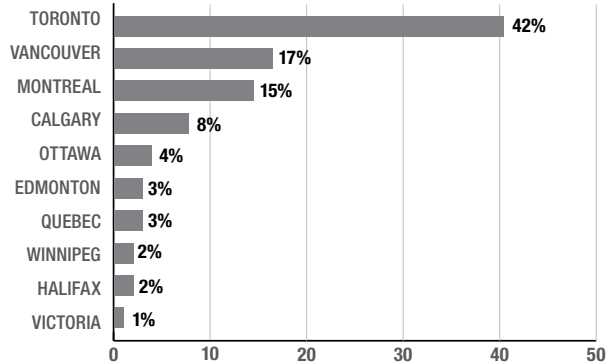
# UNITED STATES

## **Top Origin Cities - Q4 2019 (Air Travel)**



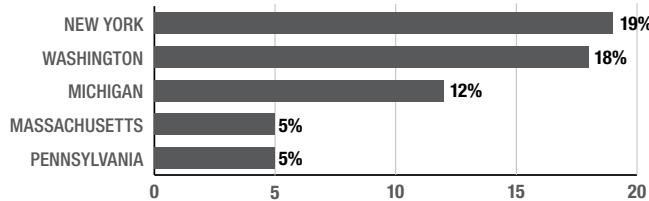
Source: IATA, Global Agency Pro

## **Top Destination Cities - Q4 2019 (Air Travel)**



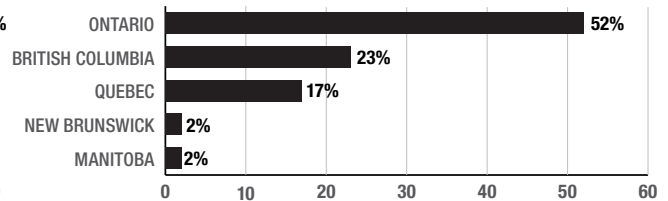
Source: IATA, Global Agency Pro

## **Top 5 Origin States - Q4 2019 (Overnight Auto Arrivals)**



Source: Statistics Canada, Integrated Primary Inspection Lane statistics

## **Top 5 Destination Provinces - Q4 2019 (Overnight Auto Arrivals)**



Source: Statistics Canada, Integrated Primary Inspection Lane statistics

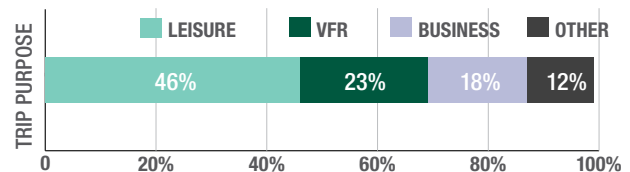
## 2019 Key Facts

<b>Canada's market share of total outbound travel<sup>1</sup></b>	15.4%
<b>Global outbound departures rank<sup>1*</sup></b>	#2
<b>Global tourism expenditures rank<sup>2</sup></b>	#2

Source: <sup>1</sup>Oxford Economics

<sup>2</sup>UNWTO, World Tourism Barometer

\*Note: This metric denotes the ranking of the United States as a source of international tourists in the world.



	Total	Leisure	VFR	Business
Average trip length (days)	5.0	4.5	5.4	4.2
Average spend per day	\$141.9	\$171.9	\$70.5	\$234.0
Average trip spend	\$711.4	\$771.7	\$378.9	\$971.4

Source: Statistics Canada, Visitor Travel Survey

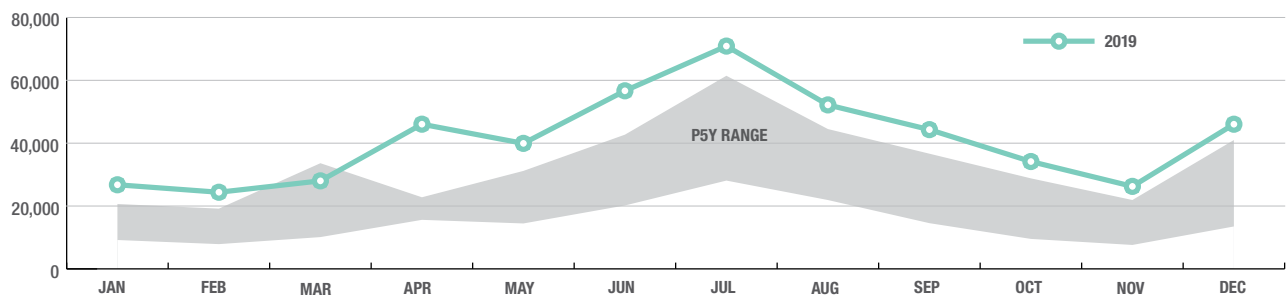


# MEXICO

## Current Trends

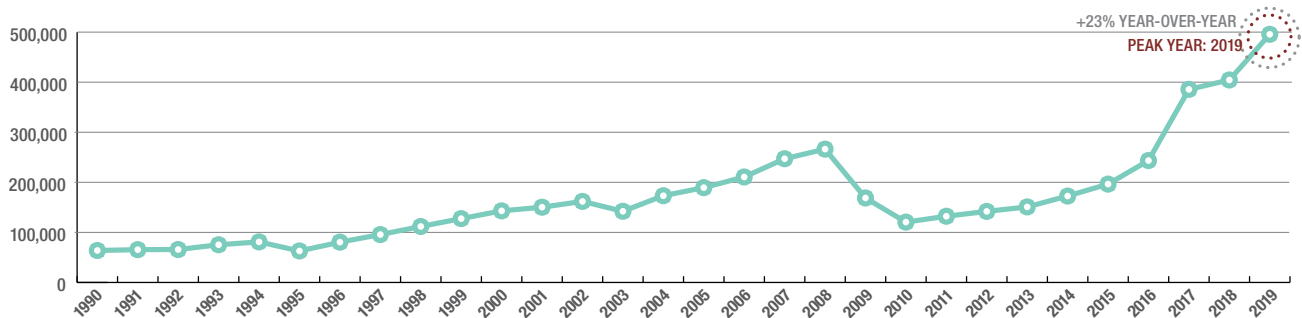
- This marks the third consecutive year of record annual arrivals from Mexico since the replacement of the visa requirement for Mexican citizens with the electronic travel authorization (eTA) in December 2016. As a result of this continuous growth over the past three years, Mexico was the fourth largest long-haul market for travel to Canada in 2019, surpassing Germany in annual arrivals for the first time.
- With 106,000 visitors in the fourth quarter of 2019, annual overnight arrivals from Mexico reached 496,000 in 2019, including 421,000 who travelled to Canada by air or cruise (+12.3% year-over-year).
- Unlike many other long-haul markets, there was a strong increase in air arrivals via the US (+20.3%) from Mexico in addition to higher direct air arrivals (+10.8%). This recovery follows a year of steep declines in Mexican travel to Canada via the US in 2018.
- Supported by a slight expansion in direct air capacity between Mexico City and Canada (+1.1%) and improved purchasing power of the Mexican peso in Canada (+2.2% year-over-year), overnight arrivals from Mexico increased year-over-year through all four quarters of 2019.

## Overnight Arrivals by Month: Past 5-Year Trend



Source: Statistics Canada, Frontier counts custom tabulations

## December Year-to-date Arrivals Long-Term Trend



Source: Statistics Canada, Frontier counts custom tabulations

## Overnight Arrivals by Mode

Overnight Arrivals	Q1	Year-over-year change	Q2	Year-over-year change	Q3	Year-over-year change	Q4	Year-over-year change
Total (all modes)	79,156	7.8%	142,642	47.6%	167,383	17.4%	106,446	16.1%
✈️ Air direct from overseas	58,426	2.0%	95,050	25.6%	103,645	0.6%	77,176	17.4%
✈️ Air via US	12,563	5.5%	21,540	64.7%	23,105	22.6%	14,097	-8.7%
🚗 Land	8,161	91.2%	22,008	475.2%	30,212	158.5%	14,605	44.2%
🌊 Sea	6	0.0%	4,044	-0.8%	10,421	14.7%	568	34.6%

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

# MEXICO

## Overnight Arrivals by Province - Q4 2019

Overnight Arrivals	Total (all modes)	Air direct from overseas	Air via US	Land	Sea
Alberta	3,700	1,763	1,823	114	0
YOY* change	3.4%	-12.0%	29.5%	-31.3%	0.0%
British Columbia	31,440	23,286	4,169	3,902	83
YOY change	3.8%	8.4%	-15.4%	2.0%	38.3%
Saskatchewan	58	10	14	34	0
YOY change	-25.6%	-76.2%	133.3%	13.3%	0.0%
Manitoba	460	111	160	189	0
YOY change	51.3%	65.7%	3.9%	127.7%	0.0%
Ontario	48,050	33,814	5,325	8,910	1
YOY change	21.6%	17.6%	-9.7%	83.1%	0.0%
Quebec	22,037	18,136	2,465	1,414	22
YOY change	27.5%	36.8%	-14.7%	24.3%	0.0%

Overnight Arrivals	Total (all modes)	Air direct from overseas	Air via US	Land	Sea
Nova Scotia	214	20	79	0	115
YOY change	-29.1%	-41.2%	29.5%	0.0%	-44.4%
New Brunswick	333	0	0	14	319
YOY change	128.1%	0.0%	-100.0%	180.0%	129.5%
Newfoundland and Labrador	126	36	62	0	28
YOY change	-28.0%	-47.1%	-31.9%	0.0%	75.0%
Nunavut	0	0	0	0	0
YOY change	0.0%	0.0%	0.0%	0.0%	0.0%
Yukon	28	0	0	28	0
YOY change	86.7%	0.0%	0.0%	86.7%	0.0%

YOY = year-over-year

Source: Statistics Canada, Frontier counts, custom tabulations

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

## 2019 Key Indicators

	Quarter 4	Year-to-date
Exchange Rate <sup>1</sup>	2.9%	2.2%
Air Capacity <sup>2</sup>	10.1%	1.1%
Consumer Confidence Index <sup>3</sup>	101.9	102.5

<sup>1</sup> Bank of Canada

<sup>2</sup> IATA - Diio SRS

Analysier

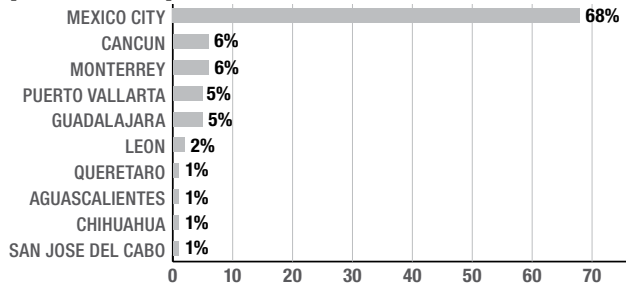
<sup>3</sup> OECD

Notes:

i. Air seat capacity is the variation in the total number of seats on direct commercial scheduled flights during the current quarter and YTD relative to the same periods in the previous year. For Mexico, only direct commercial scheduled flights between Mexico City and Canada are included.

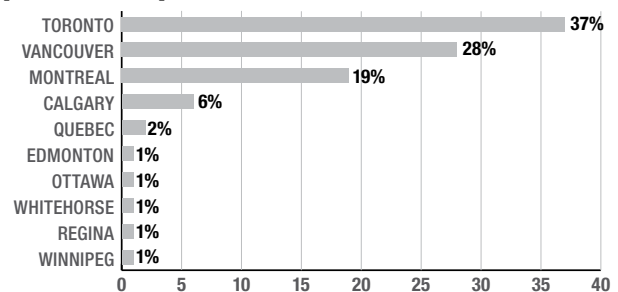
ii. The exchange rate variation is calculated on the average value of the Canadian Dollar during the current quarter and YTD relative to the same periods in the previous year.

## Top Origin Cities - Q4 2019 (Air Travel)



Source: IATA, Global Agency Pro

## Top Destination Cities - Q4 2019 (Air Travel)



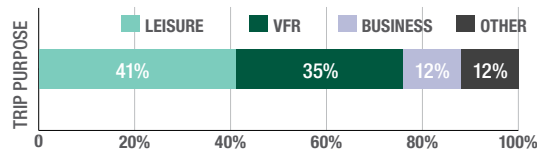
## 2019 Key Facts

Canada's market share of total outbound travel <sup>1</sup>	2.4%
Global outbound departures rank <sup>1*</sup>	#13
Global tourism expenditures rank <sup>2</sup>	#35

Source: <sup>1</sup> Oxford Economics

<sup>2</sup> UNWTO, World Tourism Barometer

\*Note: This metric denotes the ranking of Mexico as a source of international tourists in the world.



	Total	Leisure	VFR	Business
Average trip length (days)	17.2	11.7	16.9	19.3
Average spend per day	\$89.1	\$169.9	\$61.1	\$99.3
Average trip spend	\$1,546.3	\$1,829.2	\$1,069.9	\$1,487.9

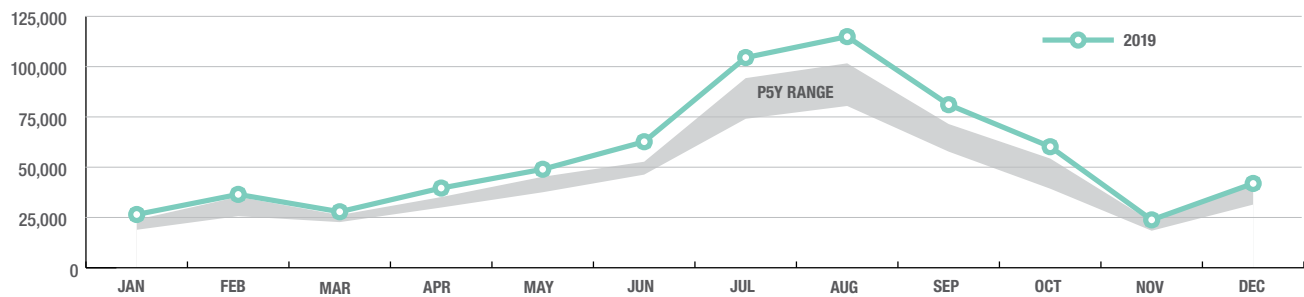
Source: Statistics Canada, Visitor Travel Survey

# FRANCE

## Current Trends

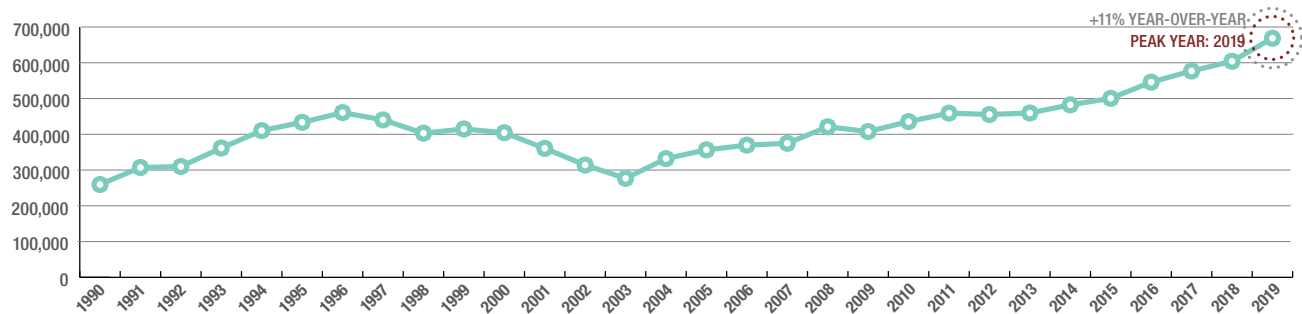
- Despite a slight decrease in the purchasing power of the euro in Canada (-2.9% year-to-date), visitation from France was consistently ahead of 2018 levels across all four quarters in 2019, with increasing air arrivals direct from overseas outweighing steep declines in air arrivals via the US. This trend was supported by the expansion of direct air capacity between France and Canada in 2019 (+7.5%), due in part to a continued expansion in air service to Montreal from Air France and Corsair.
- Over Q4 2019, the number of overnight arrivals from France reached 126,000 visitors, bringing annual 2019 arrivals up to 668,000, making France the third largest long-haul market for travel to Canada in 2019. This included 592,000 visitors who travelled to Canada by air or cruise (+7.0% year-over-year).
- Annual arrivals from France have been continuously increasing since 2009, and 2019 arrivals in Q2 and Q3 were well ahead of the past-five-year range.

## Overnight Arrivals by Month: Past 5-Year Trend



Source: Statistics Canada, Frontier counts custom tabulations

## December Year-to-date Arrivals Long-Term Trend



Source: Statistics Canada, Frontier counts custom tabulations

## Overnight Arrivals by Mode

Overnight Arrivals	Q1	Year-over-year change	Q2	Year-over-year change	Q3	Year-over-year change	Q4	Year-over-year change
Total (all modes)	90,803	6.4%	151,258	13.6%	300,523	12.4%	125,906	6.4%
✈️ Air direct from overseas	73,208	27.9%	117,513	13.3%	227,991	11.0%	97,395	8.4%
✈️ Air via US	11,473	-52.1%	17,360	-13.9%	29,582	-12.6%	14,601	-16.8%
🚗 Land	6,118	48.1%	15,902	81.7%	41,279	53.2%	12,760	18.8%
🌊 Sea	4	-80.0%	483	11.8%	1,671	34.4%	1,150	609.9%

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

# FRANCE

## Overnight Arrivals by Province - Q4 2019

Overnight Arrivals	Total (all modes)	✈️ Air direct from overseas	✈️ Air via US	🚗 Land	🌊 Sea
Alberta	1,159	918	197	44	0
YOY* change	10.4%	43.9%	-48.2%	37.5%	0.0%
British Columbia	4,729	3,067	892	750	20
YOY change	-1.8%	6.3%	-3.7%	-24.5%	42.9%
Saskatchewan	14	1	5	8	0
YOY change	0.0%	0.0%	-16.7%	0.0%	0.0%
Manitoba	71	1	41	29	0
YOY change	-13.4%	-85.7%	-19.6%	20.8%	0.0%
Ontario	22,509	10,614	7,174	4,611	110
YOY change	10.1%	-1.9%	0.7%	85.0%	2650.0%
Quebec	94,292	81,329	6,015	6,947	1
YOY change	5.0%	9.9%	-31.8%	-0.6%	0.0%

Overnight Arrivals	Total (all modes)	✈️ Air direct from overseas	✈️ Air via US	🚗 Land	🌊 Sea
Nova Scotia	1,361	1,174	62	0	125
YOY change	-8.2%	-12.7%	-36.1%	-100.0%	220.5%
New Brunswick	891	0	0	342	549
YOY change	392.3%	0.0%	-100.0%	112.4%	2789.5%
Newfoundland and Labrador	848	291	212	0	345
YOY change	97.7%	38.6%	59.4%	0.0%	301.2%
Nunavut	3	0	3	0	0
YOY change	50.0%	0.0%	50.0%	0.0%	0.0%
Yukon	29	0	0	29	0
YOY change	-23.7%	0.0%	0.0%	-23.7%	0.0%

YOY = year-over-year

Source: Statistics Canada, Frontier counts, custom tabulations

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

## 2019 Key Indicators

	Quarter 4	Year-to-date
Exchange Rate <sup>1</sup>	-3.1%	-2.9%
Air Capacity <sup>2</sup>	9.7%	7.5%
Consumer Confidence Index <sup>3</sup>	100.2	99.9

<sup>1</sup> Bank of Canada

<sup>2</sup> IATA - Diio SRS

Analysier

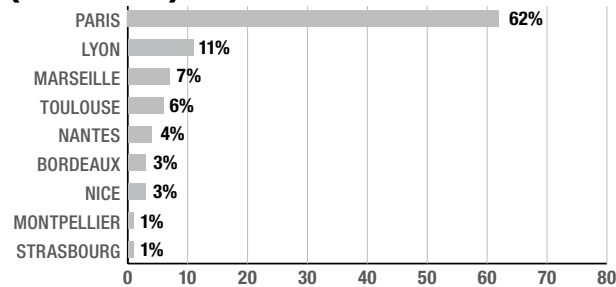
<sup>3</sup> OECD

Notes:

i. Air seat capacity is the variation in the total number of seats on direct commercial scheduled flights during the current quarter and YTD relative to the same periods in the previous year.

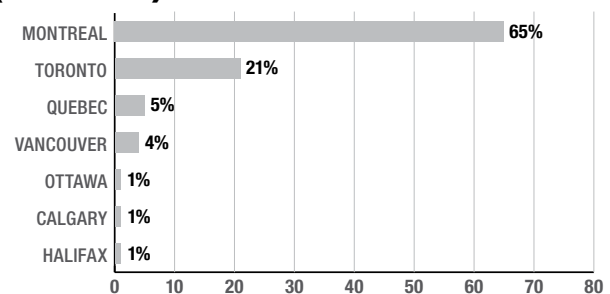
ii. The exchange rate variation is calculated on the average value of the Canadian Dollar during the current quarter and YTD relative to the same periods in the previous year.

## ✈️ Top Origin Cities - Q4 2019 (Air Travel)



Source: IATA, Global Agency Pro

## Top Destination Cities - Q4 2019 (Air Travel)



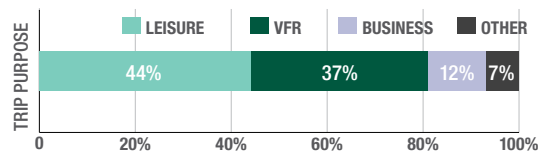
## 2019 Key Facts

Canada's market share of long-haul travel <sup>1</sup>	3.8%
Global outbound departures rank <sup>1*</sup>	#8
Global tourism expenditures rank <sup>2</sup>	#5

Source: <sup>1</sup> Oxford Economics

<sup>2</sup> UNWTO, World Tourism Barometer

\*Note: This metric denotes the ranking of France as a source of international tourists in the world.



	Total	Leisure	VFR	Business
Average trip length (days)	16.1	12.7	18.5	9.9
Average spend per day	\$88.0	\$135.9	\$56.5	\$143.2
Average trip spend	\$1,405.5	\$1,727.8	\$1,043.7	\$1,406.4

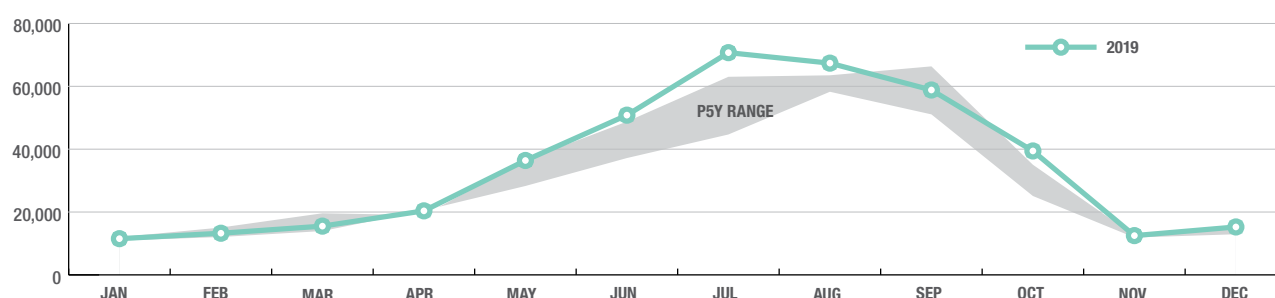
Source: Statistics Canada, Visitor Travel Survey

# GERMANY

## Current Trends

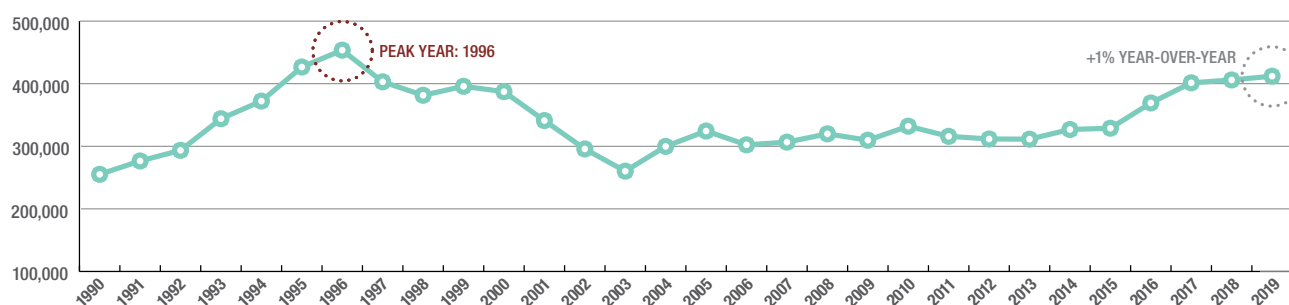
- Over Q4 2019, overnight arrivals of German residents to Canada reached 67,000, bringing annual 2019 arrivals up to 412,000. This included 358,000 visitors from Germany who entered Canada by air or cruise (+0.6% year-over-year).
- This positive annual performance continued the trend of increasing visitation from Germany over the past few years, despite a slight loss in the purchasing power of the euro relative to the Canadian dollar in 2019. Overnight arrivals in 2019 were generally on par with the past-five-year range, with particularly positive performance in the summer months.
- Following a decline in Q1 2019, which continued the downward trend in Q4 2018, overnight arrivals from Germany recovered over the next three quarters. This more positive trend was driven by increasing air arrivals direct from overseas, which outpaced declines in air arrivals via the US throughout 2019. This trend was supported by the expansion of direct air capacity between Germany and Canada in 2019 (+4.4%) servicing seven destinations in Canada. The largest increases were provided by Lufthansa and Air Canada to Toronto, Montreal and Vancouver.

## Overnight Arrivals by Month: Past 5-Year Trend



Source: Statistics Canada, Frontier counts custom tabulations

## December Year-to-date Arrivals Long-Term Trend



Source: Statistics Canada, Frontier counts custom tabulations

## Overnight Arrivals by Mode

Overnight Arrivals	Q1	Year-over-year change	Q2	Year-over-year change	Q3	Year-over-year change	Q4	Year-over-year change
Total (all modes)	40,283	-13.7%	107,604	3.2%	196,925	2.1%	67,177	8.1%
✈️ Air direct from overseas	30,836	-13.3%	78,590	8.9%	134,192	3.6%	44,249	10.3%
✈️ Air via US	6,601	-13.3%	11,368	-5.8%	15,675	-7.0%	7,912	-16.8%
🚗 Land	2,840	-18.6%	13,658	0.2%	31,334	20.9%	6,395	-10.6%
🚢 Sea	6	0.0%	3,988	-37.5%	15,724	-23.4%	8,621	60.2%

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

# GERMANY

## Overnight Arrivals by Province - Q4 2019

Overnight Arrivals	Total (all modes)	✈️ Air direct from overseas	✈️ Air via US	🚗 Land	🌊 Sea
Alberta	3,205	2,688	424	93	0
YOY* change	-10.0%	4.1%	-52.4%	4.5%	0.0%
British Columbia	11,003	7,093	1,939	1,871	100
YOY change	5.0%	18.9%	-7.4%	-19.7%	17.6%
Saskatchewan	34	0	20	14	0
YOY change	21.4%	-100.0%	100.0%	-12.5%	0.0%
Manitoba	209	2	122	85	0
YOY change	36.6%	-50.0%	13.0%	107.3%	0.0%
Ontario	27,506	21,293	3,524	2,679	10
YOY change	3.9%	6.9%	-7.2%	-2.6%	0.0%
Quebec	15,055	12,263	1,428	1,354	10
YOY change	4.0%	16.1%	-35.1%	-21.1%	0.0%

Overnight Arrivals	Total (all modes)	✈️ Air direct from overseas	✈️ Air via US	🚗 Land	🌊 Sea
Nova Scotia	3,386	632	148	0	2,606
YOY change	-2.8%	-29.4%	-0.7%	-100.0%	7.2%
New Brunswick	5,134	0	12	242	4,880
YOY change	75.6%	0.0%	0.0%	70.4%	75.4%
Newfoundland and Labrador	1,563	278	270	0	1,015
YOY change	220.3%	55.3%	18.9%	0.0%	1137.8%
Nunavut	25	0	25	0	0
YOY change	-10.7%	0.0%	-10.7%	0.0%	0.0%
Yukon	57	0	0	57	0
YOY change	-8.1%	0.0%	0.0%	-8.1%	0.0%

YOY = year-over-year

Source: Statistics Canada, Frontier counts, custom tabulations

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

## 2019 Key Indicators

	Quarter 4	Year-to-date
Exchange Rate <sup>1</sup>	-3.1%	-2.9%
Air Capacity <sup>2</sup>	3.4%	4.4%
Consumer Confidence Index <sup>3</sup>	100.8	101.0

<sup>1</sup> Bank of Canada

<sup>2</sup> IATA - Diio SRS

Analysier

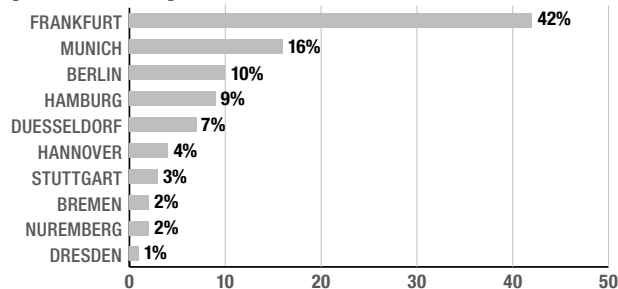
<sup>3</sup> OECD

Notes:

i. Air seat capacity is the variation in the total number of seats on direct commercial scheduled flights during the current quarter and YTD relative to the same periods in the previous year.

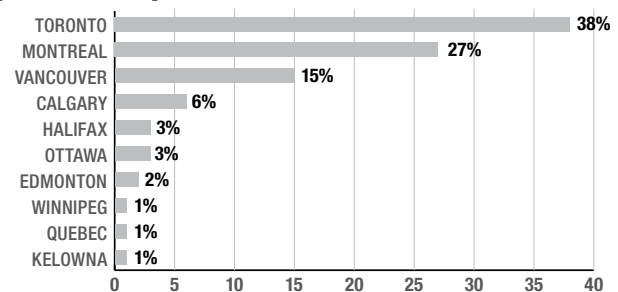
ii. The exchange rate variation is calculated on the average value of the Canadian Dollar during the current quarter and YTD relative to the same periods in the previous year.

## ✈️ Top Origin Cities - Q4 2019 (Air Travel)



Source: IATA, Global Agency Pro

## Top Destination Cities - Q4 2019 (Air Travel)



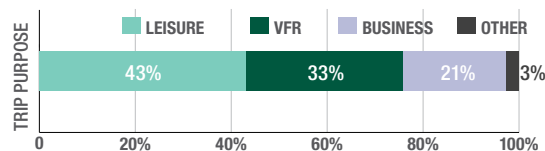
## 2019 Key Facts

Canada's market share of long-haul travel <sup>1</sup>	2.9%
Global outbound departures rank <sup>1*</sup>	#1
Global tourism expenditures rank <sup>2</sup>	#3

Source: <sup>1</sup> Oxford Economics

<sup>2</sup> UNWTO, World Tourism Barometer

\*Note: This metric denotes the ranking of Germany as a source of international tourists in the world.



	Total	Leisure	VFR	Business
Average trip length (days)	16.3	15.8	16.2	11.3
Average spend per day	\$100.6	\$143.4	\$63.2	\$124.0
Average trip spend	\$1,642.6	\$2,218.9	\$1,021.4	\$1,243.1

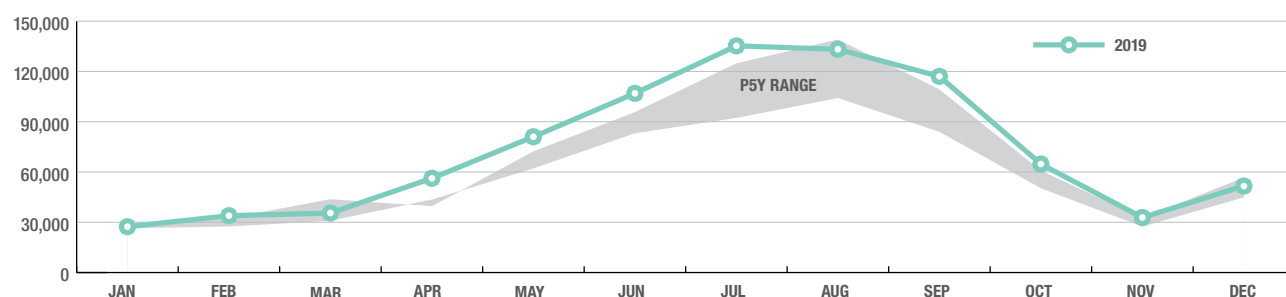
Source: Statistics Canada, Visitor Travel Survey

# UNITED KINGDOM

## Current Trends

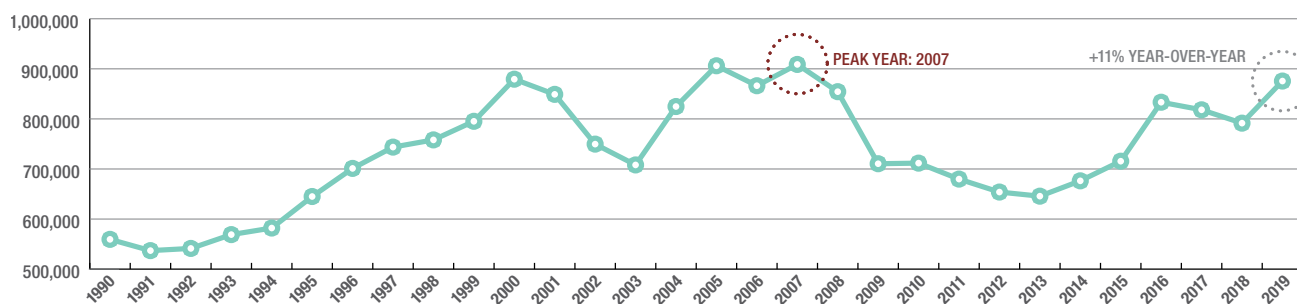
- One hundred and forty-nine thousand British visitors in Q4 2019 brought annual 2019 overnight arrivals from the United Kingdom up to 876,000, including 736,000 who travelled to Canada by air or cruise (+0.9% year-over-year). The United Kingdom maintained its position as Canada's largest long-haul visitor market in 2019.
- Despite a slightly weaker pound sterling (-2.0% year-over-year against the CAD), 2019 was a year of recovery for British travel to Canada, following a decline in annual arrivals from the UK in 2017 and 2018 amid Brexit and related economic concerns. The downward trend in visitation continued into the first quarter of 2019 before a positive shift that lasted for the next three quarters of the year.
- Compared to historical trends, overnight arrivals from the United Kingdom over the period of April to July in particular were well ahead of the past-five-year range.
- Despite the ongoing contraction of direct air capacity between the United Kingdom and Canada in 2019 (-5.8%), much of the growth recorded in Q2-Q4 2019 came from increasing air arrivals direct from overseas, which just outpaced continually declining air arrivals via the US. The reduction in seats was due in part to the grounding of Boeing 737 Max 8 aircrafts, which forced Air Canada to suspend services between St. John's and Halifax and the United Kingdom.

## Overnight Arrivals by Month: Past 5-Year Trend



Source: Statistics Canada, Frontier counts custom tabulations

## December Year-to-date Arrivals Long-Term Trend



Source: Statistics Canada, Frontier counts custom tabulations

## Overnight Arrivals by Mode

Overnight Arrivals	Q1	Year-over-year change	Q2	Year-over-year change	Q3	Year-over-year change	Q4	Year-over-year change
Total (all modes)	96,766	-12.0%	244,182	19.1%	385,500	15.2%	149,184	5.1%
✈️ Air direct from overseas	74,277	-18.1%	165,534	7.6%	248,512	1.3%	104,821	2.5%
✈️ Air via US	12,481	-12.2%	23,340	-3.9%	32,998	-5.2%	16,764	-11.4%
🚗 Land	9,962	99.1%	38,347	211.6%	68,347	151.9%	23,401	28.0%
🌊 Sea	46	228.6%	16,961	15.9%	35,643	30.4%	4,198	74.4%

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

# UNITED KINGDOM

## Overnight Arrivals by Province - Q4 2019

Overnight Arrivals	Total (all modes)	Air direct from overseas	Air via US	Land	Sea
Alberta	12,075	10,487	1,212	376	0
YOY* change	2.2%	5.0%	-27.2%	130.7%	0.0%
British Columbia	28,873	21,247	3,484	3,602	540
YOY change	8.2%	15.5%	-6.8%	-12.8%	27.7%
Saskatchewan	85	3	60	22	0
YOY change	97.7%	-25.0%	122.2%	83.3%	0.0%
Manitoba	321	7	187	127	0
YOY change	40.2%	-41.7%	27.2%	81.4%	0.0%
Ontario	87,287	60,449	9,091	17,743	4
YOY change	8.7%	3.6%	-7.9%	47.0%	100.0%
Quebec	15,261	11,600	2,304	1,194	163
YOY change	-7.1%	-2.9%	-22.9%	-20.0%	0.0%

Overnight Arrivals	Total (all modes)	Air direct from overseas	Air via US	Land	Sea
Nova Scotia	2,699	848	206	0	1,645
YOY change	-32.5%	-69.1%	-32.7%	-100.0%	75.2%
New Brunswick	1,960	0	0	318	1,642
YOY change	107.2%	0.0%	-100.0%	0.0%	163.6%
Newfoundland and Labrador	600	180	216	0	204
YOY change	-58.1%	-78.8%	31.7%	0.0%	-51.4%
Nunavut	4	0	4	0	0
YOY change	-66.7%	-100.0%	-55.6%	0.0%	0.0%
Yukon	19	0	0	19	0
YOY change	-9.5%	0.0%	-100.0%	11.8%	0.0%

YOY = year-over-year

Source: Statistics Canada, Frontier counts, custom tabulations

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

## 2019 Key Indicators

	Quarter 4	Year-to-date
Exchange Rate <sup>1</sup>	0.1%	-2.0%
Air Capacity <sup>2</sup>	-3.1%	-5.8%
Consumer Confidence Index <sup>3</sup>	100.1	99.9

<sup>1</sup> Bank of Canada

<sup>2</sup> IATA - Diio SRS

Analysier

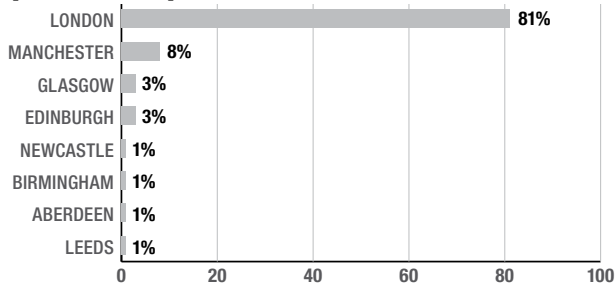
<sup>3</sup> OECD

Notes:

i. Air seat capacity is the variation in the total number of seats on direct commercial scheduled flights during the current quarter and YTD relative to the same periods in the previous year.

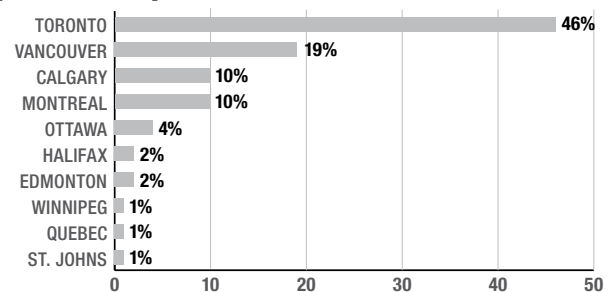
ii. The exchange rate variation is calculated on the average value of the Canadian Dollar during the current quarter and YTD relative to the same periods in the previous year.

## Top Origin Cities - Q4 2019 (Air Travel)



Source: IATA, Global Agency Pro

## Top Destination Cities - Q4 2019 (Air Travel)



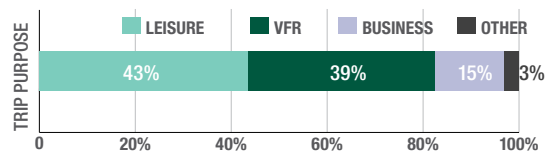
## 2019 Key Facts

Canada's market share of long-haul travel <sup>1</sup>	4.0%
Global outbound departures rank <sup>1</sup>	#3
Global tourism expenditures rank <sup>2</sup>	#4

Source: <sup>1</sup> Oxford Economics

<sup>2</sup> UNWTO, World Tourism Barometer

\*Note: This metric denotes the ranking of the United Kingdom as a source of international tourists in the world.



	Total	Leisure	VFR	Business
Average trip length (days)	12.2	9.9	14.4	9.2
Average spend per day	\$114.8	\$187.1	\$61.4	\$175.7
Average trip spend	\$1,402.4	\$1,838.0	\$861.6	\$1,529.6

Source: Statistics Canada, Visitor Travel Survey

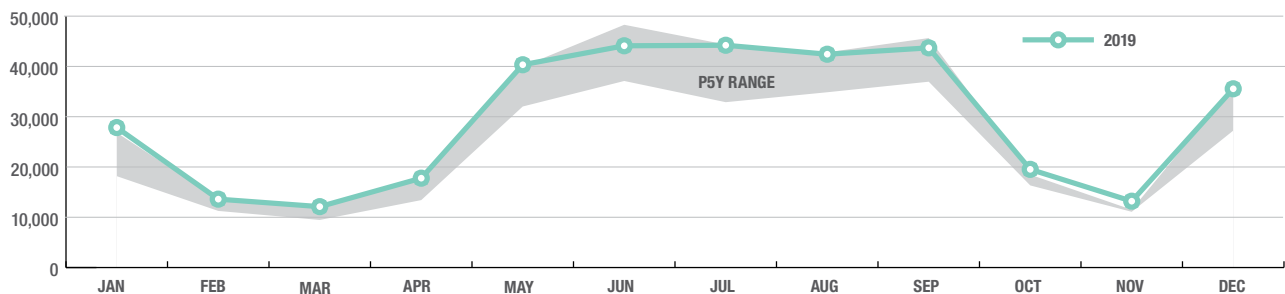


# AUSTRALIA

## Current Trends

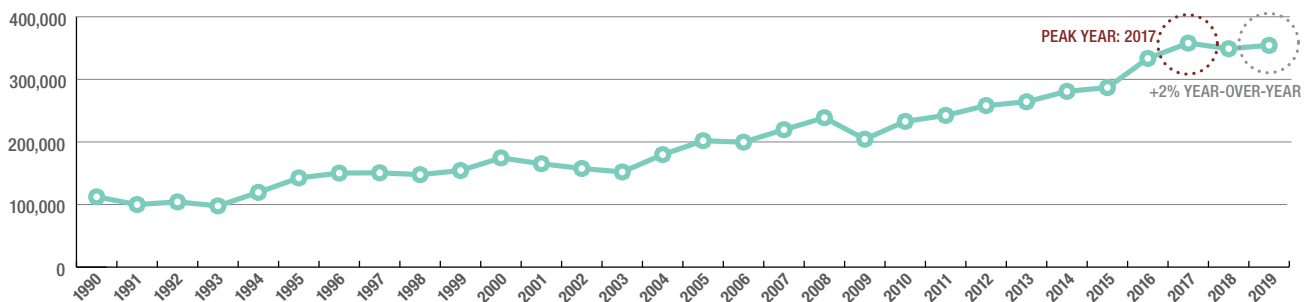
- Sixty-eight thousand Australian visitors over Q4 2019 brought annual 2019 overnight arrivals from Australia up to 354,000. Air and sea arrivals from Australia were almost on par with 2018 levels (-0.4% year-over-year).
- Despite a decrease in the purchasing power of the Australian dollar in Canada in 2019 (-4.8% year-over-year), compared with historical trends monthly arrivals from Australia generally fell towards the top end of the past-five-year range throughout 2019. While year-over-year growth was minimal, it continued the general positive trend in visitation from Australia over the past several years.
- With expanded direct air capacity between Australia and Canada in 2019 (+7.4%), direct air arrivals from Australia increased in every quarter except for a slight decline in Q3 2019. Overall growth in air arrivals was tempered by air arrivals via the US, which declined in every quarter except Q3 2019.
- Consistent with declining Australian travels to the United States, cruise arrivals from Alaska, which are an important source of visitors from Australia, also declined during the main cruise season (Q2-Q3 2019), including a double-digit decline in Q3 2019 (-10.7% year-over-year).

## Overnight Arrivals by Month: Past 5-Year Trend



Source: Statistics Canada, Frontier counts custom tabulations

## December Year-to-date Arrivals Long-Term Trend



Source: Statistics Canada, Frontier counts custom tabulations

## Overnight Arrivals by Mode

Overnight Arrivals	Q1	Year-over-year change	Q2	Year-over-year change	Q3	Year-over-year change	Q4	Year-over-year change
Total (all modes)	53,557	3.2%	102,212	2.4%	130,327	1.5%	68,276	-0.9%
✈️ Air direct from overseas	27,867	8.8%	41,468	5.3%	48,669	-1.0%	33,587	4.3%
✈️ Air via US	20,557	-6.0%	31,814	-3.0%	41,774	0.5%	25,239	-6.5%
🚗 Land	5,130	15.6%	11,502	20.4%	17,729	38.5%	7,767	-9.9%
🌊 Sea	3	0.0%	17,428	-3.4%	22,155	-10.7%	1,683	51.8%

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

# AUSTRALIA

## Overnight Arrivals by Province - Q4 2019

Overnight Arrivals	Total (all modes)	✈️ Air direct from overseas	✈️ Air via US	🚗 Land	🌊 Sea
Alberta	4,054	214	3,736	104	0
YOY* change	-1.7%	-39.2%	1.4%	18.2%	0.0%
British Columbia	43,418	29,067	9,260	4,926	165
YOY change	-0.4%	5.7%	-9.3%	-13.8%	-14.5%
Saskatchewan	56	4	30	22	0
YOY change	-16.4%	0.0%	3.4%	-42.1%	0.0%
Manitoba	299	0	160	139	0
YOY change	-2.9%	-100.0%	-18.8%	56.2%	0.0%
Ontario	14,657	3,623	9,046	1,969	19
YOY change	-1.6%	3.5%	-5.8%	10.7%	0.0%
Quebec	4,085	663	2,858	511	53
YOY change	-13.0%	-14.5%	-7.5%	-38.7%	0.0%

Overnight Arrivals	Total (all modes)	✈️ Air direct from overseas	✈️ Air via US	🚗 Land	🌊 Sea
Nova Scotia	690	13	144	0	533
YOY change	-9.1%	-64.9%	-8.9%	0.0%	-5.5%
New Brunswick	798	0	0	46	752
YOY change	231.1%	0.0%	0.0%	4.5%	281.7%
Newfoundland and Labrador	168	3	4	0	161
YOY change	-10.2%	-82.4%	-73.3%	0.0%	3.9%
Nunavut	0	0	0	0	0
YOY change	0.0%	0.0%	0.0%	0.0%	0.0%
Yukon	51	0	1	50	0
YOY change	45.7%	0.0%	0.0%	42.9%	0.0%

YOY = year-over-year

Source: Statistics Canada, Frontier counts, custom tabulations

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

## 2019 Key Indicators

	Quarter 4	Year-to-date
Exchange Rate <sup>1</sup>	-4.9%	-4.8%
Air Capacity <sup>2</sup>	3.2%	7.4%
Consumer Confidence Index <sup>3</sup>	99.4	99.7

<sup>1</sup> Bank of Canada

<sup>2</sup> IATA - Diio SRS

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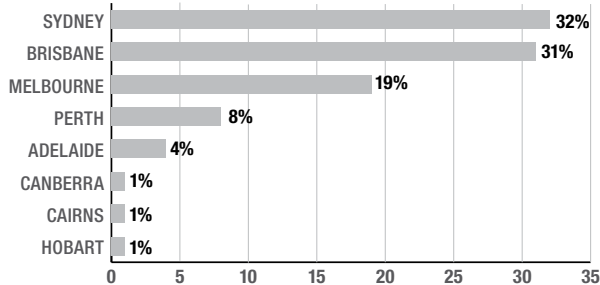
<sup>3</sup> OECD

Notes:

i. Air seat capacity is the variation in the total number of seats on direct commercial scheduled flights during the current quarter and YTD relative to the same periods in the previous year.

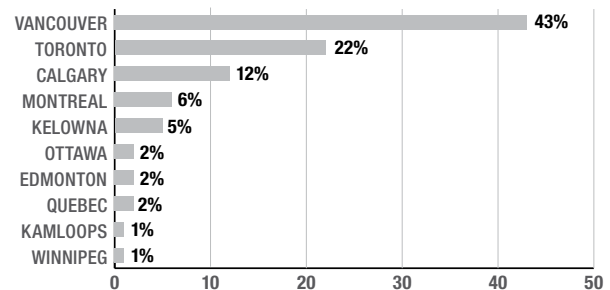
ii. The exchange rate variation is calculated on the average value of the Canadian Dollar during the current quarter and YTD relative to the same periods in the previous year.

## ✈️ Top Origin Cities - Q4 2019 (Air Travel)



Source: IATA, Global Agency Pro

## Top Destination Cities - Q4 2019 (Air Travel)



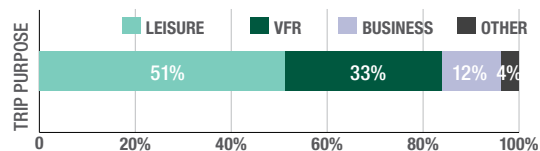
## 2019 Key Facts

Canada's market share of long-haul travel <sup>1</sup>	4.2%
Global outbound departures rank <sup>1*</sup>	#21
Global tourism expenditures rank <sup>2</sup>	#7

Source: <sup>1</sup> Oxford Economics

<sup>2</sup> UNWTO, World Tourism Barometer

\*Note: This metric denotes the ranking of Australia as a source of international tourists in the world.



	Total	Leisure	VFR	Business
Average trip length (days)	18.2	12.9	23.4	10.3
Average spend per day	\$117.0	\$191.8	\$67.0	\$194.8
Average trip spend	\$2,120.7	\$2,401.7	\$1,590.0	\$1,681.9

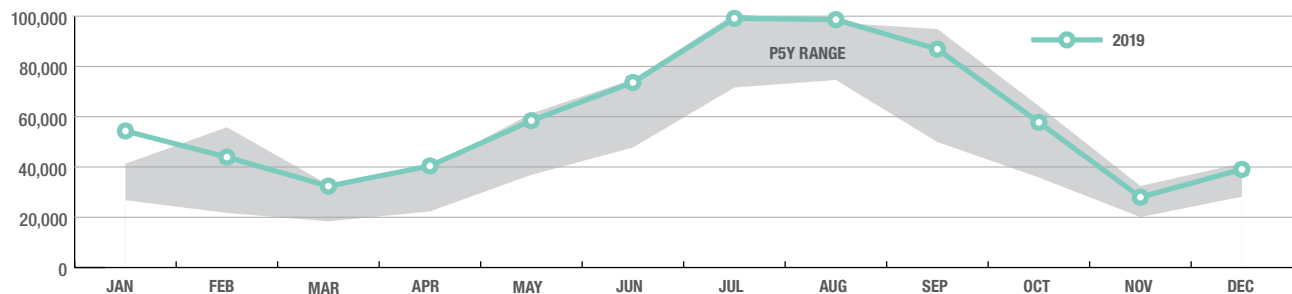
Source: Statistics Canada, Visitor Travel Survey

# CHINA

## Current Trends

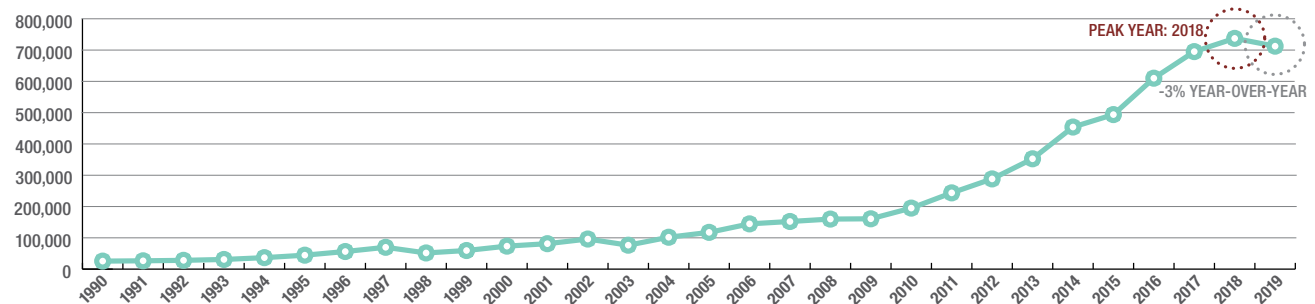
- Almost 125,000 visitors in Q4 2019 brought annual overnight arrivals from China to just over 712,000 in 2019, including 585,000 visitors who travelled to Canada by air or cruise (-9.1% year-over-year).
- Amid increased consumer uncertainties related to a slowing Chinese economy and global trade frictions, together with increased travel avoidance to the United States, air arrivals from China decreased year-over-year through all four quarters of 2019, both direct from overseas and via the US.
- This decline follows several years of strong growth in visitation from China, and despite the downturn, annual overnight arrivals from China were the second highest on record in 2019. China remains the second largest long-haul market for travel to Canada in 2019.
- Direct air capacity between China and Canada also contracted in 2019 (-2.9% year-over-year). Much of this decline came from a reduction in the total air capacity offered by Air Canada (-10.4%) and to a lesser extent Air China (-3.8%). These reductions in air capacity primarily affected services from Beijing (-8.8%) and Shanghai (-3.7%), and were partly offset by China Southern Airlines increasing its air capacity to Canada (+12.4%) from its hub in Guangzhou.

## Overnight Arrivals by Month: Past 5-Year Trend



Source: Statistics Canada, Frontier counts custom tabulations

## December Year-to-date Arrivals Long-Term Trend



Source: Statistics Canada, Frontier counts custom tabulations

## Overnight Arrivals by Mode

Overnight Arrivals	Q1	Year-over-year change	Q2	Year-over-year change	Q3	Year-over-year change	Q4	Year-over-year change
Total (all modes)	130,628	0.5%	172,463	-2.0%	284,580	-2.9%	124,803	-9.7%
✈️ Air direct from overseas	101,859	-1.6%	121,540	-5.7%	193,033	-13.2%	90,401	-5.9%
✈️ Air via US	13,198	-12.0%	15,760	-22.8%	22,960	-18.8%	12,113	-29.6%
🚗 Land	15,489	35.7%	30,649	33.6%	59,602	72.4%	21,708	-11.6%
🌊 Sea	82	0.0%	4,514	18.7%	8,985	11.6%	581	74.5%

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

# CHINA

## Overnight Arrivals by Province - Q4 2019

Overnight Arrivals	Total (all modes)	Air direct from overseas	Air via US	Land	Sea
Alberta	1,414	733	613	68	0
YOY* change	-49.2%	-63.8%	-15.6%	106.1%	0.0%
British Columbia	53,503	42,279	4,365	6,559	300
YOY change	-12.8%	-6.2%	-37.3%	-29.0%	132.6%
Saskatchewan	26	6	8	12	0
YOY change	-38.1%	-53.8%	-27.3%	-33.3%	0.0%
Manitoba	146	18	68	60	0
YOY change	-28.1%	-51.4%	-32.7%	-7.7%	0.0%
Ontario	59,766	39,920	5,744	14,099	3
YOY change	-1.2%	-1.3%	-20.6%	9.7%	0.0%
Quebec	9,613	7,436	1,255	891	31
YOY change	-25.4%	-12.8%	-40.1%	-60.5%	0.0%

Overnight Arrivals	Total (all modes)	Air direct from overseas	Air via US	Land	Sea
Nova Scotia	147	4	60	0	83
YOY change	-17.4%	-77.8%	-28.6%	0.0%	9.2%
New Brunswick	146	0	0	16	130
YOY change	-0.7%	0.0%	0.0%	-40.7%	8.3%
Newfoundland and Labrador	39	5	0	0	34
YOY change	225.0%	25.0%	0.0%	0.0%	325.0%
Nunavut	0	0	0	0	0
YOY change	0.0%	0.0%	0.0%	0.0%	0.0%
Yukon	3	0	0	3	0
YOY change	-94.2%	0.0%	0.0%	-94.2%	0.0%

YOY = year-over-year

Source: Statistics Canada, Frontier counts, custom tabulations

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

## 2019 Key Indicators

	Quarter 4	Year-to-date
Exchange Rate <sup>1</sup>	-2.0%	-2.0%
Air Capacity <sup>2</sup>	-7.5%	-2.9%
Consumer Confidence Index <sup>3</sup>	104.3	104.3

<sup>1</sup> Bank of Canada

<sup>2</sup> IATA - Diio SRS

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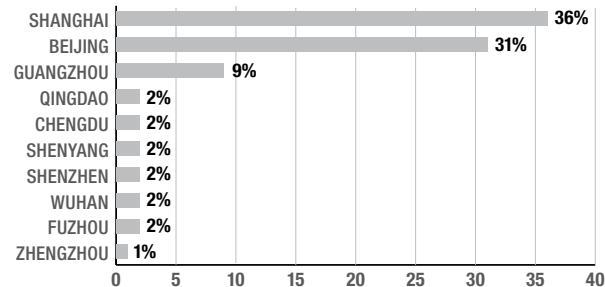
<sup>3</sup> OECD

Notes:

i. Air seat capacity is the variation in the total number of seats on direct commercial scheduled flights during the current quarter and YTD relative to the same periods in the previous year.

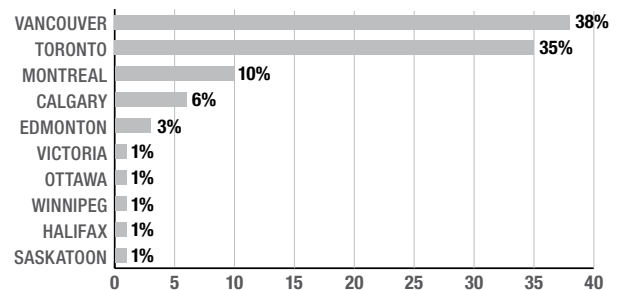
ii. The exchange rate variation is calculated on the average value of the Canadian Dollar during the current quarter and YTD relative to the same periods in the previous year.

## Top Origin Cities - Q4 2019 (Air Travel)



Source: IATA, Global Agency Pro

## Top Destination Cities - Q4 2019 (Air Travel)



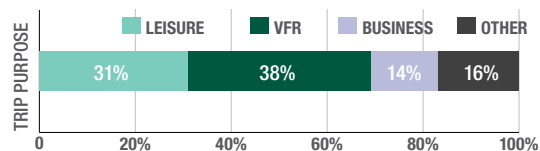
## 2019 Key Facts

Canada's market share of long-haul travel <sup>1</sup>	2.9%
Global outbound departures rank <sup>1*</sup>	#4
Global tourism expenditures rank <sup>2</sup>	#1

Source: <sup>1</sup> Oxford Economics

<sup>2</sup> UNWTO, World Tourism Barometer

\*Note: This metric denotes the ranking of China as a source of international tourists in the world.



	Total	Leisure	VFR	Business
Average trip length (days)	30.6	16.7	35.9	11.9
Average spend per day	\$89.1	\$169.5	\$58.6	\$176.3
Average trip spend	\$2,696.5	\$2,785.1	\$2,107.7	\$2,058.3

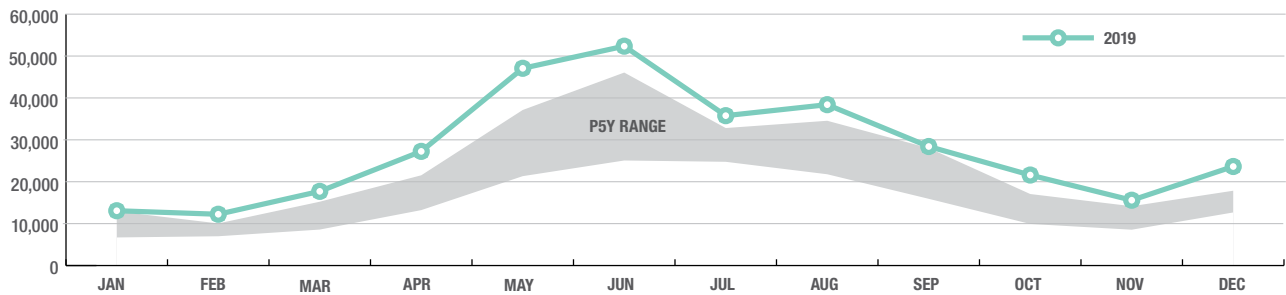
Source: Statistics Canada, Visitor Travel Survey

# INDIA

## Current Trends

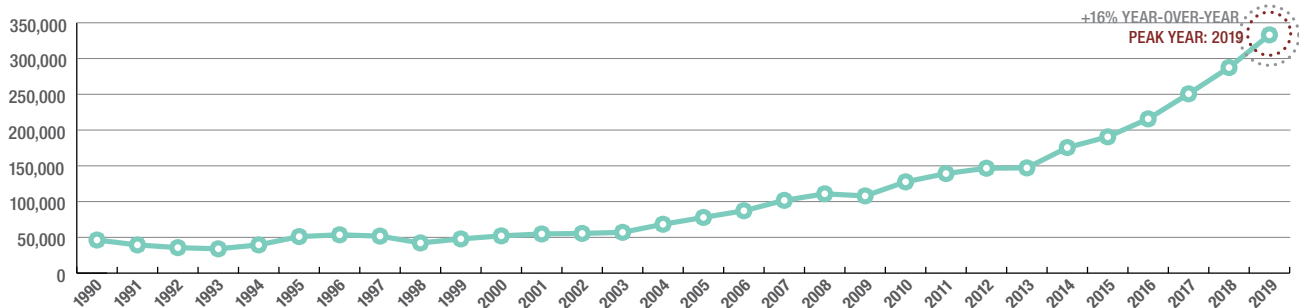
- Just under 61,000 visitors in Q4 2019 contributed to an annual total of 333,000 overnight arrivals from India in 2019, including nearly 286,000 who entered Canada by air or sea (+9.1% year-over-year).
- This strong growth continued the upward trend in annual overnight arrivals from India over the past few years, with 2019 monthly arrivals well ahead of the past-five-year range throughout the year and a particularly notable jump in the spring period of April to June 2019.
- Despite a steep reduction in direct air capacity between India and Canada (-26.3% year-over-year), air arrivals direct from overseas continued to grow in 2019 (+11.2%) and outpaced air arrivals via the US (+0.6%). The only decline in air arrivals from India was recorded in Q3 2019, when Air Canada service from Delhi and Mumbai to Toronto was suspended. This was followed by a recovery in Q4 2019, as Air India introduced a new non-stop service between Delhi and Toronto (in September 2019) and Air Canada resumed service on its Mumbai-Toronto route (in October 2019).

## Overnight Arrivals by Month: Past 5-Year Trend



Source: Statistics Canada, Frontier counts custom tabulations

## December Year-to-date Arrivals Long-Term Trend



Source: Statistics Canada, Frontier counts custom tabulations

## Overnight Arrivals by Mode

Overnight Arrivals	Q1	Year-over-year change	Q2	Year-over-year change	Q3	Year-over-year change	Q4	Year-over-year change
Total (all modes)	43,027	12.6%	126,678	21.0%	102,578	7.5%	60,828	23.9%
✈️ Air direct from overseas	33,820	7.2%	92,586	15.8%	65,260	-2.0%	46,196	29.4%
✈️ Air via US	4,331	10.9%	13,906	3.4%	12,646	-7.8%	6,706	6.2%
🚗 Land	4,848	79.4%	14,843	130.2%	19,640	111.4%	7,823	13.2%
🌊 Sea	28	-50.0%	5,343	9.7%	5,032	-12.9%	103	-34.8%

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

# INDIA

## Overnight Arrivals by Province - Q4 2019

Overnight Arrivals	Total (all modes)	✈️ Air direct from overseas	✈️ Air via US	🚗 Land	🌊 Sea
Alberta	1,249	870	310	69	0
YOY* change	-56.8%	-62.6%	-28.6%	-46.9%	0.0%
British Columbia	15,916	13,083	1,510	1,302	21
YOY change	30.6%	48.6%	22.7%	-36.6%	-77.2%
Saskatchewan	29	2	20	7	0
YOY change	-17.1%	0.0%	25.0%	-58.8%	0.0%
Manitoba	85	0	40	45	0
YOY change	-28.0%	-100.0%	-50.0%	25.0%	0.0%
Ontario	41,375	30,776	4,500	6,099	0
YOY change	30.6%	32.3%	12.4%	38.3%	0.0%
Quebec	2,071	1,455	302	274	40
YOY change	5.5%	21.9%	-39.4%	13.2%	37.9%
Nova Scotia	31	0	19	0	12
YOY change	-62.7%	-100.0%	-47.2%	0.0%	9.1%

Overnight Arrivals	Total (all modes)	✈️ Air direct from overseas	✈️ Air via US	🚗 Land	🌊 Sea
New Brunswick	44	0	0	18	26
YOY change	2.3%	0.0%	0.0%	0.0%	4.0%
Prince Edward Island	2	0	0	0	2
YOY change	0.0%	0.0%	0.0%	0.0%	0.0%
Newfoundland and Labrador	17	10	5	0	2
YOY change	-76.1%	-82.1%	-64.3%	0.0%	100.0%
Nunavut	0	0	0	0	0
YOY change	0.0%	0.0%	0.0%	0.0%	0.0%
Yukon	9	0	0	9	0
YOY change	12.5%	0.0%	0.0%	12.5%	0.0%

YOY = year-over-year

Source: Statistics Canada, Frontier counts, custom tabulations

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

## 2019 Key Indicators

	Quarter 4	Year-to-date
Exchange Rate <sup>1</sup>	1.0%	-0.7%
Air Capacity <sup>2</sup>	-7.0%	-26.3%

<sup>1</sup> Bank of Canada

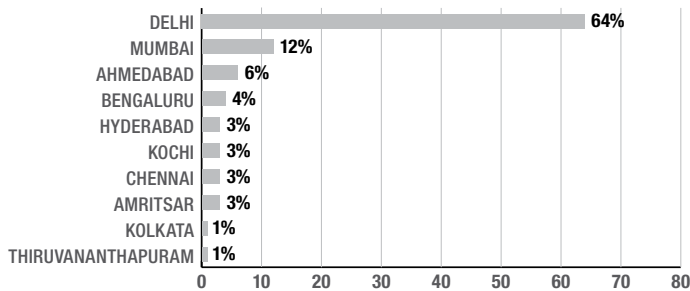
<sup>2</sup> IATA - Diiio SRS  
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Notes:

i. Air seat capacity is the variation in the total number of seats on direct commercial scheduled flights during the current quarter and YTD relative to the same periods in the previous year. For India, commercial scheduled flights with one stop are also included.

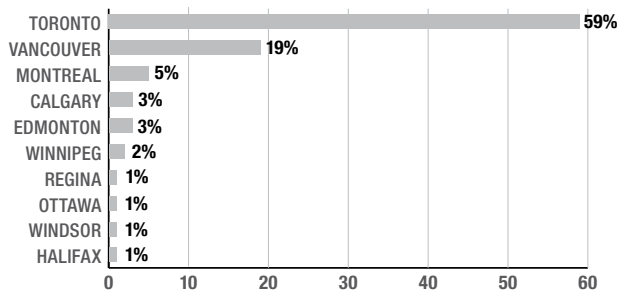
ii. The exchange rate variation is calculated on the average value of the Canadian Dollar during the current quarter and YTD relative to the same periods in the previous year.

## ✈️ Top Origin Cities - Q4 2019 (Air Travel)



Source: IATA, Global Agency Pro

## Top Destination Cities - Q4 2019 (Air Travel)



## 2019 Key Facts

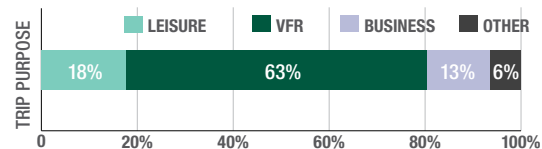
Canada's market share of long-haul travel <sup>1</sup>	2.4%
Global outbound departures rank <sup>1*</sup>	#19
Global tourism expenditures rank <sup>2</sup>	#14

Source: <sup>1</sup>Oxford Economics

<sup>2</sup> UNWTO, World Tourism Barometer

\*Note: This metric denotes the ranking of India as a source of international tourists in the world.

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	Total	Leisure	VFR	Business
Average trip length (days)	37.0	6.0	44.9	36.7
Average spend per day	\$36.3	\$430.3	\$12.0	\$119.0
Average trip spend	\$1,328.4	\$2,068.0	\$540.0	\$3,660.5

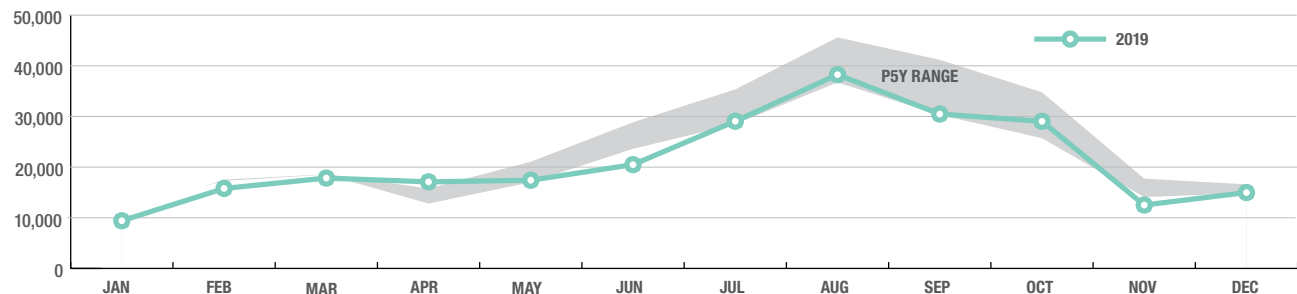
Source: Statistics Canada, Visitor Travel Survey

# JAPAN

## Current Trends

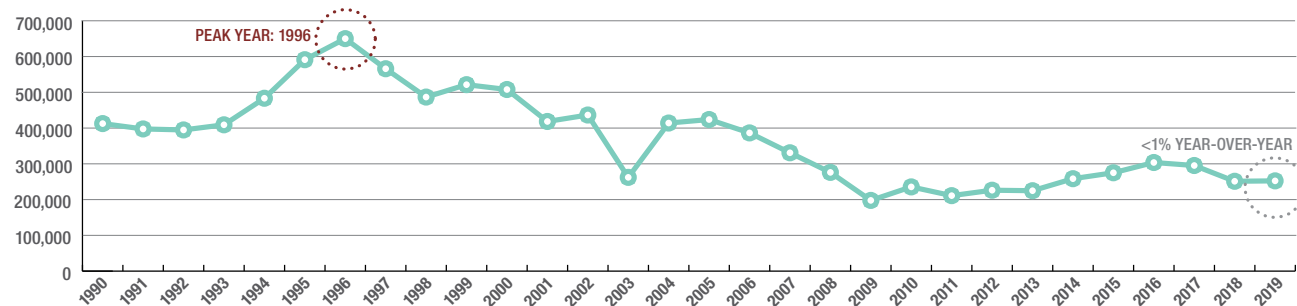
- With almost 57,000 visitors in Q4 2019, annual overnight arrivals from Japan reached just over 252,000 in 2019, including 223,000 who travelled to Canada by air or sea (-1.9% year-over-year).
- While the purchasing power of the Japanese yen strengthened against the Canadian dollar in 2019 (+3.7% year-over-year), Japanese travel prospects were constrained by subdued consumer confidence.
- Air arrivals in 2019 from Japan declined year-over-year both direct from overseas (-2.1%) and via the US (-4.6%), though direct air capacity between Japan and Canada was relatively on par with 2018 levels (+0.3% year-over-year).
- Compared with historical trends, 2019 monthly arrivals mostly fell towards the lower end of the past-five-year range, particularly from May onwards. Annual overnight arrivals from Japan have been relatively consistent since 2009, following several years of decline in the early 2000s.

## Overnight Arrivals by Month: Past 5-Year Trend



Source: Statistics Canada, Frontier counts custom tabulations

## December Year-to-date Arrivals Long-Term Trend



Source: Statistics Canada, Frontier counts custom tabulations

## Overnight Arrivals by Mode

Overnight Arrivals	Q1	Year-over-year change	Q2	Year-over-year change	Q3	Year-over-year change	Q4	Year-over-year change
Total (all modes)	43,042	-9.6%	55,000	2.9%	97,808	2.4%	56,537	3.4%
✈️ Air direct from overseas	30,399	-12.8%	35,835	0.6%	66,488	-3.6%	40,276	8.4%
✈️ Air via US	7,816	-12.5%	10,999	5.2%	15,662	-6.0%	9,449	-5.4%
🚗 Land	4,826	27.5%	5,997	12.4%	12,500	75.4%	5,589	-23.2%
🌊 Sea	1	0.0%	2,169	8.1%	3,158	14.0%	1,223	387.3%

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

# JAPAN

## Overnight Arrivals by Province - Q4 2019

Overnight Arrivals	Total (all modes)	✈️ Air direct from overseas	✈️ Air via US	🚗 Land	🌊 Sea
Alberta	2,148	1,408	655	85	0
YOY* change	23.4%	7.1%	57.1%	844.4%	0.0%
British Columbia	31,405	24,867	2,636	3,888	14
YOY change	10.0%	13.3%	-2.6%	0.8%	-53.3%
Saskatchewan	8	1	0	7	0
YOY change	-69.2%	0.0%	-100.0%	-61.1%	0.0%
Manitoba	153	1	90	62	0
YOY change	15.0%	0.0%	0.0%	47.6%	0.0%
Ontario	15,585	10,354	4,232	999	0
YOY change	-12.1%	0.6%	-10.8%	-62.9%	0.0%
Quebec	6,848	3,643	1,763	526	916
YOY change	11.3%	1.8%	-9.1%	-17.0%	0.0%

Overnight Arrivals	Total (all modes)	✈️ Air direct from overseas	✈️ Air via US	🚗 Land	🌊 Sea
Nova Scotia	169	1	72	0	96
YOY change	-7.1%	-88.9%	-8.9%	0.0%	2.1%
New Brunswick	201	0	1	19	181
YOY change	58.3%	0.0%	0.0%	375.0%	47.2%
Newfoundland and Labrador	17	1	0	0	16
YOY change	142.9%	0.0%	-100.0%	0.0%	300.0%
Nunavut	0	0	0	0	0
YOY change	0.0%	0.0%	0.0%	0.0%	0.0%
Yukon	3	0	0	3	0
YOY change	-82.4%	0.0%	0.0%	-82.4%	0.0%

YOY = year-over-year

Source: Statistics Canada, Frontier counts, custom tabulations

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

## 2019 Key Indicators

	Quarter 4	Year-to-date
Exchange Rate <sup>1</sup>	3.6%	3.7%
Air Capacity <sup>2</sup>	0.7%	0.3%
Consumer Confidence Index <sup>3</sup>	98.7	99.0

<sup>1</sup> Bank of Canada

<sup>2</sup> IATA - Diio SRS

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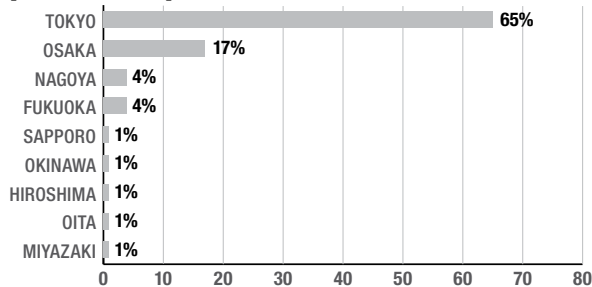
<sup>3</sup> OECD

Notes:

i. Air seat capacity is the variation in the total number of seats on direct commercial scheduled flights during the current quarter and YTD relative to the same periods in the previous year.

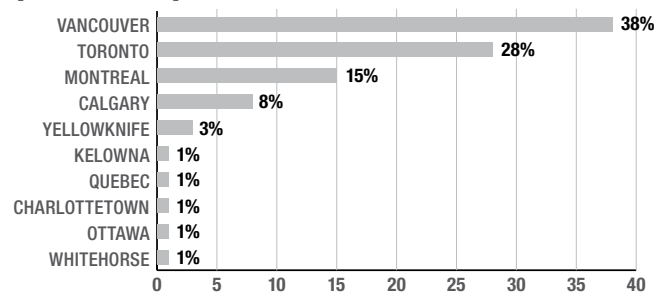
ii. The exchange rate variation is calculated on the average value of the Canadian Dollar during the current quarter and YTD relative to the same periods in the previous year.

## ✈️ Top Origin Cities - Q4 2019 (Air Travel)



Source: IATA, Global Agency Pro

## Top Destination Cities - Q4 2019 (Air Travel)



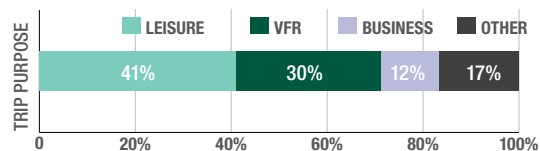
## 2019 Key Facts

Canada's market share of long-haul travel <sup>1</sup>	2.5%
Global outbound departures rank <sup>1*</sup>	#14
Global tourism expenditures rank <sup>2</sup>	#15

Source: <sup>1</sup> Oxford Economics

<sup>2</sup> UNWTO, World Tourism Barometer

\*Note: This metric denotes the ranking of Japan as a source of international tourists in the world.



	Total	Leisure	VFR	Business
Average trip length (days)	14.7	8.3	11.8	11.3
Average spend per day	\$139.1	\$326.2	\$108.3	\$168.5
Average trip spend	\$1,947.1	\$2,190.2	\$1,192.1	\$1,793.5

Source: Statistics Canada, Visitor Travel Survey

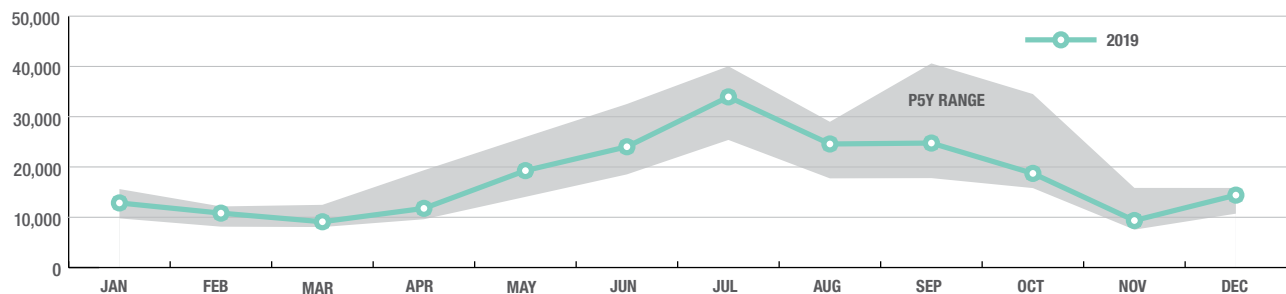


# SOUTH KOREA

## Current Trends

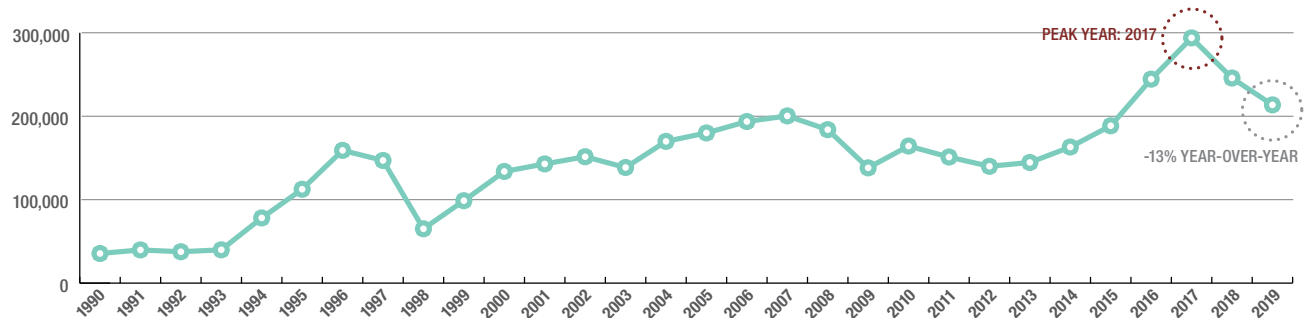
- Over 42,000 visitors in Q4 2019 brought annual overnight arrivals from South Korea up to almost 214,000 in 2019, including 169,000 who travelled to Canada by air or sea (+2.3%).
- This relatively subdued result comes in the midst of lower consumer confidence related to the uncertain economic prospects and ongoing trade disputes between the US and China on one side and Japan and South Korea on the other. There was also a year-over-year decrease in the purchasing power of the Korean Won in Canada in 2019 (-3.3%).
- Supported by expanded air capacity between South Korea and Canada (+2.3% year-over-year), air arrivals direct from overseas increased marginally in 2019 (+0.9%), particularly in the second half of the year. However, this growth was surpassed by increasing air arrivals via the US (+6.4%), which had previously seen a steep decline in 2018.
- Compared with historical trends, overnight arrivals fell short of the record peak achieved in 2017, but remained on par with the higher levels recorded over the past few years. Monthly arrivals typically fell within the past-five-year range in 2019.

## Overnight Arrivals by Month: Past 5-Year Trend



Source: Statistics Canada, Frontier counts custom tabulations

## December Year-to-date Arrivals Long-Term Trend



Source: Statistics Canada, Frontier counts custom tabulations

## Overnight Arrivals by Mode

Overnight Arrivals	Q1	Year-over-year change	Q2	Year-over-year change	Q3	Year-over-year change	Q4	Year-over-year change
Total (all modes)	32,776	-15.5%	55,066	-23.0%	83,271	-6.6%	42,475	-8.2%
✈️ Air direct from overseas	21,782	-0.0%	33,097	-3.3%	49,398	0.7%	27,744	7.6%
✈️ Air via US	5,467	7.1%	7,845	7.0%	11,342	6.2%	6,276	5.5%
🚗 Land	5,421	-54.4%	11,764	-57.6%	19,059	-27.5%	8,266	-42.9%
🌊 Sea	106	0.0%	2,360	10.3%	3,472	10.5%	189	225.9%

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

# SOUTH KOREA

## Overnight Arrivals by Province - Q4 2019

Overnight Arrivals	Total (all modes)	✈️ Air direct from overseas	✈️ Air via US	🚗 Land	🌊 Sea
Alberta	580	60	495	25	0
YOY* change	16.9%	-40.6%	33.4%	4.2%	0.0%
British Columbia	20,913	14,664	1,898	4,341	10
YOY change	-1.3%	2.9%	-1.8%	-13.0%	-44.4%
Saskatchewan	4	0	1	3	0
YOY change	-60.0%	-100.0%	-75.0%	-25.0%	0.0%
Manitoba	55	3	29	23	0
YOY change	41.0%	-40.0%	61.1%	43.8%	0.0%
Ontario	19,470	12,691	3,112	3,667	0
YOY change	-15.0%	14.3%	7.1%	-58.8%	0.0%
Quebec	1,223	321	707	187	8
YOY change	-22.3%	-3.9%	1.4%	-65.5%	0.0%

Overnight Arrivals	Total (all modes)	✈️ Air direct from overseas	✈️ Air via US	🚗 Land	🌊 Sea
Nova Scotia	158	4	33	0	121
YOY change	507.7%	0.0%	94.1%	0.0%	1244.4%
New Brunswick	59	0	0	16	43
YOY change	73.5%	0.0%	0.0%	33.3%	95.5%
Newfoundland and Labrador	9	1	1	0	7
YOY change	0.0%	0.0%	0.0%	0.0%	-22.2%
Nunavut	0	0	0	0	0
YOY change	0.0%	0.0%	0.0%	0.0%	0.0%
Yukon	4	0	0	4	0
YOY change	0.0%	0.0%	0.0%	0.0%	0.0%

YOY = year-over-year

Source: Statistics Canada, Frontier counts, custom tabulations

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

## 2019 Key Indicators

	Quarter 4	Year-to-date
Exchange Rate <sup>1</sup>	-4.2%	-3.3%
Air Capacity <sup>2</sup>	2.8%	2.3%
Consumer Confidence Index <sup>3</sup>	99.8	99.5

<sup>1</sup> Bank of Canada

<sup>2</sup> IATA - Diio SRS

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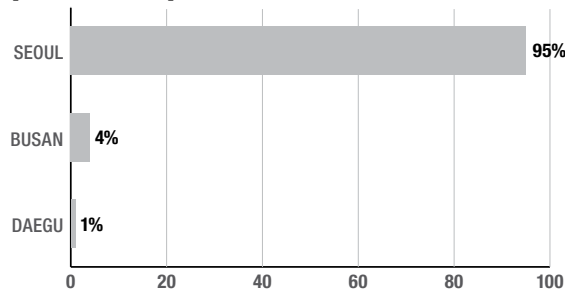
<sup>3</sup> OECD

Notes:

i. Air seat capacity is the variation in the total number of seats on direct commercial scheduled flights during the current quarter and YTD relative to the same periods in the previous year.

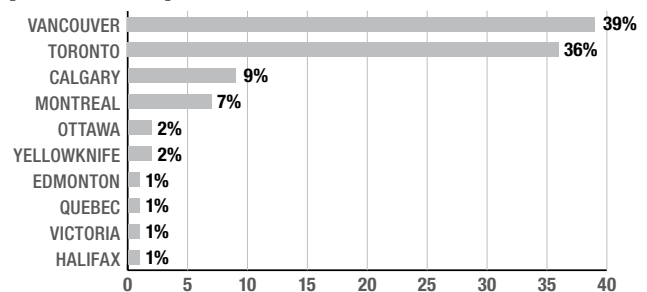
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## ✈️ Top Origin Cities - Q4 2019 (Air Travel)



Source: IATA, Global Agency Pro

## Top Destination Cities - Q4 2019 (Air Travel)



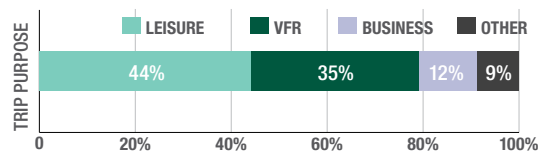
## 2019 Key Facts

Canada's market share of long-haul travel <sup>1</sup>	2.4%
Global outbound departures rank <sup>1*</sup>	#9
Global tourism expenditures rank <sup>2</sup>	#9

Source: <sup>1</sup> Oxford Economics

<sup>2</sup> UNWTO, World Tourism Barometer

\*Note: This metric denotes the ranking of South Korea as a source of international tourists in the world.



	Total	Leisure	VFR	Business
Average trip length (days)	13.1	6.6	16.4	3.7
Average spend per day	\$118.3	\$250.2	\$64.9	\$329.8
Average trip spend	\$1,505.4	\$1,642.5	\$1,077.0	\$1,085.0

Source: Statistics Canada, Visitor Travel Survey

# Accommodation

## Hotel Performance Indicators by Province

	Occupancy Rates				Average Daily Rate (ADR)				Revenue Per Available Room (RevPAR)			
	Dec. 2019	YOY <sup>^</sup> Change	Year-to-date	YOY <sup>^</sup> Change	Dec. 2019	YOY Change	Year-to-date	YOY Change	Dec. 2019	YOY Change	Year-to-date	YOY Change
Alberta <sup>1</sup>	39.6%	-2.7	54.1%	-1.8	\$119.86	-1.4%	\$129.29	-1.3%	\$47.45	-7.6%	\$70.00	-4.4%
British Columbia	56.3%	0.7	70.8%	0.0	\$183.59	1.6%	\$192.68	2.1%	\$103.33	2.9%	\$136.47	2.1%
Saskatchewan	43.2%	0.2	55.5%	-1.4	\$113.98	0.4%	\$118.73	0.7%	\$49.26	0.8%	\$65.93	-1.7%
Manitoba	52.3%	-2.0	67.4%	-1.5	\$117.72	-2.4%	\$125.01	-0.2%	\$61.55	-6.1%	\$84.30	-2.4%
Ontario	52.3%	-0.1	68.7%	-1.3	\$147.94	0.8%	\$163.04	0.6%	\$77.41	0.6%	\$112.08	-1.4%
Quebec	53.1%	-2.8	68.4%	-0.4	\$170.95	-0.4%	\$175.59	1.4%	\$90.86	-5.3%	\$120.08	0.8%
New Brunswick	38.1%	0.9	59.5%	-1.1	\$116.10	1.7%	\$128.50	2.5%	\$44.20	4.3%	\$76.51	0.6%
Nova Scotia	42.8%	0.6	66.3%	-0.2	\$122.68	-0.3%	\$145.63	-2.0%	\$52.50	1.2%	\$96.57	-2.4%
Newfoundland and Labrador	38.1%	3.4	55.6%	2.3	\$115.10	-3.0%	\$132.17	-5.8%	\$43.89	6.4%	\$73.46	-1.8%
Prince Edward Island	27.7%	-0.2	57.9%	0.6	\$110.89	3.5%	\$154.68	1.4%	\$30.67	2.7%	\$89.56	2.6%
Northwest Territories	67.4%	-1.0	63.4%	-7.4	\$145.87	0.2%	\$147.95	-0.7%	\$98.31	-1.2%	\$93.79	-11.1%
Yukon	42.1%	-1.8	63.0%	-1.7	\$126.43	10.0%	\$150.30	5.1%	\$53.19	5.4%	\$94.69	2.4%
<b>Canada</b>	<b>49.4%</b>	<b>-0.8</b>	<b>65.1%</b>	<b>-1.1</b>	<b>\$152.51</b>	<b>0.3%</b>	<b>\$163.52</b>	<b>0.8%</b>	<b>\$75.28</b>	<b>-1.2%</b>	<b>\$106.52</b>	<b>-0.8%</b>

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

<sup>^</sup> Percentage points.

<sup>1</sup> Excluding Alberta resorts.

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- The national average occupancy rate for 2019 was 65.1%, down 1.1 percentage points compared to the annual average in 2018. This slight downward trend was observed throughout most of the year and in most provinces and territories. By contrast, the 2019 average occupancy rate was slightly ahead of 2018 levels in Newfoundland and Labrador (55.6%, +2.3 P.P) and Prince Edward Island (57.9%, +0.6 P.P) and on par with 2018 in British Columbia (70.8%, no change). In 2019, the highest occupancy rates were recorded in British Columbia (70.8%), Ontario (68.7%) and Quebec (68.4%).
- The 2019 national average daily rate (ADR) was marginally ahead of 2018 levels, at \$163.52 (+0.8%). British Columbia (\$192.68), Quebec (\$175.59) and Ontario (\$163.04) reported the highest ADR for the year. Just over half of the provinces and territories reported year-over-year increases in the annual ADR in 2019, led by Yukon, New Brunswick and British Columbia.
- In 2019, the national revenue per available room (RevPar) fell marginally compared to 2018 levels (\$106.52, -0.8%). British Columbia (\$136.47), Quebec (\$120.08) and Ontario (\$112.08) reported the highest RevPar year-to-date. Just under half of the provinces and territories recorded year-over-year gains on this measure, led by Prince Edward Island, Yukon and British Columbia.
- Among Canada's three largest cities, the average occupancy rate grew slightly in downtown Montreal (+0.3%), and declined in both downtown Toronto (-0.8%) and downtown Vancouver (-0.2%). However, increases in ADR enabled both Montreal (+1.7%) and Vancouver (+3.2%) to post year-end gains in RevPar (+2.1 and +2.9%, respectively). Meanwhile, Alberta resorts posted the strongest gains nationwide for both ADR (+6.8%) and RevPar (+7.3%).

# Accommodation

## Hotel Performance Indicators by Property Type

	Occupancy Rates				Average Daily Rate (ADR)			
	Dec. 2019	YOY^ Change	Year-to-date	YOY^ Change	Dec. 2019	YOY Change	Year-to-date	YOY Change
<b>Property Size</b>								
Under 50 rooms	37.7%	-1.8	54.1%	0.3	\$117.50	-0.9%	\$122.43	1.0%
50-75 rooms	43.7%	-0.6	59.5%	-0.9	\$109.95	-1.3%	\$123.04	0.6%
76-125 rooms	46.7%	-1.0	63.2%	-1.3	\$123.87	-1.5%	\$135.70	0.5%
126-200 rooms	49.5%	-0.6	65.5%	-0.8	\$136.42	-0.3%	\$149.09	-0.1%
201-500 rooms	53.3%	-0.7	68.4%	-1.1	\$183.95	1.1%	\$194.14	1.1%
Over 500 rooms	58.5%	-0.8	73.1%	-1.7	\$235.55	2.9%	\$252.01	2.4%
<b>Total</b>	<b>49.4%</b>	<b>-0.8</b>	<b>65.1%</b>	<b>-1.1</b>	<b>\$152.51</b>	<b>0.3%</b>	<b>\$163.52</b>	<b>0.8%</b>
<b>Property Type</b>								
Limited Service	44.6%	-0.9	60.8%	-0.8	\$111.85	-1.4%	\$123.52	0.6%
Full Service	51.4%	-0.7	67.5%	-1.3	\$158.06	1.9%	\$177.90	1.0%
Suite Hotel	56.6%	-1.3	72.5%	-1.2	\$157.55	-1.9%	\$167.72	-0.5%
Resort	52.7%	0.0	63.0%	-0.1	\$335.41	3.2%	\$269.97	3.1%
<b>Total</b>	<b>49.4%</b>	<b>-0.8</b>	<b>65.1%</b>	<b>-1.1</b>	<b>\$152.51</b>	<b>0.3%</b>	<b>\$163.52</b>	<b>0.8%</b>
<b>Price Level</b>								
Budget	45.1%	0.3	60.2%	-0.5	\$98.72	-0.2%	\$110.21	1.3%
Mid-Price	48.6%	-1.2	65.2%	-1.3	\$137.28	0.3%	\$151.98	0.6%
Upscale	58.5%	0.2	71.0%	-0.5	\$264.72	1.6%	\$269.80	0.9%
<b>Total</b>	<b>49.4%</b>	<b>-0.8</b>	<b>65.1%</b>	<b>-1.1</b>	<b>\$152.51</b>	<b>0.3%</b>	<b>\$163.52</b>	<b>0.8%</b>

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

- In 2019, occupancy rates increased by property size, ranging from 54.1% for properties with under 50 rooms to 73.1% for properties with over 500 rooms. The year-over-year decline in the national average occupancy rate was recorded across all property sizes except for those with less than 50 rooms. The drop in the average occupancy rate in 2019 was also reported across all accommodation price levels and property types.
- ADR also increased by property size, ranging from \$122.43 for the smallest properties, with less than 50 rooms, to \$252.01 for the largest properties, with over 500 rooms. ADR increased year-over-year across all property sizes except mid-sized properties with 126-200 rooms, which fell marginally below 2018 levels (-0.1%). The biggest increase in ADR was reported for properties with over 500 rooms (+2.4%).
- By property type, resort properties continued to report the highest ADR in 2019 (\$269.97), as well as the biggest year-over-year increase (+3.1%) – at least three times the growth rate of any other property type. ADR also increased across all price levels, with budget accommodations recording the biggest year-over-year growth (+1.3%).