DESTINATION CANADA

Tourism Snapshot

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

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Canada

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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. Statistics Canada advises caution in using this data for comparison with previous months or years, as shifts in land ports arrivals may have impacted total arrivals for some markets.

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.

- With the start of the Easter holiday period moving from late March in 2018 to late April in 2019, total arrivals declined in March 2019 (-4.4%), resulting in a contraction over the first quarter of 2019 (-1.1%).
- Total arrivals over the first quarter of 2019 were the second highest on record following the peak achieved in 2018.
- In March 2019, overnight arrivals contracted as expected in several key markets, most notably the United States (-2.7%), the United Kingdom (-22.0%), Mexico (-16.7%) and Germany (-20.9%). The key travel period of Easter, which began in late March in 2018, fell later in April this year, resulting in a predictable slowdown from these markets, each of which showed a particularly strong Easter driven surge in March 2018. As a result of the Easter effect, arrivals from both March and April must be taken into account to assess short-term trends.
- While arrivals from the US by auto (-6.2%) and other non-air modes of travel (-29.4%) fell in March 2019, air arrivals from the US expanded for a third consecutive month (+6.5%, +5.1% YTD).
- Arrivals from China over the first quarter of 2019 stayed in positive territory (+0.5%), in spite of a slip in March 2019 (-1.5%). This slight decline was primarily driven by a double-digital contraction in air arrivals via the US (-20.1%), along with a more subdued decline in air arrivals direct from overseas (-0.4%). As suggested by air ticket records from IATA for March 2019, arrivals connected to the United States were heavily associated with passengers transiting through Canada on trips between the US and China. Consequently, a decline in traffic transiting through Canada resulted in fewer arrivals direct from overseas processed by custom officers, which was amplified through air arrivals via the US for travellers returning to China.
- India (+16.3%), France (+ 6.2%) and Australia (+2.7%) gained ground in March 2019, thanks to strong arrivals by air direct from overseas. Over the first quarter of 2019, all three markets expanded (India +12.6%, France +6.4%, and Australia +3.2%), adding to gains from Mexico (7.8%) and China (+0.5%), as well as US Air (+5.1%).

[1]Note the caveat from Statistics Canada associated with the March 2019 data, available here: https://www150.statcan.gc.ca/n1/daily-quotidien/190522/dq190522c-eng.htm.

QUICK LINKS

Industry Performance Dashboard

	March 2019	YTD
Overnight Arrivals[1]		
Total International	↓ 4.4%	↓ 1.1%
10 DC Markets*	↓ 4.1%	↓ 1.1%
United States	↓ 2.7%	↓ 0.8%
9 Long-Haul Markets	↓ 9.5%	↓ 1.9%
Non-DC Markets	↓ 6.4%	↓ 1.3%
Air Seat Capacity[2]		
Total International	↑ 4.7%	↑ 5.9%
10 DC Markets*	↑ 2.5%	↑ 4.7%
Non-DC Markets	↑ 9.0%	↑ 8.1%
National Hotel Indicators[3]		
Occupancy Rate**	↓ 1.3	↓ 0.5
Revenue Per Available Room (Revpar)	↓ 0.5%	↑ 1.0%
Average Daily Rate (ADR)	↓ 2.6%	↑ 0.1%

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]	
		Mar. 2019	YTD 2019	Mar. 2019	YTD 2019	Mar. 2019	YTD 2019	Mar. 2019 Average	YTD Average
DC North America	United States	803,668	2,023,482	-2.7%	-0.8%	3.8%	6.0%	3.4%	5.1%
	Mexico	28,010	79,158	-16.7%	7.8%	-3.7%	2.5%	0.1%	2.5%
DC Europe	France	27,848	90,804	6.2%	6.4%	2.9%	4.4%	-5.3%	-2.9%
	Germany	15,507	40,279	-20.9%	-13.7%	-4.7%	4.3%	-5.3%	-2.9%
	United Kingdom	35,504	96,773	-22.0%	-12.0%	-5.5%	-5.0%	-2.6%	-1.7%
DC Asia-Pacific	Australia	12,118	53,561	2.7%	3.2%	27.2%	13.4%	-5.7%	-4.8%
	China	32,382	130,627	-1.5%	0.5%	-0.3%	1.8%	-2.6%	-1.0%
	India	17,706	43,027	16.3%	12.6%	4.9%	5.7%	-3.2%	-4.0%
	Japan	17,850	43,054	-3.7%	-9.6%	4.4%	6.2%	-1.3%	3.2%
	South Korea	9,108	32,779	-30.7%	-15.5%	-6.7%	-7.2%	-2.2%	0.1%
Total 10 DC Markets		999,701	2,633,544	-4.1%	-1.1%				
Rest of the World		135,961	387,074	-6.4%	-1.3%				
Total International		1,135,662	3,020,618	-4.4%	-1.1%				

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 during the current month and YTD relative to the same periods in the previous year.

UNITED STATES

US Arrivals to Canada

CURRENT MONTH:

-2.7% ↓ YOY

YTD:

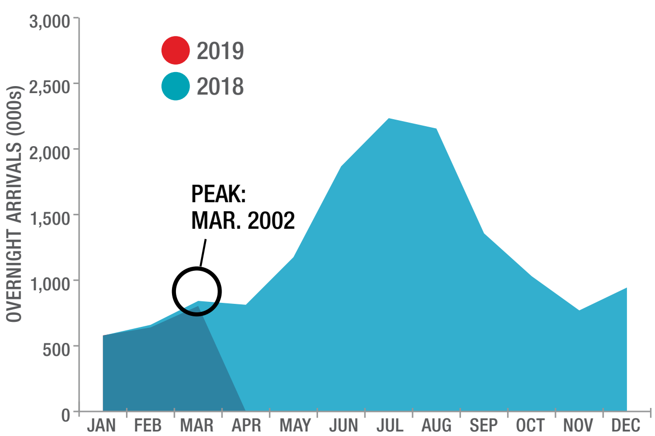
-0.8% ↓ YOY

Overnight Arrivals

	March 2019		YTD 2019	
	Arrivals	% YOY Variance	Arrivals	% YOY Variance
Automobile	440,447	-6.2	1,096,715	-2.0
Air	331,585	6.5	849,063	5.1
Other	31,636	-29.4	77,704	-31.7
US Total	**803,668**	**-2.7**	**2,023,482**	**-0.8**

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

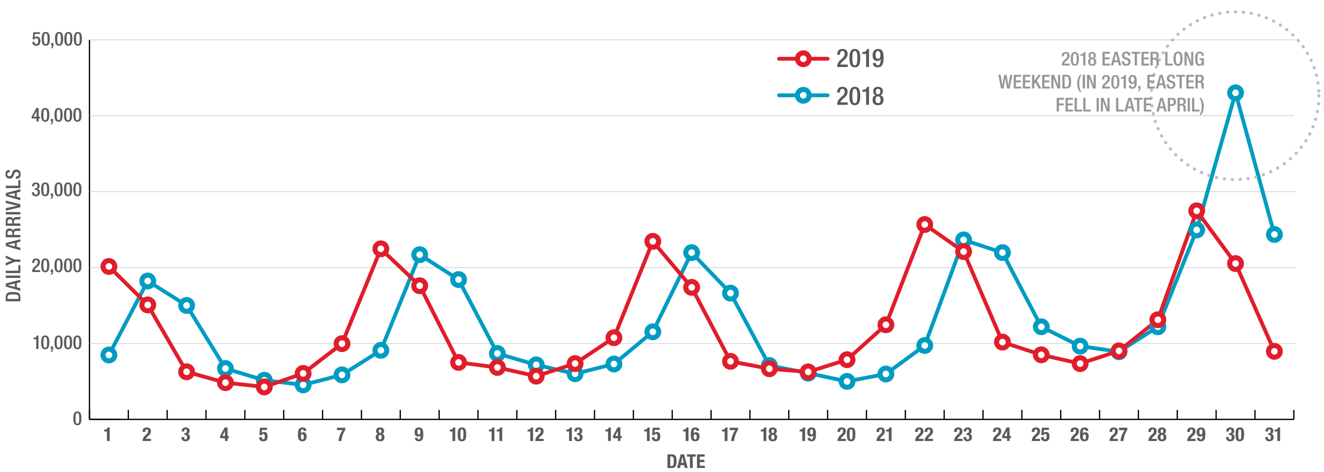
Air Seat Capacity[i]	March 2019	3.8%
	YTD	6.0%
Exchange Rate[ii]	March 2019	3.4%
	YTD	5.1%
Consumer Confidence Index (1985=100)[iii]	March 2019	124.2
	Previous Month	131.4
YTD Arrival Peak[iv]	Peak Year	2002
	Current % of Previous Peak	88.2%

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 804,000 visitors from the US in March 2019, down 2.7% compared to March 2018. This decline brought total US arrivals over the first quarter of 2019 to 2.02 million, marginally below the first quarter of 2018 (-0.8%).
- Much of the downward trend in March is attributable to a shift in the dates of the Easter long weekend, from late March in 2018 to late April in 2019. This is supported by daily auto arrivals data (IPIL), which shows a large spike over the Easter weekend. Taking into account the Easter effect, this leading indicator (IPIL) suggests that the March decline will likely be matched with an offsetting surge in April.
- The decline in March was seen across auto arrivals (-6.2%) and other modes of transport such as bus, train, and cruise (-29.4%). Meanwhile, air arrivals from the US increased for a third consecutive month (+6.5%), supported by expanded air capacity between Canada and the US (+3.8%) in March 2019. A similar trend was seen over the first quarter of 2019, with decreased US arrivals by auto (-2.0%) and other modes (-31.7%), but increased air arrivals (+5.1%).
    - 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 March and over the first quarter of 2019, the largest proportions of US overnight auto arrivals (based on IPIL arrival estimates) came from Washington (22.0% in March, 23.4% YTD), New York (17.1% in March, 19.6% YTD), and Michigan (13.2% in March, 12.3% YTD). Among those top three states of origin, the biggest decline in US auto arrivals was seen from New York (-13.7% in March, -3.8% YTD).
- The purchasing power of the USD in Canada gained strength in March 2019 (+3.4%), maintaining gains acquired over the past few months (+5.1% YTD).
- After a big jump in February 2019, the consumer confidence index published by the US Conference Board dropped back down 7.2 points to 124.2 in March 2019.

Daily US Overnight Auto Arrivals – March 2019



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

MEXICO

Mexico Arrivals to Canada

CURRENT MONTH:

-16.7% ↓ YOY

YTD:

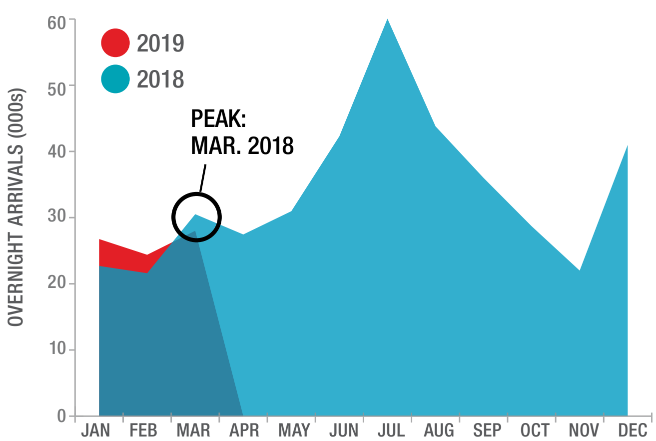
+7.8% ↑ YOY

Overnight Arrivals

	March 2019		YTD 2019	
	Arrivals	% YOY Variance	Arrivals	% YOY Variance
Mexico	28,010	-16.7	79,158	7.8

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]	March 2019	-3.7%
	YTD	2.5%
Exchange Rate[ii]	March 2019	0.1%
	YTD	2.5%
YTD Arrival Peak[iii]	Peak Year	2018
	Current % of Previous Peak	107.8%

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.

MEXICO

- After eight consecutive months of record arrivals from Mexico, March 2019 saw a decline compared to the same month last year (-16.7%). This sudden shift was attributable to the Easter effect, where travel over the Easter holiday weekend shifted from late March in 2018 to late April in 2019. Despite this year-over-year decline, with 28,000 visitors Mexico was Destination Canada's third largest long-haul market in March 2019 (after the UK and China).
- Over the first quarter of 2019, arrivals from Mexico reached a new record peak (79,000, +7.8%) and remained well ahead of the same period a year ago, continuing the long-term positive trend observed since the replacement of the visa requirement for Mexican citizens with the eTA in December 2016 year-to-date. Mexico is currently Destination Canada's fourth largest overseas market, after China, the UK, and France.
- The March decline in arrivals from Mexico came primarily from air arrivals, both direct from overseas (-18.8%) and via the US (-32.8%). At the same time, direct air capacity to Canada from Mexico City retracted slightly in March (-3.7%).
- The strength of the Mexican Peso in Canada in the first quarter of 2019 was ahead of the same period last year (+2.5% YTD) – a positive indicator for this market at the start of the year.

Mexico Arrivals by Port of Entry

- While air arrivals from Mexico were down in March, year-to-date over the first quarter of 2019 arrivals increased across all modes of entry.
- Over the first quarter of 2019, the main of ports of entry for direct air arrivals from Mexico were YVR (38.7% of direct air arrivals arrivals), YYZ (38.0%) and YUL (18.8%), with an additional 1.5% flying into YYC and 3.1% flying into other Canadian airports. The greatest year-over-year increase was registered outside of the four major hubs (+124.9% at other Canadian airports), and the greatest decrease at YYC (-65.2%).

Year-to-date Arrivals by Port of Entry

			Mexico
Air Arrivals from Overseas	YYZ	Arrivals	22,215
		YOY%	-1.4%
		% of Total	**28.1%**
	YVR	Arrivals	22,598
		YOY%	8.0%
		% of Total	**28.5%**
	YUL	Arrivals	10,960
		YOY%	4.2%
		% of Total	**13.8%**
	YYC	Arrivals	865
		YOY%	-65.2%
		% of Total	**1.1%**
	All other airports	Arrivals	1,788
		YOY%	124.9%
		% of Total	**2.3%**
	Subtotal	Arrivals	58,426
		YOY%	2.0%
		% of Total	**73.8%**
Air Arrivals via the US	All airports	Arrivals	12,564
		YOY%	5.5%
		% of Total	**15.9%**
Sea Arrivals	All sea borders	Arrivals	6
		YOY%	0.0%
		% of Total	**0.0%**
Land Arrivals via US	All land borders	Arrivals	8,162
		YOY%	91.2%
		% of Total	**10.3%**
Total Overnight Arrivals			**79,158**

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:

-13.7% ↓ YOY

YTD:

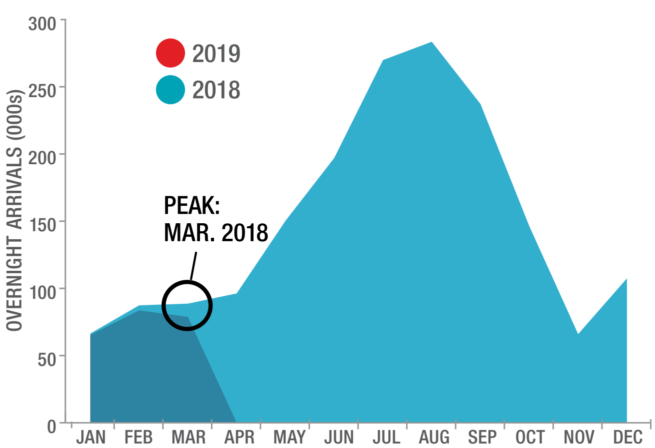
-5.8% ↓ YOY

Overnight Arrivals

	March 2019		YTD 2019	
	Arrivals	% YOY Variance	Arrivals	% YOY Variance
DC Europe	**78,859**	**-13.7**	**227,856**	**-5.8**
United Kingdom	35,504	-22.0	96,773	-12.0
France	27,848	6.2	90,804	6.4
Germany	15,507	-20.9	40,279	-13.7
Other Europe	**48,487**	**-9.7**	**138,750**	**-5.7**
Italy	4,847	-0.6	12,789	-4.0
Netherlands	5,204	5.5	14,399	-1.7
Spain	3,250	-22.9	9,040	-11.6
Switzerland	5,331	-10.3	16,193	8.5
Rest of Europe	29,855	-11.5	86,329	-8.2
Total Europe	**127,346**	**-12.2**	**366,606**	**-5.8**

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

Trend Plot: Total DC Europe Arrivals



DC Europe: Key Indicators

		France	Germany	United Kingdom
Air Seat Capacity[i]	Mar. 2019	2.9%	-4.7%	-5.5%
	YTD	4.4%	4.3%	-5.0%
Exchange Rate[ii]	Mar. 2019	-5.3%	-5.3%	-2.6%
	YTD	-2.9%	-2.9%	-1.7%
YTD Arrival Peak[iii]	Peak Year	2018	2018	2008
	Current % of Previous Peak	106.4%	86.3%	67.8%

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.

EUROPE

- In March 2019, arrivals from Destination Canada's Europe region reached nearly 79,000, down 13.7% compared to March 2018. This brought year-to-date arrivals over the first quarter of 2019 to 228,000, down 5.8% compared to the same period last year.
- The decline from this region came from the UK (-22.0% in March, -12.0% YTD) and Germany (-20.9% in March, -13.7% YTD). While both markets have been trending downward for several months, March travel from both the UK and Germany was also likely impacted by the shift in the Easter holiday dates from from late March in 2018 to late April in 2019, as both markets saw a particularly strong Easter driven surge in March 2018.
- Despite the sharp downturn in March arrivals, the UK remained Destination Canada's largest long-haul market in March 2019. However, it was second to China in total arrivals over the first quarter of 2019.
- Meanwhile, France continued to lead Destination Canada's Europe region as the only market to see increased arrivals, with close to 28,000 visitors in March 2019 (+6.2%), bringing first quarter arrivals in 2019 to nearly 91,000 (+6.4%). This performance represented new arrivals records for both the month of March and the first quarter of the year.
- In March 2019, expanded air capacity between France and Canada (+2.9%) supported increased direct air arrivals (+28.2%), while lower seat availability from the UK (-5.5%) and Germany (-4.7%) aligned with fewer direct air arrivals from both markets (-30.1% from the UK, -21.8% from Germany).
- Over the first quarter of 2019, the purchasing power of both the Euro (-2.9%) and British pound (-1.7%) relative to the Canadian dollar fell below the same period in 2018.

DC Europe Arrivals by Port of Entry

- The declining arrivals performance from Destination Canada's Europe region over the first quarter of 2019 was largely attributable to fewer air arrivals, both direct from overseas (-14.1%) and via the US (-29.5%).

Year-to-date Arrivals by Port of Entry

			France	Germany	UK
Air Arrivals from Overseas	YYZ	Arrivals	8,304	12,949	33,359
		YOY%	-22.8%	-26.6%	-17.0%
		% of Total	**9.1%**	**32.1%**	**34.5%**
	YVR	Arrivals	2,569	6,642	20,072
		YOY%	16.3%	-2.9%	-17.6%
		% of Total	**2.8%**	**16.5%**	**20.7%**
	YUL	Arrivals	59,578	6,383	8,209
		YOY%	41.8%	7.1%	-9.0%
		% of Total	**65.6%**	**15.8%**	**8.5%**
	YYC	Arrivals	558	4,118	9,841
		YOY%	-4.1%	-2.4%	-28.1%
		% of Total	**0.6%**	**10.2%**	**10.2%**
	All other airports	Arrivals	2,199	742	2,796
		YOY%	30.7%	-17.4%	-19.0%
		% of Total	**2.4%**	**1.8%**	**2.9%**
	Subtotal	Arrivals	73,208	30,834	74,277
		YOY%	27.9%	-13.3%	-18.1%
		% of Total	**80.6%**	**76.6%**	**76.8%**
Air Arrivals via the US	All airports	Arrivals	11,474	6,598	12,486
		YOY%	-52.1%	-13.4%	-12.2%
		% of Total	**12.6%**	**16.4%**	**12.9%**
Sea Arrivals	All sea borders	Arrivals	4	6	46
		YOY%	-80.0%	0.0%	228.6%
		% of Total	**0.0%**	**0.0%**	**0.0%**
Land Arrivals via US	All land borders	Arrivals	6,118	2,841	9,964
		YOY%	48.1%	-18.6%	99.1%
		% of Total	**6.7%**	**7.1%**	**10.3%**
Total Overnight Arrivals			**90,804**	**40,279**	**96,773**

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:

-2.7% ↓ YOY

YTD:

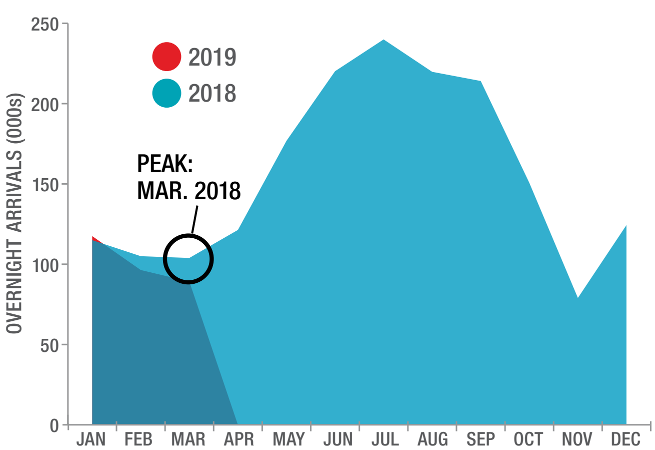
-1.1% ↓ YOY

Overnight Arrivals

	March 2019		YTD 2019	
	Arrivals	% YOY Variance	Arrivals	% YOY Variance
DC Asia-Pacific	**89,164**	**-2.7**	**303,048**	**-1.1**
Australia	12,118	2.7	53,561	3.2
China	32,382	-1.5	130,627	0.5
India	17,706	16.3	43,027	12.6
Japan	17,850	-3.7	43,054	-9.6
South Korea	9,108	-30.7	32,779	-15.5
Other Asia-Pacific	**46,305**	**-4.7**	**130,842**	**4.5**
Hong Kong	7,945	-21.2	26,639	-2.5
Taiwan	6,595	-21.9	21,691	-2.8
Rest of Asia-Pacific	31,765	5.6	82,512	9.1
Total Asia-Pacific	**135,469**	**-3.4**	**433,890**	**0.5**

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

Trend Plot: Total DC Asia-Pacific Arrivals



Asia-Pacific: Key Indicators

		Australia	China	India	Japan	South Korea
Air Seat Capacity[i]	Mar. 2019	27.2%	-0.3%	4.9%	4.4%	-6.7%
	YTD	13.4%	1.8%	5.7%	6.2%	-7.2%
Exchange Rate[ii]	Mar. 2019	-5.7%	-2.6%	-3.2%	-1.3%	-2.2%
	YTD	-4.8%	-1.0%	-4.0%	3.2%	0.1%
YTD Arrival Peak[iii]	Peak Year	2017	2018	2018	1997	2017
	Current % of Previous Peak	101.5%	100.5%	112.6%	45.7%	81.5%

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.

- Canada welcomed just over 89,000 visitors from Destination Canada's Asia-Pacific region in March 2019, slightly below the same month a year ago (-2.7%). This brought total arrivals for the first quarter of 2019 to 303,000 (-1.1%).

- Arrivals from China, which made up 43% of the arrivals from Destination Canada's Asia-Pacific region over the first quarter of 2019, fell 1.5% year-over-year in March 2019 but remained marginally ahead of last year YTD (+0.5%). Air ticket data suggests that this slight downward trend may be associated with fewer Chinese travellers transiting through Canada on trips between the US and China. Despite this slowdown, China regained its top spot as Destination Canada's largest long-haul market in the first quarter of 2019, with almost 131,000 visitors between January and March.

- Together with the continuing decline from Japan (-3.7%) and South Korea (-30.7%), this downward shift from China in March 2019 outweighed a positive performance from Australia (12,000 visitors, +2.7%) and record monthly arrivals from India (18,000 visitors, +16.3%).

- Over the first quarter of 2019, arrivals from China (131,000, +0.5%), India (43,000, +12.6%), and Australia (54,000, +3.2%) remained ahead of 2018 levels, while the slight year-over-year decline from the region over this period was due to the continued downward trend in arrivals from Japan (43,000, -9.6%) and South Korea (33,000, -15.5%).

- Direct air capacity to Canada from four of Destination Canada's five Asia-Pacific markets increased over the first quarter of 2019. This was led by Australia (+13.4%), as Air Canada increased the frequency of its Melbourne-Vancouver flight. Only South Korea saw a retraction (-7.2%), as Air Canada reduced capacity on its Seoul-Toronto route.

DC Asia-Pacific Arrivals by Port of Entry

- The decline in arrivals from South Korea was attributable to a large year-over-year drop in arrivals by land via the US. Excluding those land arrivals, air and sea arrivals from Korea edged up slightly over the first quarter of 2019 (+1.7%).
  - It is important to note that Statistics Canada advices caution in interpreting land port arrival levels, as these figures may have been impacted by changes in data collection processes initiated in August 2018.

Year-to-date Arrivals by Port of Entry

			Australia	China	India	Japan	South Korea
Air Arrivals from Overseas	YYZ	Arrivals	2,347	41,981	19,231	6,944	8,699
		YOY%	-8.5%	-1.8%	3.4%	-39.3%	-10.2%
		% of Total	**4.4%**	**32.1%**	**44.7%**	**16.1%**	**26.5%**
	YVR	Arrivals	24,547	51,270	11,414	22,311	12,704
		YOY%	10.1%	-1.3%	21.3%	1.9%	7.6%
		% of Total	**45.8%**	**39.2%**	**26.5%**	**51.8%**	**38.8%**
	YUL	Arrivals	380	6,855	1,405	1,046	235
		YOY%	5.0%	1.9%	-15.5%	710.9%	25.0%
		% of Total	**0.7%**	**5.2%**	**3.3%**	**2.4%**	**0.7%**
	YYC	Arrivals	389	1,596	1,405	74	103
		YOY%	31.0%	-15.9%	-12.4%	-94.7%	68.9%
		% of Total	**0.7%**	**1.2%**	**3.3%**	**0.2%**	**0.3%**
	All other airports	Arrivals	204	157	365	24	44
		YOY%	124.2%	-22.3%	31.8%	-4.0%	29.4%
		% of Total	**0.4%**	**0.1%**	**0.8%**	**0.1%**	**0.1%**
	Subtotal	Arrivals	27,867	101,859	33,820	30,399	21,785
		YOY%	8.8%	-1.6%	7.2%	-12.8%	-0.0%
		% of Total	**52.0%**	**78.0%**	**78.6%**	**70.6%**	**66.5%**
Air Arrivals via the US	All airports	Arrivals	20,560	13,197	4,331	7,827	5,467
		YOY%	-6.0%	-12.0%	10.9%	-12.4%	7.1%
		% of Total	**38.4%**	**10.1%**	**10.1%**	**18.2%**	**16.7%**
Sea Arrivals	All sea borders	Arrivals	3	82	28	1	106
		YOY%	0.0%	0.0%	-50.0%	0.0%	0.0%
		% of Total	**0.0%**	**0.1%**	**0.1%**	**0.0%**	**0.3%**
Land Arrivals via US	All land borders	Arrivals	5,131	15,489	4,848	4,827	5,421
		YOY%	15.6%	35.7%	79.4%	27.5%	-54.4%
		% of Total	**9.6%**	**11.9%**	**11.3%**	**11.2%**	**16.5%**
Total Overnight Arrivals			**53,561**	**130,627**	**43,027**	**43,054**	**32,779**

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

	March 2019	YOY % Variance	Jan. - Mar. 2019	YOY^ % Variance
United States	2,016,984	-2.2	4,799,177	-5.4
Other Countries	1,447,093	4.3	3,932,893	4.3
Total Trips from Canada	3,464,077	0.4	8,732,070	-1.2

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

- Canadians took 3.5 million international trips in March 2019, just marginally ahead of the same month a year ago (+0.4%). Increased trips to overseas international destinations (1.4 million trips, +4.3%) outpaced a slight decline in trips to the US (2.0 million trips, -2.2%) in March 2019.
- The decline in Canadian travel to the US in March 2019 was seen across all modes of transportation: by automobile (-0.8%), by air (-2.7%), and particularly by other modes of transportation, such as bus, train, or cruise (-21.7%).
- Over the first quarter of 2019, Canadians travelled internationally slightly less than they did over the same period in 2018 (8.7 million trips, -1.2%). This decline was due primarily to a decrease in travel to the US (4.8 million trips, -5.4%), which outweighed an increase in Canadian travel to other international destinations (3.9 million trips, +4.3%).
    - 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 Edwad Island	Nova Scotia	New Brunswick	Québec	Ontario
Total One or more nights	2019	3,776	13	9,379	16,667	509,756	1,327,123
	Variance YOY%	-23.5%	-13.3%	6.7%	-1.7%	3.7%	-4.9%
	Change YOY	-1,160	-2	586	-295	18,207	-68,975
US Residents by Automobile	2019	0	0	0	15,476	175,622	496,701
	Variance YOY%	0.0%	0.0%	0.0%	-2.2%	-2.3%	-4.1%
	Change YOY	-	-	-	-351	-4,166	-21,471
US Residents by Non-Automobile	2019	247	2	5,182	588	153,192	402,240
	Variance YOY%	-62.3%	-50.0%	-0.3%	-37.1%	7.7%	-7.1%
	Change YOY	-409	-2	-15	-347	10,930	-30,709
Residents from Other Countries	2019	3,529	11	4,197	603	180,942	428,182
	Variance YOY%	-17.5%	0.0%	16.7%	201.5%	6.8%	-3.8%
	Change YOY	-751	0	601	403	11,443	-16,795

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	39,033	9,854	154,754	944,999	5,138	126	**3,020,618**
	Variance YOY%	12.1%	10.6%	1.4%	1.2%	-5.7%	17.8%	**-1.1%**
	Change YOY	4,220	946	2,184	10,913	-312	19	**-33,669**
US Residents by Automobile	2019	23,143	6,727	11,830	362,373	4,843	0	**1,096,715**
	Variance YOY%	-1.0%	16.2%	4.2%	0.9%	-6.7%	0.0%	**-2.0%**
	Change YOY	-239	940	480	3,341	-347	-	**-21,813**
US Residents by Non-Automobile	2019	13,473	2,705	98,614	250,475	43	6	**926,767**
	Variance YOY%	32.2%	2.4%	8.1%	6.4%	-45.6%	-62.5%	**0.6%**
	Change YOY	3,280	63	7,430	15,085	-36	-10	**5,260**
Residents from Other Countries	2019	2,417	422	44,310	332,151	252	120	**997,136**
	Variance YOY%	95.2%	-11.9%	-11.4%	-2.2%	39.2%	31.9%	**-1.7%**
	Change YOY	1,179	-57	-5,726	-7,513	71	29	**-17,116**

- Over the first quarter of 2019, most international visitors to Canada crossed the border in Ontario (43.9%), British Columbia (31.3%), Quebec (16.9%), and Alberta (5.1%).
- The 1.1% decrease in total international arrivals in Q1 2019 came almost entirely through Ontario (-4.9%, 69,000 fewer arrivals), with fewer US auto (-4.1%) and non-auto (-7.1%) arrivals, and fewer arrivals from overseas countries (-3.8%).
- Going against the overall trend, notable increases were seen in arrivals to Quebec (+3.7%, 18,000 additional arrivals), British Columbia (+1.2%, 11,000 additional arrivals), Manitoba (+12.1%, 4,000 additional arrivals), and Alberta (+1.4%, 2,000 additional arrivals).

ACCOMMODATION

Hotel Performance Indicators by Province

	Occupancy Rates				Average Daily Rate (ADR)				Revenue Per Available Room (RevPAR)			
	Mar. 2019	YOY^ Variance	Jan.-Mar.	YOY^ Variance	Mar. 2019	YOY % Variance	Jan.-Mar.	YOY % Variance	Mar. 2019	YOY % Variance	Jan.-Mar.	YOY % Variance
Alberta[1]	53.6%	-0.3	50.0%	0.4	$125.72	-1.9%	$125.88	-0.9%	$67.44	-2.5%	$62.93	-0.2%
British Columbia	67.5%	-0.9	62.9%	0.4	$166.46	-0.6%	$170.93	2.0%	$112.34	-1.9%	$107.47	2.6%
Saskatchewan	53.9%	-2.4	50.6%	-0.4	$117.92	-2.0%	$116.70	-0.8%	$63.56	-6.1%	$59.08	-1.5%
Manitoba	68.8%	1.9	63.3%	1.1	$124.96	0.3%	$124.60	0.9%	$86.00	3.2%	$78.87	2.7%
Ontario	61.9%	-2.1	58.8%	-1.3	$152.41	0.6%	$150.10	1.9%	$94.39	-2.7%	$88.21	-0.3%
Quebec	59.4%	-2.2	57.8%	-1.6	$152.96	0.3%	$155.86	1.7%	$90.88	-3.2%	$90.05	-1.0%
New Brunswick	51.6%	0.5	46.0%	-1.0	$118.32	0.9%	$117.96	1.6%	$61.03	1.9%	$54.31	-0.4%
Nova Scotia	61.2%	-2.9	51.7%	0.1	$128.23	-1.4%	$125.22	-0.6%	$78.51	-5.8%	$64.78	-0.5%
Newfoundland	46.1%	3.7	39.3%	-0.3	$121.41	-7.8%	$121.40	-7.8%	$56.02	0.2%	$47.76	-8.4%
Prince Edward Island	40.1%	8.2	39.8%	2.2	$111.51	4.7%	$114.11	2.4%	$44.74	31.5%	$45.40	8.3%
Northwest Territories	73.5%	-15.3	73.0%	-10.5	$148.59	-5.4%	$149.48	-3.1%	$109.25	-21.7%	$109.05	-15.3%
Yukon	56.6%	-1.0	53.8%	0.8	$129.72	1.8%	$129.11	4.9%	$73.41	0.1%	$69.48	6.4%
Canada	**60.3%**	**-1.3**	**56.6%**	**-0.5**	**$147.75**	**-0.5%**	**$148.21**	**1.0%**	**$89.08**	**-2.6%**	**$83.90**	**0.1%**

Note: Based on the operating results of 237,545 rooms (unweighted data).
^ Percentage points.
[1] Excluding Alberta resorts.

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- In March 2019 the national average occupancy rate fell slightly compared to the same month a year ago (60.3%, down 1.3 percentage points), bringing the year-to-date rate for the first quarter of 2019 to 56.6%, a marginal -0.5 percentage points below the same period in 2018.
- Both in March and over Q1 2019, the highest occupancy rates were recorded in the Northwest Territories, Manitoba, and British Columbia.
- The national average daily rate (ADR) slipped slightly in March 2019 ($147.75, -0.5%), bringing the ADR for the first quarter of 2019 just ahead of 2018 levels ($148.21, +1.0%). Both in March and over Q1 2019, the highest ADR was recorded in British Columbia, followed by Quebec and Ontario.
- The national revenue per available room (RevPar) also fell in March 2019 ($89.08, -2.6%), bringing the Q1 average approximately on par with 2018 ($83.90, +0.1%). The top performing provinces/territories included British Columbia, the Northwest Territories, Ontario, and Quebec.
- While the Northwest Territories was a strong performer across all metrics, it also recorded some steep declines compared to 2018. At the same time, Prince Edward Island recorded some of the strongest year-over-year growth despite some lower rates.

ACCOMMODATION

Hotel Performance Indicators by Property Type

	Occupancy Rates				Average Daily Rate (ADR)			
	Mar. 2019	YOY^ Change	Jan.- Mar.	YOY^ Variance	Mar. 2019	YOY Variance	Jan.- Mar.	YOY Variance
Property Size								
Under 50 rooms	47.1%	1.6	44.2%	1.8	$110.65	2.4%	$111.04	3.6%
50-75 rooms	54.4%	0.5	50.4%	-0.0	$110.75	-0.3%	$110.41	0.3%
76-125 rooms	59.1%	-1.2	55.1%	-0.6	$125.66	0.3%	$125.74	1.1%
126-200 rooms	60.9%	-1.6	57.0%	-0.4	$136.85	0.1%	$136.73	1.3%
201-500 rooms	63.4%	-1.8	60.6%	-0.5	$174.45	-0.9%	$177.24	1.1%
Over 500 rooms	66.8%	-3.6	62.4%	-2.6	$218.02	0.2%	$212.79	2.4%
Total	**60.3%**	**-1.3**	**56.6%**	**-0.5**	**$147.75**	**-0.5%**	**$148.21**	**1.0%**
Property Type								
Limited Service	56.4%	-0.1	52.5%	0.1	$115.41	0.7%	$115.07	1.5%
Full Service	61.7%	-2.1	58.2%	-1.0	$158.30	0.1%	$156.76	1.5%
Suite Hotel	68.4%	-2.1	65.2%	-0.5	$151.35	-3.6%	$152.42	-1.3%
Resort	63.3%	0.1	59.5%	0.3	$234.79	-0.8%	$253.93	2.5%
Total	**60.3%**	**-1.3**	**56.6%**	**-0.5**	**$147.75**	**-0.5%**	**$148.21**	**1.0%**
Price Level								
Budget	54.7%	0.5	51.2%	0.9	$101.56	2.1%	$101.67	3.0%
Mid-Price	60.8%	-1.7	56.8%	-0.9	$138.30	0.1%	$137.64	1.0%
Upscale	65.2%	-1.9	62.3%	-1.0	$238.17	-1.8%	$240.33	0.7%
Total	**60.3%**	**-1.3**	**56.6%**	**-0.5**	**$147.75**	**-0.5%**	**$148.21**	**1.0%**

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

- Over the first quarter of 2019, occupancy rates generally increased by property size, though only smaller properties recorded improved performance compared to 2018.
- A similar trend was observed with ADR increasing by size for properties of 50 rooms and up; however, properties with <50 rooms reported a higher ADR than slightly bigger properties of 50-70 rooms. Those smallest properties also reported the strongest year-over-year growth.
- Over the first quarter of 2019, suite hotels reported the highest occupancy rates, while resorts had the highest ADR. Full service properties also reported a higher ADR than suite hotels. Both metrics also increased by price level, though again, the cheaper budget hotels showed more improvement over 2018 levels than more expensive properties.