

Tourism Snapshot

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

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KEY HIGHLIGHTS

- In April 2016, Canada greeted nearly 1,004,000 overnight visitors from DC's 11 international markets. This is up 10.6% relative to 2015 and represents the highest level of overnight arrivals since 2002. During the four months of 2016, overnight arrivals from DC's 11 international markets rose 15.5% to 3.42 million visitors.
- In April 2016, overnight arrivals from DC's 11 international markets recorded gains from all four world regions, including Asia-Pacific (+15.7%), Latin America (+12.6%), the US (+11.0%) and Europe (+1.5%).
- From January to April 2016, arrivals growth occurred from all DC regions with the US leading the way (+17.1%), followed by Latin America (+16.5%), Asia-Pacific (+11.4%) and Europe (+6.2%).
- Overnight arrivals from the United States registered double-digit growth for the sixth consecutive month in April 2016 (+11.0%) with gains in arrivals by auto (+9.9%), air (+13.1%) and by other modes (+10.6%).

QUICK LINKS

Industry Performance Dashboard

	April 2016	YTD
 Overnight Arrivals¹		
Total International	↑ 10.0%	↑ 14.7%
11 DC Markets**	↑ 10.6%	↑ 15.5%
Non-DC Markets	↑ 6.0%	↑ 9.0%
 Air Seat Capacity²		
Total International	↑ 1.8%	↑ 4.3%
11 DC Markets**	↑ 1.1%	↑ 3.6%
Non-DC Markets	↑ 3.3%	↑ 5.6%
 National Hotel Indicators³		
Occupancy Rate*	↑ 1.3	↓ -0.4
Revenue Per Available Room (Revpar)	↑ 1.8%	↑ 2.0%
Average Daily Rate (ADR)	↑ 4.1%	↑ 1.3%

Notes:

The Industry Performance Dashboard figures are year-on-year (2016/2015) variations.

* Percentage point variations.

** The 11 DC markets are US, France, Germany, UK, Australia, China, India, Japan, South Korea, Brazil and Mexico.

Sources:

1. International Travel Survey, Statistics Canada.

2. Diiio Mi.

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	
		April 2016	YTD 2016	April 2016	YTD 2016	April 2016	YTD 2016	April 2016 Average	YTD Average
United States	United States	801,425	2,696,522	11.0%	17.1%	0.1%	2.3%	4.1%	9.1%
DC Europe	France	29,800	104,147	1.6%	4.1%	-4.7%	2.5%	9.2%	8.7%
	Germany	17,562	59,179	10.9%	11.2%	-3.3%	2.2%	9.2%	8.7%
	United Kingdom	39,529	142,055	-2.3%	5.7%	-6.3%	-1.0%	-0.6%	3.5%
DC Asia-Pacific	Australia	14,576	57,232	16.5%	7.5%	0.0%	-11.7%	3.0%	1.9%
	China	32,575	121,647	24.0%	13.3%	29.1%	20.4%	-0.4%	4.2%
	India	14,432	40,831	-0.9%	5.4%	57.4%	58.6%	-1.8%	1.2%
	Japan	15,802	62,518	5.1%	7.5%	-3.0%	3.9%	13.4%	14.4%
	South Korea	13,855	47,195	32.3%	23.0%	13.5%	21.7%	-1.5%	2.3%
DC Latin America	Brazil	7,673	27,460	23.8%	0.1%	-19.5%	6.5%	-11.4%	-17.2%
	Mexico	16,555	61,129	8.1%	25.7%	58.3%	57.8%	-9.5%	-8.4%
Total 11 DC Markets		1,003,784	3,419,915	10.6%	15.5%				
Rest of the World		130,711	427,919	6.0%	9.0%				
Total International		1,134,495	3,847,834	10.0%	14.7%				

Sources:

i. International Travel Surey, Statistics Canada.

ii. Dlio Mi.

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 in the current month and year-to-date relative to the same periods in 2015.

iii. The exchange rate variation is calculated on the average value of the Canadian dollar during the current month and the year-to-date compared to the same periods in 2015.

UNITED STATES

US Arrivals to Canada

CURRENT MONTH:

+11.0% ↑ YOY



YTD:

+17.1% ↑ YOY

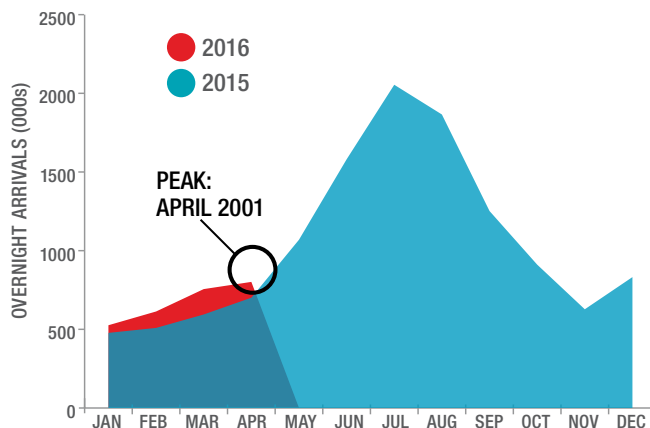
Overnight Arrivals

	April 2016		YTD 2016	
	Arrivals	% YOY Variance	Arrivals	% YOY Variance
🚗 Automobile	467,529	9.9	1,572,651	17.8
✈️ Air	279,412	13.1	967,290	18.6
☎️ Other	54,484	10.6	156,581	3.3
US Total	801,425	11.0	2,696,522	17.1

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



Trend Plot: Total United States Arrivals



United States: Key Indicators

Air Seat Capacity ⁱ	April 2016	0.1%
	YTD	2.3%
Exchange Rate ⁱⁱ	April 2016	4.1%
	YTD	9.1%
Consumer Confidence Index (1985=100) ⁱⁱⁱ	April 2016	94.7
	Previous Month	96.1
YTD Arrival Peak ^{iv}	Peak Year	2002
	Current % of Previous Peak	89.6%

Source:
i. Diio Mi, Year on year % variance.
ii. Bank of Canada, Year on year % variance.
iii. Consumer Confidence Index, the Conference Board (USA).
iv. Statistics Canada, International Travel Survey.

UNITED STATES

- Canada welcomed about 801,000 overnight visitors from the US in April 2016, which is the highest level of visitors for the month of April registered since 2004. The US visitor peak on record during for April occurred in 2001, with about 890,000 overnight trips.
- In April 2016, overall arrivals from the US rose 11.0% over 2015, with growth recorded in arrivals by auto (+9.9%), by air (+13.1%) and other modes of transport (+10.6%). April 2016 was the sixth consecutive month of double-digit overnight arrival growth from the US.
- From January to April 2016, total US visitation to Canada rose 17.1% to 2.7 million overnight visits. Arrivals by auto and by air – the two primary modes of arrivals – registered robust up swings of 17.8% and 18.6% respectively. Arrivals by other modes of transport – such as rail, bus and sea – recorded a smaller (3.3%) increase during the first four months of the year.
- While the Canadian dollar gained strength vis-à-vis the US dollar over the first four months of 2016, on a year-over-year basis the average value of US dollar was 9.1% higher on average than the first four months of 2015, thus contributing to maintain growth momentum in overnight arrivals from the US in April 2016.
- With unchanged air capacity between Canada and the US, increased US visitors to Canada by air (+13.1% or up 32,400 passengers) made up a larger share of utilized capacity as a result of fewer Canadians travelling by air to the US (-9.1% or down 75,600 passengers) in April 2016.
- The consumer confidence index published by the US Conference Board fell to 94.7 points in April 2016, down from 96.1 points the previous month, as US consumers' economic outlook for business, financial and employment conditions grew somewhat more pessimistic.

EUROPE

Europe Arrivals to Canada

CURRENT MONTH:

+1.5% ↑ YOY



YTD:

+6.2% ↑ YOY

Overnight Arrivals

	April 2016		YTD 2016	
	Arrivals	% YOY Variance	Arrivals	% YOY Variance
DC Europe	86,891	1.5	305,381	6.2
United Kingdom	39,529	-2.3	142,055	5.7
France	29,800	1.6	104,147	4.1
Germany	17,562	10.9	59,179	11.2
Secondary Markets				
Italy	6,192	-3.5	19,874	-2.1
Netherlands	7,424	31.3	19,990	23.7
Spain	3,082	5.6	11,097	19.7
Switzerland	6,482	5.6	22,540	14.6
Rest of Europe	34,276	3.8	119,948.0	11.7
Total Europe	144,347	3.3	498,830	8.3



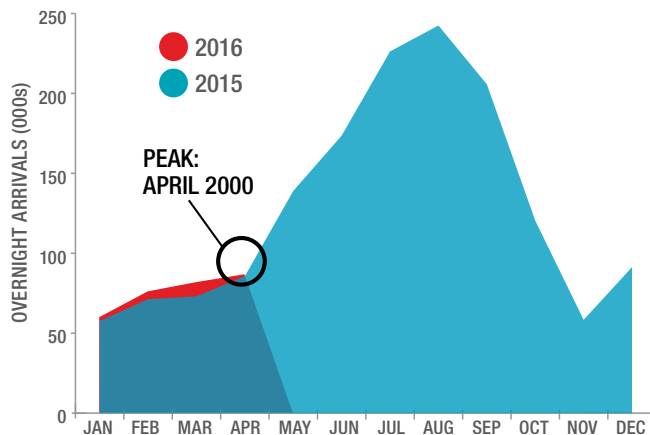
Source: Statistics Canada, International Travel Survey.
Note: The figures are preliminary estimates and are subject to change.

DC Europe: Key Indicators

		France	Germany	United Kingdom
Air Seat Capacityⁱ	April 2016	-4.7%	-3.3%	-6.3%
	YTD	2.5%	2.2%	-1.0%
Exchange Rateⁱⁱ	April 2016	9.2%	9.2%	-0.6%
	YTD	8.7%	8.7%	3.5%
YTD Arrival Peakⁱⁱⁱ	Peak Year	2012	1996	2001
	Current % of Previous Peak	101.6%	91.6%	73.1%

Sources:
i. Dilo Mi, Year on year % variance.
ii. Bank of Canada, Year on year % variance.
iii. Statistics Canada, International Travel Survey.

Trend Plot: Total DC Europe Arrivals



- Canada welcomed 86,891 visitors from DC's markets in Europe in April 2016, up 1.5% compared to 2015. From January to April 2016, arrivals from DC Europe rose 6.2% relative to the same period in 2015.
- April arrivals from the UK decreased slightly (-2.3%) over 2015. Despite falling air capacity (-6.3% in April and -1% YTD), YTD arrivals from the UK are still higher (+5.7%) than the same period in 2015.
- In April 2016, arrivals from France increased 1.6% while YTD arrivals are up 4.1% relative to 2015. While YTD air capacity to Canada is higher than January-April 2015 (+2.5%), April saw a decline in capacity (-4.7%).
- German arrivals grew 11.0% in April and 11.2% since the start of the year relative to 2015. Similar to France, YTD air capacity to Canada is higher than January-April 2015 (+2.2%), but April saw a decline in capacity (-3.3%). The Euro remains in a stronger position compared to April 2015 (+9.2% and +8.7% YTD), but has been trending downwards since January and February of 2016.

DC Europe Arrivals by Port of Entry

- From January to April 2016, about 70% of arrivals from DC markets in Europe were direct air arrivals from overseas. Air arrivals via the US accounted for about 28% of total arrivals from France, 22% from Germany and 19% from the UK. Land arrivals made up about 5% of French arrivals, 6% of German arrivals and 9% of UK arrivals.
- Notable year-on-year variations include the 39% increase in arrivals from France at YVR airport thanks to the new Air France flight from Paris and the strong increases in the number of German arrivals at Montreal-Trudeau (+21%) and Toronto Pearson (+21%). UK arrivals also recorded strong growth at Montreal (+9%) and Toronto (+10%) airports.

January to April 2016		France	Germany	UK	
Air Arrivals from Overseas	YYZ	Arrivals	10,681	19,464	45,865
		YOY%	-1.4%	20.6%	10.4%
		% of Total	10.3%	32.9%	32.3%
	YVR	Arrivals	3,122	8,616	25,014
		YOY%	39.4%	5.1%	-4.0%
		% of Total	3.0%	14.6%	17.6%
	YUL	Arrivals	53,000	7,845	12,353
		YOY%	0.0%	20.7%	8.9%
		% of Total	50.9%	13.3%	8.7%
	YYC	Arrivals	774	5,005	12,953
		YOY%	-22.1%	7.3%	-2.8%
		% of Total	0.7%	8.5%	9.1%
	All other airports	Arrivals	1,645	1,068	6,078
		YOY%	2.5%	3.0%	6.3%
		% of Total	1.6%	1.8%	4.3%
Subtotal	Arrivals	69,222	41,998	102,263	
	YOY%	1.0%	14.8%	5.2%	
	% of Total	66.5%	71.0%	72.0%	
Air Arrivals via the US	All airports	Arrivals	29,260	13,033	26,851
		YOY%	16.6%	4.1%	6.4%
		% of Total	28.1%	22.0%	18.9%
Sea Arrivals	All sea borders	Arrivals	43	350	338
		YOY%	-24.6%	-36.8%	-97.7%
		% of Total	0.0%	0.6%	0.2%
Land Arrivals via US	All land borders	Arrivals	5,575	3,577	12,507
		YOY%	-11.4%	1.0%	5.8%
		% of Total	5.4%	6.0%	8.8%
Total Overnight Arrivals		104,147	59,179	142,055	

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:

+15.7% ↑ YOY



YTD:

+11.4% ↑ YOY

Overnight Arrivals

	April 2016		YTD 2016	
	Arrivals	% YOY Variance	Arrivals	% YOY Variance
DC Asia-Pacific	91,240	15.7	329,423	11.4
Australia	14,576	16.5	57,232	7.5
China	32,575	24.0	121,647	13.3
India	14,432	-0.9	40,831	5.4
Japan	15,802	5.1	62,518	7.5
South Korea	13,855	32.3	47,195	23.0
Secondary Markets				
Hong Kong	7,598	-8.7	33,454	-1.2
Taiwan	4,460	7.4	17,644	28.2
Rest of Asia-Pacific	30,850	9.2	87,021	2.9
Total Asia-Pacific	134,148	12.2	467,542	9.2

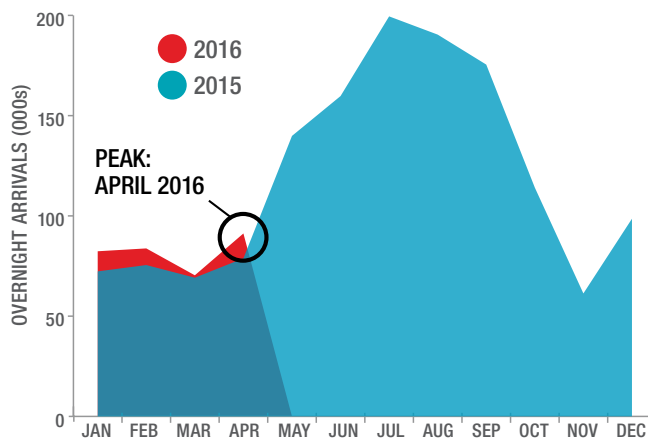


Source: Statistics Canada, International Travel Survey.
Note: The figures are preliminary estimates and are subject to change.

Asia-Pacific: Key Indicators

		Australia	China	India	Japan	South Korea
Air Seat Capacity ⁱ	April 2016	0.0%	29.1%	57.4%	-3.0%	13.5%
	YTD	-11.7%	20.4%	58.6%	3.9%	21.7%
Exchange Rate ⁱⁱ	April 2016	3.0%	-0.4%	-1.8%	13.4%	-1.5%
	YTD	1.9%	4.2%	1.2%	14.4%	2.3%
YTD Arrival Peak ⁱⁱⁱ	Peak Year	2015	2015	2015	1997	2007
	Current % of Previous Peak	107.5%	113.3%	105.4%	47.6%	98.6%

Trend Plot: Total DC Asia-Pacific Arrivals



Sources:
i. Diao Mi, Year on year % variance.
ii. Bank of Canada, Year on year % variance.
iii. Statistics Canada, International Travel Survey.

- Canada welcomed 91,240 visitors from DC Asia-Pacific in April 2016, up 15.7%, achieving a new all-time record for a month of April. During the first four months of 2016, overnight visitation rose 11.4%.
- South Korea achieved a 32.3% growth in arrivals in April 2016 and 23.0% in the first four months of 2016. This performance was supported by a 21.7% YTD increase in air capacity over the same period in 2015.
- Overnight arrivals from Japan increased in April 2016 (+5.1%) following a slight decrease in March. Despite a small reduction in April air capacity (-3.0%), YTD growth in capacity (+3.9% YTD) and a more favorable exchange rate relative to the CAD helped support a 7.5% growth in overnight arrivals from Japan since January.
- Visitation from India eased by -0.9% in April 2016 following steady growth since the start of 2016. Year-to-date, Indian arrivals are still up 5.4%. A significant increase in direct air capacity (+57% in April and 59% YTD) from the new nonstop Air Canada flights to Delhi fuelled growth.
- Arrivals from China surged in April with arrivals up 24.0%. Air capacity continues to rise significantly (+20.4% YTD) and Chinese visitors benefited from a favorable exchange rate. Chinese arrivals are on track for another record year with 13.3% YTD growth.
- Australia posted a 16.5% increase in April 2016 and 7.5% YTD despite declines in air capacity (-11.7% YTD). More Australians entered Canada through the US than in 2015 (+8.4% by air, +12.8% by land).

DC Asia-Pacific Arrivals by Port of Entry

- Over the first four months of 2016, 74% of arrivals from China, 68% from Japan, 64% from India, 52% from South Korea, and 36% from Australia were direct air arrivals from overseas.
- Air arrivals via the US accounted for 49% of total arrivals from Australia, 23% from Japan, 18% from South Korea, 17% from China and 12% from India.
- Arrivals from China to YUL increased 572% thanks to the new Air China flight from Beijing; However, Montreal captures only a 4.9% share of the direct air arrivals from China, well behind YVR (54.3%) and YYZ (40.6%).

January to April 2016		Australia	China	India	Japan	South Korea	
Air Arrivals from Overseas	YYZ	Arrivals	3,275	36,581	16,879	13,233	6,697
		YOY%	8.2%	0.6%	6.3%	-4.6%	12.3%
		% of Total	5.7%	30.1%	41.3%	21.2%	14.2%
	YVR	Arrivals	16,199	48,978	4,884	26,869	17,451
		YOY%	-0.1%	15.9%	4.1%	12.7%	19.5%
		% of Total	28.3%	40.3%	12.0%	43.0%	37.0%
	YUL	Arrivals	411	4,454	1,759	271	193
		YOY%	3.3%	571.8%	-1.6%	65.2%	-11.1%
		% of Total	0.7%	3.7%	4.3%	0.4%	0.4%
	YYC	Arrivals	298	127	1,880	2,331	183
		YOY%	20.2%	-13.0%	6.2%	-18.4%	-55.9%
		% of Total	0.5%	0.1%	4.6%	3.7%	0.4%
	All other airports	Arrivals	146	240	599	65	63
		YOY%	0.7%	0.3%	2.5%	0.2%	0.3%
		% of Total	0.3%	0.2%	1.5%	0.1%	0.1%
	Subtotal	Arrivals	20,329	90,380	26,001	42,769	24,587
		YOY%	1.3%	13.3%	4.7%	4.7%	15.4%
		% of Total	35.5%	74.3%	63.7%	68.4%	52.1%
Air Arrivals via the US	All airports	Arrivals	28,127	21,186	5,056	14,533	8,587
		YOY%	8.4%	16.4%	20.3%	9.7%	19.7%
		% of Total	49.1%	17.4%	12.4%	23.2%	18.2%
Sea Arrivals	All sea borders	Arrivals	622	165	48	76	18
		YOY%	481.3%	2.5%	-27.3%	153.3%	5.9%
		% of Total	1.1%	0.1%	0.1%	0.1%	0.0%
Land Arrivals via US	All land borders	Arrivals	8,067	9,604	9,703	4,413	13,491
		YOY%	12.8%	4.5%	0.8%	10.4%	36.6%
		% of Total	14.1%	7.9%	23.8%	7.1%	28.6%
Total Overnight Arrivals		57,232	121,647	40,831	62,518	47,195	

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

LATIN AMERICA

DC Latin America Arrivals to Canada

CURRENT MONTH: **+12.6% ↑ YOY**



YTD: **+16.5% ↑ YOY**

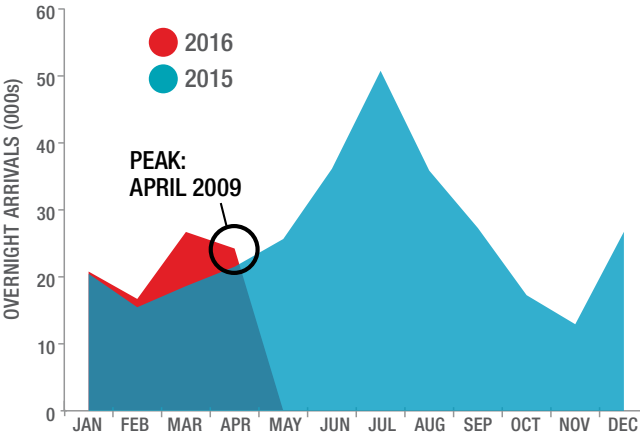
Overnight Arrivals

	April 2016		YTD 2016	
	Arrivals	% YOY Variance	Arrivals	% YOY Variance
DC Latin America	24,228	12.6	88,589	16.5
Brazil	7,673	23.8	27,460	0.1
Mexico	16,555	8.1	61,129	25.7
Rest of Latin America	21,766	4.5	35,773	6.7
Total Latin America	45,994	8.6	124,362	13.5

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



Arrival Trend Plot – Total DC Latin America



DC Latin America: Key Indicators

		Brazil	Mexico
Air Seat Capacityⁱ	April 2016	-19.5%	58.3%
	YTD	6.5%	57.8%
Exchange Rateⁱⁱ	April 2016	-11.4%	-9.5%
	YTD	-17.2%	-8.4%
YTD Arrival Peakⁱⁱⁱ	Peak Year	2016	2008
	Current % of Previous Peak	100.0%	95.8%

Sources:
 i. Diao Mi, Year on year % variance.
 ii. Bank of Canada, Year on year % variance.
 iii. Statistics Canada, International Travel Survey.

LATIN AMERICA

- Canada welcomed 24,228 visitors from the two DC Latin America markets in April 2016, up 12.6% compared to 2015. April 2016 numbers are second-highest on record, only marginally less than the all-time peak in 2009. From January to April 2016, arrivals from DC Latin America rose 16.5%.
- April 2016 was the sixth consecutive month of strong arrival growth from Mexico (+8.1%), contributing to a robust YTD growth (+25.7%). April benefited from significant growth in air capacity (+58.3%, +57.8% YTD). The year-over-year growth in overnight arrivals from Mexico slowed in April 2016 (+8.1%) relative to March 2016 (+54.6%) as a result of the Easter Holiday period falling in March this year as opposed to April last year.
- Arrivals from Brazil also rose significantly in April (+23.8%) after a sluggish March (+1.9%). From January to April 2016, Brazilian arrivals have matched their 2015 totals (+0.1%). April also saw diminishing air capacity (-19.5%, +6.5% YTD). Despite some weak appreciation against the CAD in April, the Brazilian Real is still much weaker (-17.2% against the CAD) than at this time last year due to a troubled economy and political turbulence.

DC Latin America Arrivals by Port of Entry

- Just over half of arrivals from Mexico (55%) and Brazil (53%) were direct air arrivals from overseas since the start of 2016.
- Air arrivals via the US accounted for about 43% of total arrivals to Canada from Brazil and 20% from Mexico. Arrivals by land accounted for 25% of total arrivals from Mexico and 4% from Brazil.
- Notable year-on-year variations include significant increases in arrivals from Mexico at Toronto-Pearson (YYZ) (+29%) and Vancouver International (YVR) (+91%). YVR also saw a 123% increase in arrivals from Brazil (although the number of arrivals remains very small) as a result of the new AeroMexico flight to Vancouver which provides easier air access from Latin America via the Mexico City hub.

January to April 2016		Brazil	Mexico	
Air Arrivals from Overseas	YYZ	Arrivals	13,645	15,374
		YOY%	1.6%	28.8%
		% of Total	49.7%	25.2%
	YVR	Arrivals	442	12,900
		YOY%	123.2%	90.5%
		% of Total	1.6%	21.1%
	YUL	Arrivals	304	4,630
		YOY%	13.4%	2.6%
		% of Total	1.1%	7.6%
	YYC	Arrivals	18	519
		YOY%	-25.0%	-14.5%
		% of Total	0.1%	0.8%
	All other airports	Arrivals	55	461
		YOY%	0.4%	1.9%
		% of Total	0.2%	0.8%
Subtotal	Arrivals	14,464	33,884	
	YOY%	3.6%	39.2%	
	% of Total	52.7%	55.4%	
Air Arrivals via the US	All airports	Arrivals	11,858	11,906
		YOY%	-3.4%	6.9%
		% of Total	43.2%	19.5%
Sea Arrivals	All sea borders	Arrivals	11	35
		YOY%	266.7%	-99.8%
		% of Total	0.0%	0.1%
Land Arrivals via US	All land borders	Arrivals	1,036	15,229
		YOY%	-91.6%	36.7%
		% of Total	3.8%	24.9%
Total Overnight Arrivals		27,460	61,129	

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

COMPETITIVE REVIEW

January to April 2016		Trips To:			
		Canada		Australia	
Trips From:			% YOY Variance		% YOY Variance
Total International		3,847,834	14.7%	2,782,700	11.2%
United States		2,696,522	17.1%	245,100	15.9%
Canada		60,300	1.3%
Europe	United Kingdom	142,055	5.7%	288,100	4.7%
	France	104,147	4.1%	40,700	2.5%
	Germany	59,179	11.2%	73,500	6.2%
Asia-Pacific	Australia	57,232	7.5%
	Japan	62,518	7.5%	135,800	30.0%
	South Korea	47,195	23.0%	103,000	26.5%
	China	121,647	13.3%	487,100	23.3%
	India	40,831	5.4%	82,300	0.4%
Latin America	Mexico	61,129	25.7%	2,900	0.0%
	Brazil	27,460	0.1%	15,200	-10.6%
Total DC Key Markets		3,419,915	15.5%	1,534,000	14.7%

Sources:

Statistics Canada, International Travel Survey Border Counts.

Australian Bureau of Statistics, Overseas Arrivals and Departures, cat. no. 3401.0.

- From January to April 2016, Canada registered a slightly higher increase in total international arrivals (+14.7%) than Australia (+11.2%) compared with 2015. Canada welcomed 3.85 million international visitors, compared with 2.78 million in Australia.
- Among DC's markets, Canada registered stronger growth than Australia, with arrivals increasing 15.5% - compared to 14.7% in Australia. Arrivals from DC markets totalled nearly 3.42 million trips to Canada compared to 1.53 million in Australia.
- Tourism flows between Canada and Australia are relatively on par. Approximately 60,300 Canadian travellers visited Australia year-to-date (+1.3%), while 57,200 Australia travellers visited Canada (+7.5%).
- Canada registered stronger growth than Australia from the US (+17.1% vs +15.9%) since the start of the year. Canada welcomed nearly eleven times more American visitors than Australia (2.7 million vs 245,000 visits).
- Australia continues to post a surge in arrivals from China (+23.3%), outpacing the growth rate recorded in Canada (+13.3%). China remains Australia's main long-haul inbound market with 487,000 visitors since the start of 2016, compared to just short of 122,000 to Canada.
- In addition to China, Australia recorded stronger YTD growth than Canada from Japan (+30.0% vs +7.5%) and South Korea (+26.5% vs +23.0%).
- Canada registered larger gains than Australia in arrivals from all other DC markets, including France (+4.1% vs 2.5%), Mexico (+25.7% vs +0%), Germany (+11.2% vs 6.2%) and India (+5.4% vs 0.4%).

INTERNATIONAL ARRIVALS BY PROVINCE OF ENTRY

Overnight Arrivals by Province of Entry, Year to Date

		Newfoundland and Labrador	Prince Edward Island	Nova Scotia	New Brunswick	Québec	Ontario
Total One or more nights	2016	6,969	23	13,195	26,746	627,314	1,743,150
	Variance YOY%	-11.9%	0.0%	-0.6%	19.7%	17.9%	14.0%
	Change YOY	(940)	-	(78)	4,406	95,257	214,037
US Residents by Automobile	2016	0	0	0	25,601	249,548	738,083
	Variance YOY%	0.0%	0.0%	0.0%	21.2%	28.6%	14.1%
	Change YOY	-	False	-	4,476	55,494	91,267
US Residents by Non-Automobile	2016	763	19	7,470	846	172,176	514,232
	Variance YOY%	-59.0%	0.0%	0.6%	-5.8%	15.3%	19.3%
	Change YOY	(1,097)	19	44	(52)	22,849	83,225
Residents from Other Countries	2016	6,206	4	5,725	299	205,590	490,835
	Variance YOY%	2.6%	-82.6%	-2.1%	-5.7%	9.0%	8.8%
	Change YOY	157	(19)	(122)	(18)	16,914	39,545

Source: International Travel Survey, Statistics Canada.

Overnight Arrivals by Province of Entry, Year to Date

		Manitoba	Saskatchewan	Alberta	British Columbia	Yukon	CANADA
Total One or more nights	2016	44,014	16,279	189,030	1,172,637	8,477	3,847,834
	Variance YOY%	14.6%	2.7%	4.8%	18.8%	15.4%	15.4%
	Change YOY	5,620	432	8,660	185,193	1,132	513,719
US Residents by Automobile	2016	26,306	8,782	18,237	498,552	7,542	1,572,651
	Variance YOY%	17.7%	17.1%	11.4%	18.4%	18.1%	17.8%
	Change YOY	3,952	1,280	1,860	77,601	1,154	237,084
US Residents by Non-Automobile	2016	15,979	6,813	114,197	291,070	306	1,123,871
	Variance YOY%	15.0%	-3.2%	8.2%	27.1%	48.5%	18.8%
	Change YOY	2,080	(227)	8,621	61,991	100	177,553
Residents from Other Countries	2016	1,729	684	56,596	383,015	629	1,151,312
	Variance YOY%	-19.2%	-47.6%	-3.1%	13.5%	-16.2%	9.4%
	Change YOY	(412)	(621)	(1,821)	45,601	(122)	99,082

- From January to April 2016, the largest increases in total international arrivals to Canada were recorded through Ontario (+214,000, +14.0%), British Columbia (+185,000, +18.8%), and Quebec (+95,250, +17.9%).
- All three provinces (Ontario, BC and Quebec) registered strong gains in US arrivals by auto and non-auto modes as well as from overseas since the start of 2016.
- Eight provinces and territories recorded double-digit growth in arrivals by automobile from the US, with Quebec leading the way (+28.6%), followed by New Brunswick (+21.2%), BC (+18.4%), the Yukon (+18.1%), Manitoba (+17.7%), Saskatchewan (+17.1%), Ontario (+14.1%), and Alberta (+11.4%).
- In April 2016, international overnight arrivals to the Atlantic Provinces expanded by 7.2% as arrivals through Nova Scotia (+18.1%) and New Brunswick (+8.7%) more than offset contractions through Newfoundland and Labrador (-18.5%). Year to date, the Maritime region recorded a 7.4% growth in international overnight arrivals as the number of visitors through New Brunswick (+19.7) compensated for fewer overnight arrivals through Newfoundland and Labrador (-13.5%), while Nova Scotia and PEI where on par with 2015.

CANADIAN OUTBOUND TRAVEL

Overnight Trips by Canadians

	Apr. 2016	YOY % Variance	Jan.- Apr. 2016	YOY % Variance
United States	1,610,310	-16.2	5,995,024	-14.2
Other Countries	1,140,176	4.0	4,918,682	5.6
Total Trips from Canada	2,750,486	-8.9	10,913,706	-6.3

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

- In April 2016, the number of overnight trips by Canadians to international destinations, including the US, declined to 2.75 million, a decline of 8.9% relative to April 2015. While the number of overnight trips by Canadians to the US fell by 16.2% year-over-year, it rose by 4% to overseas destinations.
- During the first four months of 2016, total Canadian outbound travel fell 6.3% to 10.9 million trips. Largely as a result of the depreciation of the loonie relative to the US dollar, Canadians limited their travel to the US by 14.2%, substituting for overseas countries (+5.6%) as alternative destinations.
- Amid some signs of a recovering Canadian economy in early 2016, the index of consumer confidence published by the Conference Board of Canada rose by 2.3 points to 94.5 (2014 = 100) in April.
- In April 2016, most Canadian residents returned to the country from abroad through Ontario (1.3 million re-entries, -5.3%), BC (500,000 re-entries, -11.5%) and Quebec (460,000 re-entries, -9.7%).
- In April 2016, Canadian residents returning home from the US primarily re-entered Canada through Ontario (745,000 re-entries, -14.8%), BC (325,000 re-entries, -16.5%) and Quebec (230,000 re-entries, -18.3%).

ACCOMMODATION

Hotel Performance Indicators by Province

	Occupancy Rates				Average Daily Rate (ADR)				Revenue Per Available Room (RevPAR)			
	Apr. 2016	YOY [^] Variance	Jan.- Apr.	YOY [^] Variance	Apr. 2016	YOY % Variance	Jan.- Apr.	YOY % Variance	Apr. 2016	YOY % Variance	Jan.- Apr.	YOY % Variance
Alberta¹	50.3%	-8.8	47.7%	-10.7	\$129.88	-7.7%	\$130.07	-7.9%	\$65.35	-21.5%	\$62.07	-24.8%
British Columbia	66.1%	5.3	60.8%	3.0	\$146.97	12.1%	\$146.71	9.1%	\$97.13	21.9%	\$89.23	14.7%
Saskatchewan	57.5%	-2.1	51.6%	-4.4	\$127.26	-5.7%	\$127.59	-3.7%	\$73.17	-9.0%	\$65.78	-11.2%
Manitoba	62.4%	2.0	59.6%	0.5	\$119.62	1.2%	\$118.47	0.3%	\$74.61	4.6%	\$70.60	1.1%
Ontario	65.1%	4.1	58.7%	2.2	\$134.73	2.6%	\$133.71	3.2%	\$87.72	9.5%	\$78.53	7.2%
Quebec	61.2%	1.5	58.4%	1.4	\$140.55	-1.1%	\$141.90	2.1%	\$85.96	1.3%	\$82.82	4.5%
New Brunswick	55.5%	8.3	45.1%	2.5	\$110.72	1.3%	\$108.67	1.2%	\$61.45	19.0%	\$49.03	7.3%
Nova Scotia	64.2%	6.5	53.0%	2.6	\$124.12	2.6%	\$119.84	1.8%	\$79.62	14.1%	\$63.52	7.0%
Newfoundland	57.3%	-6.3	49.2%	-6.2	\$133.27	-3.2%	\$133.01	-1.8%	\$76.36	-12.8%	\$65.46	-12.8%
Prince Edward Island	45.0%	3.9	41.3%	5.7	\$102.20	-2.3%	\$100.71	1.7%	\$45.98	7.1%	\$41.56	18.1%
Northwest Territories	51.2%	-3.5	74.4%	8.5	\$160.80	3.4%	\$155.99	-1.4%	\$82.32	-3.1%	\$116.09	11.3%
Yukon	57.3%	-0.3	57.1%	2.3	\$117.02	6.4%	\$112.10	2.9%	\$67.00	5.9%	\$64.03	7.1%
Canada	61.0%	1.3	56.0%	-0.4	\$136.18	1.8%	\$136.13	2.0%	\$83.04	4.1%	\$76.26	1.3%

Note: Based on the operating results of 223,202 rooms (unweighted data).

[^] Percentage points.

¹ Excluding Alberta resorts.

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

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- During April 2016, the National Occupancy Rate increased 1.3 points (relative to April 2015) to 61% amid mixed performance indicators for the accommodation sector across Canada. Since the start of the year, the National Occupancy Rate declined 0.4% to 56.0%.
- With the downturn in the resource and commodity sectors impacting business travel, hotel performance in oil and gas producing provinces sustained contractions in occupancy rates in April relative to the previous year, with the strongest impact being felt in the three provinces with a large oil and gas sector: Alberta (-8.8 points), Newfoundland and Labrador (-6.3 points) and Saskatchewan (-2.1 points). Both the average daily rate and the revenue per available room (RevPar) declined in the face of lower demand and occupancy. Alberta recorded the largest decline (-21.5%) in April RevPar (relative to the previous year), followed by Newfoundland and Labrador (-12.8%) and Saskatchewan (-9.0%).
- Other Canadian regions had more positive numbers in April 2016. BC, New Brunswick, and Nova Scotia saw the strongest performance. Occupancy rose 5.3% in BC, 8.3% in New Brunswick, and 6.5% in Nova Scotia compared to 2015. RevPar increased by 21.9% in BC, by 19.0% in New Brunswick, and by 14.1% in Nova Scotia.
- Among specific destinations, Greater Vancouver (RevPar +9%), Vancouver Island (+16%), and Southern Ontario (+17%) saw particularly strong performance. Vancouver Island performance was largely driven by very strong results in Nanaimo (+43%) and Parksville (+37%), while London (+34%) stood out for Southern Ontario.

ACCOMMODATION

Hotel Performance Indicators by Property Type

	Occupancy Rates				Average Daily Rate (ADR)			
	Apr. 2016	YOY [^] Change	Jan.- Apr.	YOY [^] Variance	Apr. 2016	YOY Variance	Jan.- Apr.	YOY Variance
Property Size								
Under 50 rooms	43.9%	-0.3	40.4%	-2.9	\$97.47	-2.3%	\$99.21	-0.3%
50-75 rooms	52.4%	0.3	48.0%	-1.6	\$104.14	0.5%	\$104.41	-0.6%
76-125 rooms	58.5%	1.0	53.7%	-1.2	\$119.48	-1.1%	\$119.94	-0.9%
126-200 rooms	63.6%	1.9	57.6%	-0.4	\$126.95	1.4%	\$125.50	0.9%
201-500 rooms	65.4%	1.9	60.4%	0.6	\$158.83	4.2%	\$159.15	4.4%
Over 500 rooms	67.9%	2.0	63.7%	2.3	\$180.42	3.8%	\$178.62	3.8%
Total	61.0%	1.3	56.0%	-0.4	\$136.18	1.8%	\$136.13	2.0%
Property Type								
Limited Service	55.2%	0.3	50.2%	-1.8	\$108.56	-1.3%	\$108.58	-1.1%
Full Service	64.9%	1.9	58.6%	0.0	\$146.88	3.0%	\$142.30	2.0%
Suite Hotel	71.3%	2.9	66.1%	1.5	\$141.51	0.5%	\$142.96	2.1%
Resort	47.3%	1.2	55.4%	3.2	\$178.30	6.4%	\$208.71	10.5%
Total	61.0%	1.3	56.0%	-0.4	\$136.18	1.8%	\$136.13	2.0%
Price Level								
Budget	53.6%	3.6	48.2%	1.5	\$89.84	5.2%	\$88.47	4.0%
Mid-Price	62.7%	0.3	57.4%	-1.5	\$132.55	0.4%	\$130.60	0.0%
Upscale	64.5%	2.2	61.7%	1.3	\$210.05	6.2%	\$214.01	7.3%
Total	61.0%	1.3	56.0%	-0.4	\$136.18	1.8%	\$136.13	2.0%

Note: Based on the operating results of 223,202 rooms (unweighted data).

[^] Percentage points.

- Since the beginning of 2016, larger hotels (greater than 200 rooms) generally fared better in terms of occupancy and average daily rates. The largest properties (hotels with over 500 rooms) registered the strongest performance with occupancy up 2.3 points and ADR up 3.8% since the start of the year.
- Nationally, suite hotels and full service hotels had similar occupancy (2.1% and 2.0%, respectively) in the first four months of 2016.
- Resorts recorded the highest growth in occupancy rate (+3.3 points) and ADR (+10.5 points) nationwide from January to April 2016 relative to last year. Nowhere was this more pronounced than in Western Canada, where resorts have seen YTD ADR growth of 12.9%.