



Tourism Snapshot

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

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Canada

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KEY HIGHLIGHTS

- In April 2017, overnight arrivals to Canada from Destination Canada's 11 international markets rebounded from the pre-Easter March lull to average +14.6% year-over-year. Destination Canada's ten overseas markets soared +35.7% over April 2016, 14 percentage points over arrivals from non-Destination Canada markets, while arrivals from the United States rose by 9.3% year-over-year.
- Over the first four months of 2017, overnight arrivals from Destination Canada's ten overseas markets expanded by 21.1%. All ten markets grew at a double-digit pace, led by Latin America (+42.6%), followed by Asia-Pacific (+22.0%) and Europe (+13.9%). Arrivals from the US were up 2.0% YTD April 2017, reaching the highest level since 2005.
- In April 2017, overnight arrivals from Destination Canada's two Latin American markets increased by 86.3% year-over-year, which was attributable to spectacular gains from Mexico (+126.1%) and record April arrivals from both markets. Year-to-date in 2017 both markets achieved new record high arrivals, with Mexico (+56.8%) beating its 2008 record and Brazil (+11.0%) surpassing the peak it established last year.
- DC Europe achieved new record arrivals for both the month of April (+34.0%) and for the first four months of the year (+13.9%) in 2017, exceeding the previous peaks set in 2000. In April 2017, both Germany (+45.7%) and France (+8.5%) achieved new record highs, which were previously established in 2000 and 2012, respectively. Meanwhile, arrivals from the United Kingdom (+47.9%) were second to the peak set in 2000.
- The DC Asia-Pacific markets grew by 23.8% in April 2017 on the basis of strong growth in arrivals from South Korea (+39.7%), India (+37.2%), Australia (+24.7%) and China (+21.6%). Year-to-date 2017, arrivals from all five DC Asia Pacific markets increased by 22% relative to the same period in 2016.
- Following the marked slowdown in March 2017 as a result of Easter occurring later in April this year, US overnight arrivals in April 2017 (+9.3%) rebounded across all three modes of transportation, with air (+12.1%) gaining shares over automobile arrivals (+7.7%) and arrivals by other modes of transportation (+8.9%). Year-to-date, gains in arrivals by air (+6.1%) and other modes of transportation (+4.7%) largely offset a slight contraction in automobile overnight arrivals (-1.0%).

QUICK LINKS

Industry Performance Dashboard

	April 2017	YTD
✈ Overnight Arrivals¹		
Total International	↑ 15.4%	↑ 6.7%
11 DC Markets**	↑ 14.6%	↑ 6.0%
<i>United States</i>	↑ 9.3%	↑ 2.0%
10 Overseas Markets	↑ 35.7%	↑ 21.1%
Non-DC Markets	↑ 21.5%	↑ 12.5%
✈ Air Seat Capacity²		
Total International	↑ 3.6%	↑ 2.0%
11 DC Markets**	↑ 9.6%	↑ 6.5%
Non-DC Markets	↓ -1.0%	↓ -1.4%
🏠 National Hotel Indicators³		
Occupancy Rate*	↑ 0.9	↑ 1.4
Revenue Per Available Room (Revpar)	↑ 3.3%	↑ 2.6%
Average Daily Rate (ADR)	↑ 4.7%	↑ 5.2%

Notes:

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

* Percentage point variations.

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

Sources:

1. Statistics Canada, Frontier counts, custom tabulations

2. IATA-Diio SRS Analyser

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

MARKET MONITOR SUMMARY

	Market	Overnight Arrivals ⁱ		Arrival YOY Variations (%)		Air Seat capacity ⁱⁱ		Local currency vs. CAD ⁱⁱⁱ	
		Apr. 2017	YTD 2017	Apr. 2017	YTD 2017	Apr. 2017	YTD 2017	Apr. 2017 Average	YTD Average
United States	United States	881,188	2,790,409	9.3%	2.0%	5.3%	1.8%	4.8%	-1.7%
DC Europe	France	32,339	114,740	8.5%	10.2%	17.0%	10.6%	-0.9%	-5.5%
	Germany	25,592	68,801	45.7%	16.3%	13.2%	11.4%	-0.9%	-5.5%
	United Kingdom	58,472	164,192	47.9%	15.6%	15.0%	14.6%	-7.4%	-14.5%
DC Asia-Pacific	Australia	18,181	70,961	24.7%	24.0%	104.9%	101.4%	3.1%	1.7%
	China	39,620	143,973	21.6%	18.4%	33.7%	40.5%	-1.4%	-6.9%
	India	19,797	51,440	37.2%	26.0%	39.4%	57.6%	7.9%	-0.3%
	Japan	16,025	75,804	1.4%	21.3%	15.2%	14.3%	4.3%	-0.7%
	South Korea	19,351	59,582	39.7%	26.2%	47.7%	36.7%	6.0%	1.8%
DC Latin America	Brazil	7,701	30,470	0.4%	11.0%	-21.5%	-34.6%	19.1%	19.4%
	Mexico	37,437	95,821	126.1%	56.8%	43.0%	36.5%	-2.4%	-11.5%
Total 11 DC Markets		1,155,703	3,666,193	14.6%	6.0%				
Rest of the World		158,830	481,235	21.5%	12.5%				
Total International		1,314,533	4,147,428	15.4%	6.7%				

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:

+9.3% ↑ YOY



YTD:

+2.0% ↑ YOY

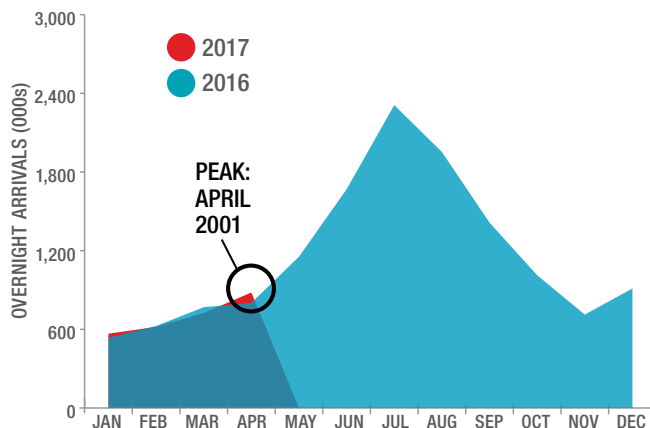
Overnight Arrivals

	April 2017		YTD 2017	
	Arrivals	% YOY Variance	Arrivals	% YOY Variance
Automobile	503,672	7.7	1,557,706	-1.0
Air	318,129	12.1	1,074,032	6.1
Other	59,387	8.9	158,671	4.7
US Total	881,188	9.3	2,790,409	2.0

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



Trend Plot: Total United States Arrivals



United States: Key Indicators

Air Seat Capacity ⁱ	April 2017	5.3%
	YTD	1.8%
Exchange Rate ⁱⁱ	April 2017	4.8%
	YTD	-1.7%
Consumer Confidence Index (1985=100) ⁱⁱⁱ	April 2017	119.4
	Previous Month	124.9
YTD Arrival Peak ^{iv}	Previous Peak Year	2002
	Current % of Previous Peak	87.8%

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

- As expected with Easter falling later this year – in April, vs. March last year – US overnight arrivals to Canada rebounded in April 2017 following the previous month's year-over-year decline. The gain in total arrivals (+9.3% over April 2016) was observed across all three transportation categories: air (+12.1%), auto (+7.7%), and other modes, such as bus, train, and cruise (+8.9%).
- US arrivals also increased slightly year-over-year over the first four months of 2017 (+2.0%), with increased arrivals by air (+6.1%) and other modes (+4.7%) offsetting the drop in auto arrivals (-1.0%).
- Ongoing expansion of air capacity between Canada and the US (+5.3% in April, +1.8% YTD) supported the strong growth in air arrivals from the US. The US dollar (-1.7% YTD) also continued to show signs of improved strength against the Canadian dollar in April (+4.8%).
- Looking closer at auto arrivals, the top states of origin for US overnight arrivals by vehicle¹ in April 2017 were New York (21.7% of arrivals), Washington (18.9%), and Michigan (12.0%), with a significant proportion also driving to Canada from New Jersey (5.2%), Massachusetts (5.0%), Pennsylvania (4.5%), and Ohio (4.1%).
- Following two second consecutive months of strong growth, the consumer confidence index published by the US Conference Board retracted 5.5 points to 119.4 in April 2017.

¹ States of origin information is based on Integrated Primary Inspection Lane data collected from US residents entering Canada in automobiles with license plate registered in the United States.

EUROPE

Europe Arrivals to Canada

CURRENT MONTH:

+34.0% ↑ YOY



YTD:

+13.9% ↑ YOY

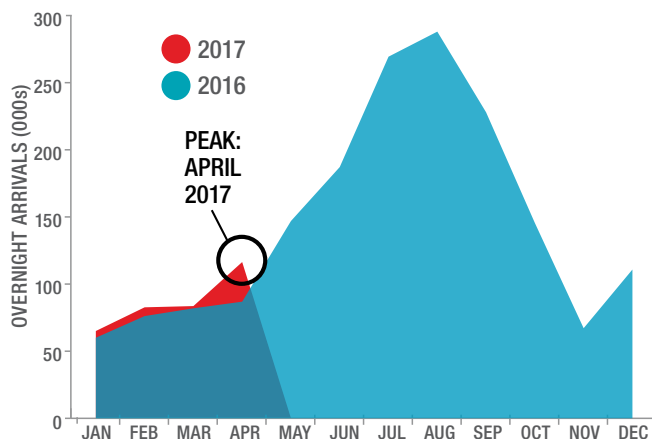
Overnight Arrivals

	April 2017		YTD 2017	
	Arrivals	% YOY Variance	Arrivals	% YOY Variance
DC Europe	116,403	34.0	347,733	13.9
United Kingdom	58,472	47.9	164,192	15.6
France	32,339	8.5	114,740	10.2
Germany	25,592	45.7	68,801	16.3
Other Europe	73,015	172.9	218,913	68.3
Italy	6,307	1.9	18,811	-5.3
Netherlands	9,433	27.1	24,595	23.0
Spain	5,857	90.0	14,686	32.3
Switzerland	8,306	28.1	23,381	3.7
Rest of Europe	43,112	25.8	137,440	14.6
Total Europe	189,418	31.2	566,646	13.6

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 Capacityⁱ	April 2017	17.0%	13.2%	15.0%
	YTD	10.6%	11.4%	14.6%
Exchange Rateⁱⁱ	April 2017	-0.9%	-0.9%	-7.4%
	YTD	-5.5%	-5.5%	-14.5%
YTD Arrival Peakⁱⁱⁱ	Previous Peak Year	2016	1996	2001
	Current % of Previous Peak	110.2%	106.5%	84.5%

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.

- With 116,403 visitors to Canada in April 2017, Destination Canada's Europe region rebounded from the slowed growth observed in March to achieve remarkable growth of +34.0% year-over-year and setting new monthly and year-to-date records.
- Year-to-date in 2017 arrivals from Destination Canada's Europe region grew +13.9% over the same period last year, thanks to double-digit growth from all three markets – Germany (+16.3%), the UK (+15.6%), and France (+10.2%).
- The UK led the growth in arrivals to Canada in April 2017 (+47.9%), due at least in part to the Easter effect which also contributed to the downward trend in UK visitation observed in March 2017. Increased UK travel to Canada was also supported by the continued expansion of air capacity (+15.0% in April), and did not appear to be hindered by the ongoing significant depreciation of the GBP since the Brexit vote in June 2016.
- Germany was close behind the UK in year-over-year growth in April 2017, reaching new arrivals peaks for the month of April (25,592, +45.7%) and YTD (68,801, +16.3%). This impressive growth was supported by ongoing air capacity expansion (+13.2% in April).
- France observed relatively slower growth in April 2017 compared to Destination Canada's other European markets, but still achieved new record arrivals peaks for both the month of April (32,339, +8.5%) and the first four months of the year (114,740, +10.2%). Continued expansion of air capacity to Canada (+17.0% in April) supported this performance.

		France	Germany	UK	
Air Arrivals from Overseas	YYZ	Arrivals	17,349	26,341	59,705
		YOY%	62.4%	35.3%	30.2%
		% of Total	15.1%	38.3%	36.4%
	YVR	Arrivals	2,780	10,298	32,364
		YOY%	-11.0%	19.5%	29.4%
		% of Total	2.4%	15.0%	19.7%
	YUL	Arrivals	55,973	7,579	11,459
		YOY%	5.6%	-3.4%	-7.2%
		% of Total	48.8%	11.0%	7.0%
	YYC	Arrivals	1,003	4,821	17,392
		YOY%	29.6%	-3.7%	34.3%
		% of Total	0.9%	7.0%	10.6%
All other airports	Arrivals	1,641	1,290	4,671	
	YOY%	2.4%	3.2%	3.9%	
	% of Total	1.4%	1.9%	2.8%	
Subtotal	Arrivals	78,746	50,329	125,591	
	YOY%	13.8%	19.8%	22.8%	
	% of Total	68.6%	73.2%	76.5%	
Air Arrivals via the US	All airports	Arrivals	30,976	13,901	24,925
		YOY%	5.9%	6.7%	-7.2%
		% of Total	27.0%	20.2%	15.2%
Sea Arrivals	All sea borders	Arrivals	209	637	286
		YOY%	386.0%	82.0%	-98.1%
		% of Total	0.2%	0.9%	0.2%
Land Arrivals via US	All land borders	Arrivals	4,809	3,934	13,390
		YOY%	-13.7%	10.0%	7.1%
		% of Total	4.2%	5.7%	8.2%
Total Overnight Arrivals		114,740	68,801	164,192	

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

DC Europe Arrivals by Port of Entry

- YTD in 2017, nearly three-quarters of visitors from Destination Canada's European markets arrived by air directly from overseas. UK travellers were the most likely to arrive by land via the US (8.2%), while visitors from France (27.0%) were the most likely to arrive by air via the US.
- Most direct air arrivals from Destination Canada's three European markets landed at YYZ (40.6%) or YUL (29.5%).

ASIA-PACIFIC

DC Asia-Pacific Arrivals to Canada

CURRENT MONTH:

+23.8% ↑ YOY



YTD:

+22.0% ↑ YOY

Overnight Arrivals

	April 2017		YTD 2017	
	Arrivals	% YOY Variance	Arrivals	% YOY Variance
DC Asia-Pacific	112,974	23.8	401,760	22.0
Australia	18,181	24.7	70,961	24.0
China	39,620	21.6	143,973	18.4
India	19,797	37.2	51,440	26.0
Japan	16,025	1.4	75,804	21.3
South Korea	19,351	39.7	59,582	26.2
Other Asia-Pacific	51,520	74.0	154,490	27.9
Hong Kong	11,200	47.4	35,387	5.8
Taiwan	4,998	12.1	18,874	7.0
Rest of Asia-Pacific	35,322	14.5	100,229	15.2
Total Asia-Pacific	164,494	22.6	556,250	19.0

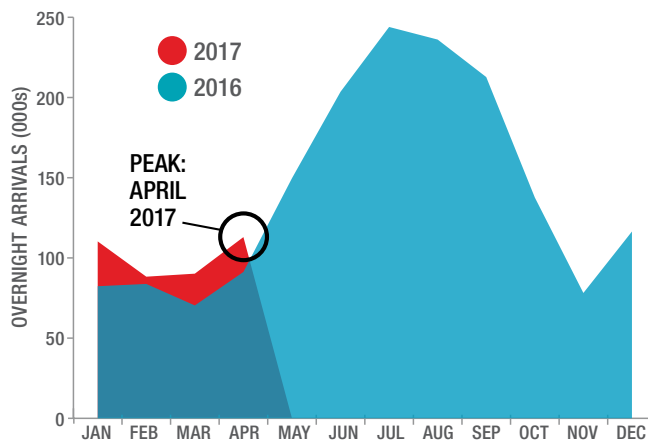


Source: Statistics Canada, Frontier counts, custom tabulations.
Note: The figures are preliminary estimates and are subject to change.

Asia-Pacific: Key Indicators

		Australia	China	India	Japan	South Korea
Air Seat Capacity ⁱ	Apr. 2017	104.9%	33.7%	39.4%	15.2%	47.7%
	YTD	101.4%	40.5%	57.6%	14.3%	36.7%
Exchange Rate ⁱⁱ	Apr. 2017	3.1%	-1.4%	7.9%	4.3%	6.0%
	YTD	1.7%	-6.9%	-0.3%	-0.7%	1.8%
YTD Arrival Peak ⁱⁱⁱ	Previous Peak Year	2016	2016	2016	1997	2007
	Current % of Previous Peak	124.0%	118.4%	126.0%	57.7%	124.4%

Trend Plot: Total DC Asia-Pacific Arrivals



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.

- Arrivals to Canada from Destination Canada's Asia-Pacific region in April 2017 grew 23.8% over April 2016, thanks for record-setting performance from four of the five key markets. China (39,620 visitors in April 2017), India (19,797), South Korea (19,351), and Australia (18,181) all achieved new peaks both for the month of April and the first four months of the year.
- This growth in April 2017 was led by South Korea (+39.7%) and India (+37.2%), followed by Australia (+24.7%) and China (+21.6%), while the Japan market grew at a slower pace (+1.4%).
- Year-to-date over the first four months of 2017, the Asia-Pacific region saw growth of +22.0%, with all five markets recording very strong growth of approximately 20% relative to the same period in 2016. Again this performance was led by South Korea (+26.2%) and India (+26.0%), followed by Australia (+24.0%), Japan (+21.3%), and China (+18.4%).
- The Asia-Pacific region's performance continued to be supported by ongoing air capacity expansion, particularly in the case of Australia (+104.9% in April), as well as South Korea (+47.7%), India (+39.4%), China (+33.7%), and Japan (+15.2%).

DC Asia-Pacific Arrivals by Port of Entry

- Just over two-thirds of visitors from Destination Canada's Asia-Pacific region were direct air arrivals, with a majority of arrivals from four of the five markets entering Canada this way. The exception was Australia with almost equal numbers arriving either direct (44.9%) or via the US by air (43.6%). South Korea was the only market to see year-over-year growth in arrivals by land via the US (+21.3%) and the most likely to arrive this way (27.5%), followed by India (17.7%).
- Almost all direct air arrivals (93.0%) from DC's Asia-Pacific markets arrived via YVR (54.0%) or YYZ (38.9%), with visitors from India being the most likely to land at YYZ (46.5%) and visitors from China most likely to land at YVR (42.7%). The strongest year-over-year growth was observed for Chinese visitors arriving at YYC (+2179.5%) and South Korean visitors arriving at YYZ (+110.0%).

			Australia	China	India	Japan	South Korea
Air Arrivals from Overseas	YYZ	Arrivals	3,993	43,488	23,934	21,310	14,063
		YOY%	21.9%	18.9%	41.8%	61.0%	110.0%
		% of Total	5.6%	30.2%	46.5%	28.1%	23.6%
	YVR	Arrivals	26,742	61,470	8,621	31,080	20,293
		YOY%	65.1%	25.5%	76.5%	15.7%	16.3%
		% of Total	37.7%	42.7%	16.8%	41.0%	34.1%
	YUL	Arrivals	557	6,515	2,038	374	269
		YOY%	35.5%	46.3%	15.9%	38.0%	39.4%
		% of Total	0.8%	4.5%	4.0%	0.5%	0.5%
	YYC	Arrivals	379	2,895	2,025	2,716	161
		YOY%	27.2%	2179.5%	7.7%	16.5%	-12.0%
		% of Total	0.5%	2.0%	3.9%	3.6%	0.3%
	All other airports	Arrivals	167	253	788	75	43
		YOY%	0.8%	0.3%	3.1%	0.2%	0.2%
		% of Total	0.2%	0.2%	1.5%	0.1%	0.1%
Subtotal	Arrivals	31,838	114,621	37,406	55,555	34,829	
	YOY%	56.6%	26.8%	43.9%	29.9%	41.7%	
	% of Total	44.9%	79.6%	72.7%	73.3%	58.5%	
Air Arrivals via the US	All airports	Arrivals	30,905	20,167	4,878	16,503	8,376
		YOY%	9.9%	-4.8%	-3.5%	13.6%	-2.5%
		% of Total	43.6%	14.0%	9.5%	21.8%	14.1%
Sea Arrivals	All sea borders	Arrivals	642	64	62	30	19
		YOY%	3.2%	-61.2%	29.2%	-60.5%	5.6%
		% of Total	0.9%	0.0%	0.1%	0.0%	0.0%
Land Arrivals via US	All land borders	Arrivals	7,574	9,121	9,094	3,716	16,358
		YOY%	-6.1%	-5.0%	-6.3%	-15.8%	21.3%
		% of Total	10.7%	6.3%	17.7%	4.9%	27.5%
Total Overnight Arrivals			70,961	143,973	51,440	75,804	59,582

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: **+86.3% ↑ YOY**



YTD: **+42.6% ↑ YOY**

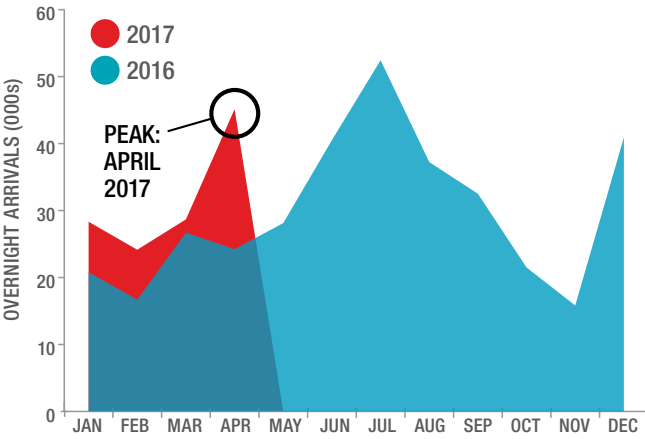
Overnight Arrivals

	April 2017		YTD 2017	
	Arrivals	% YOY Variance	Arrivals	% YOY Variance
DC Latin America	45,138	86.3	126,291	42.6
Brazil	7,701	0.4	30,470	11.0
Mexico	37,437	126.1	95,821	56.8
Other Latin America	25,925	19.1	81,114	15.5
Total Latin America	71,063	54.5	207,405	30.6

Source: Statistics Canada, Frontier counts, custom tabulations.
 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 2017	-21.5%	43.0%
	YTD	-34.6%	36.5%
Exchange Rateⁱⁱ	April 2017	19.1%	-2.4%
	YTD	19.4%	-11.5%
YTD Arrival Peakⁱⁱⁱ	Previous Peak Year	2016	2008
	Current % of Previous Peak	111.0%	150.2%

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

LATIN AMERICA

- Following a month of slowed but positive year-over-year growth, arrivals from Destination Canada's Latin America region rose sharply by +86.3%, reaching a new peak of 45,138 visitors in April. The region also continued to achieve record arrivals year-to-date (126,291, +42.6%).
- These sharp shifts are attributable to the impact of the Easter effect on the Mexican market, with Easter falling in March last year and in April this year. This led to slowed growth in March 2017 from a market which had displayed a strong upward trend since the replacement of the visa requirement with the Electronic Travel Authority (eTA), followed by a sharp return to positive growth in April 2017. Arrivals to Canada from Mexico recorded spectacular gains in April, jumping +126.1% year-over-year to reach a new peak of 37,437 visitors. This brought total arrivals over the January to April period to a record 95,821 visits, up 56.8% over the same period in 2016 and +50.2% over the previous peak in 2008. This positive trend continued to be supported by significant expansion of air capacity (+36.5% YTD), mitigating the effect of a weaker Peso (-11.5% YTD).
- Meanwhile arrivals from Brazil, which had jumped in March, slowed to +0.4% year-over-year in April 2017. Though this increase was very small in contrast with Mexico, Brazil still achieved record arrivals both for the month of April (7,701) and year-to-date (30,470, +11.0%). This is particularly notable given the ongoing contraction of air capacity to Canada (-34.6% YTD), and may be supported by the recent positive trend observed with the strength of the Real vs. the Canadian dollar.

DC Latin America Arrivals by Port of Entry

- Visitors from Mexico (61.9%) and Brazil (59.7%) primarily travelled to Canada by air direct from overseas. The remainder of Brazilians primarily travelled by air via the US (36.9%), while Mexicans travelled through the US both by air (20.7%) and by land (17.4%).
- Almost all direct air arrivals from Brazil landed at YYZ (93.9%), while those from Mexico usually arrived at either YYZ (46.2%) or YVR (33.8%).

			Brazil	Mexico
Air Arrivals from Overseas	YYZ	Arrivals	17,075	27,396
		YOY%	25.1%	78.2%
		% of Total	56.0%	28.6%
	YVR	Arrivals	669	20,035
		YOY%	51.4%	55.3%
		% of Total	2.2%	20.9%
	YUL	Arrivals	388	10,054
		YOY%	27.6%	117.1%
		% of Total	1.3%	10.5%
	YYC	Arrivals	14	964
		YOY%	-22.2%	85.7%
		% of Total	0.0%	1.0%
	All other airports	Arrivals	36	817
		YOY%	0.2%	2.4%
		% of Total	0.1%	0.9%
Subtotal	Arrivals	18,182	59,266	
	YOY%	25.7%	74.9%	
	% of Total	59.7%	61.9%	
Air Arrivals via the US	All airports	Arrivals	11,240	19,847
		YOY%	-5.2%	66.7%
		% of Total	36.9%	20.7%
Sea Arrivals	All sea borders	Arrivals	4	58
		YOY%	-63.6%	-99.7%
		% of Total	0.0%	0.1%
Land Arrivals via US	All land borders	Arrivals	1,044	16,650
		YOY%	-91.2%	39.8%
		% of Total	3.4%	17.4%
Total Overnight Arrivals			30,470	95,821

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

COMPETITIVE REVIEW

January to April 2017		Trips To:			
		Canada		Australia	
Trips From:			YOY Change		YOY Change
Total International		4,147,428	6.7%	2,975,700	6.9%
United States		2,790,409	2.0%	274,600	12.0%
Canada		69,600	15.4%
Europe	United Kingdom	164,192	15.6%	297,200	3.2%
	France	114,740	10.2%	41,700	2.5%
	Germany	68,801	16.3%	80,100	9.0%
Asia-Pacific	Australia	70,961	24.0%
	Japan	75,804	21.3%	143,500	5.7%
	South Korea	59,582	26.2%	110,000	6.8%
	China	143,973	18.4%	519,400	6.6%
	India	51,440	26.0%	93,300	13.4%
Latin America	Mexico	95,821	56.8%	3,400	17.2%
	Brazil	30,470	11.0%	18,500	21.7%
Total DC Key Markets		3,666,193	6.0%	1,651,300	7.6%

Sources:
 Statistics Canada, Frontier counts, custom tabulations.
 Australian Bureau of Statistics, Overseas Arrivals and Departures, cat. no. 3401.0.

- Over the first four months of 2017, Canada welcomed nearly 40% more international visitors than Australia (4.15 million vs. 2.98 million), with the difference in the pace of year-over-year growth between the two countries narrowing (+6.7% for Canada, +6.9% for Australia).
- Canada also welcomed more than twice as many travellers from Destination Canada's 11 core international markets than Australia (3.67 million vs. 1.65 million) over this period, though Australia continued to record slightly stronger year-over-year growth in arrivals from these markets (7.6%, vs. 6.0% for Canada).
- More than 9 times more US travellers visited Canada (2.79 million) than visited Australia (274,600) from January to April 2017, but this market continued to grow at a faster pace in Australia (+12.0%) than in Canada (+2.0%).
- By contrast, Australia continued to receive significantly more visitors from each of Destination Canada's Asia-Pacific markets, particularly from their key market of China. However, with year-over-year growth averaging approximately 20% from all four markets, Canada continued to make good progress in this region with much faster growth than Australia observed from these markets.
- Year-to-date in 2017, Australian arrivals to Canada (70,961, +24.0%) outpaced Canadian arrivals to Australia (69,600, +15.4%) both in total visitors and in year-over-year growth.

INTERNATIONAL ARRIVALS BY PROVINCE OF ENTRY

Overnight Arrivals by Province of Entry

		Newfoundland and Labrador	Prince Edward Island	Nova Scotia	New Brunswick	Québec	Ontario
Total One or more nights	2017	6,936	44	14,079	26,629	655,281	1,958,233
	Variance YOY%	-0.5%	12.8%	6.7%	-0.2%	3.3%	10.7%
	Change YOY	(33)	5	884	(62)	21,219	189,922
US Residents by Automobile	2017	0	0	0	24,447	244,583	750,191
	Variance YOY%	0.0%	0.0%	0.0%	-4.5%	-2.0%	1.6%
	Change YOY	-	-	-	(1,154)	(4,966)	12,108
US Residents by Non-Automobile	2017	1,104	27	7,973	1,599	190,790	596,257
	Variance YOY%	44.7%	-22.9%	6.7%	102.1%	6.6%	10.5%
	Change YOY	341	(8)	503	808	11,867	56,864
Residents from Other Countries	2017	5,832	17	6,106	583	219,908	611,785
	Variance YOY%	-6.0%	325.0%	6.7%	95.0%	7.0%	24.6%
	Change YOY	(374)	13	381	284	14,318	120,950

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

Overnight Arrivals by Province of Entry

		Manitoba	Saskatchewan	Alberta	British Columbia	Yukon	CANADA
Total One or more nights	2017	44,214	12,269	203,646	1,217,918	8,179	4,147,428
	Variance YOY%	0.4%	-24.6%	8.2%	3.1%	-3.5%	6.7%
	Change YOY	178	(4,000)	15,518	36,383	(298)	259,716
US Residents by Automobile	2017	29,184	8,225	17,464	476,481	7,131	1,557,706
	Variance YOY%	10.9%	-6.3%	-4.2%	-4.5%	-5.4%	-1.0%
	Change YOY	2,878	(557)	(773)	(22,192)	(411)	(15,067)
US Residents by Non-Automobile	2017	13,594	3,497	117,001	300,505	356	1,232,703
	Variance YOY%	-15.0%	-48.6%	3.3%	0.2%	16.3%	5.9%
	Change YOY	(2,407)	(3,306)	3,706	658	50	69,076
Residents from Other Countries	2017	1,436	547	69,181	440,932	692	1,357,019
	Variance YOY%	-16.9%	-20.0%	22.2%	15.1%	10.0%	17.9%
	Change YOY	(293)	(137)	12,585	57,917	63	205,707

- In line with previous observations, nearly half of international arrivals to Canada year-to-date in 2017 crossed the border through Ontario (1.96 million, 47% of total arrivals). Ontario was also the only province to record year-over-year growth across the board, with increased arrivals from US residents by automobile (+1.6%), US residents by other modes (+10.5%), and overseas visitors (+24.6%).
- The biggest year-over-year increases in international arrivals were recorded in Ontario (+189,922 additional visitors), British Columbia (+36,383), Quebec (+21,219) and Alberta (+15,518), mainly due to more overseas visitors.
- The slight decrease in US auto arrivals to Canada year-to-date in 2017 was apparent across most provinces, except Manitoba (+10.9%) and Ontario (+1.6%).

CANADIAN OUTBOUND TRAVEL

Overnight Trips by Canadians

	April 2017	YOY % Variance	Jan.- Apr. 2017	YOY % Variance
United States	1,848,538	14.9	6,458,740	7.8
Other Countries	1,195,748	4.9	5,134,476	4.4
Total Trips from Canada	3,044,286	10.7	11,593,216	6.2

Source: Statistics Canada, International Travel Survey.

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

- Overnight trips by Canadians to all international destinations increased in April 2017, reaching 3,044,286, up 10.7% year-over-year. The number of overnight trips by Canadians to the US increased for a fifth consecutive month, up 14.9% (+12.0% by air, +17.2% by auto, +19.7% by other modes). Meanwhile, overnight trips to non-US overseas destinations grew 4.9% year-over-year.
- Over the first four months of 2017, Canadian overnight travel to international destinations increased by 6.2%. Trips to the US – up 7.8% – outpaced trips to other international destinations – up 4.4%.
- Following two consecutive months of increases, in April 2017 the Canadian Consumer Confidence Index (published by the Conference Board of Canada) fell 2.3 points to a still-optimistic 109.4.

ACCOMMODATION

Hotel Performance Indicators by Province

	Occupancy Rates				Average Daily Rate (ADR)				Revenue Per Available Room (RevPAR)			
	Apr. 2017	YOY [^] Variance	Jan.- Apr.	YOY [^] Variance	Apr. 2017	YOY % Variance	Jan.- Apr.	YOY % Variance	Apr. 2017	YOY % Variance	Jan.- Apr.	YOY % Variance
Alberta¹	51.1%	1.2	48.5%	1.2	\$129.04	-1.3%	\$128.08	-2.3%	\$65.93	1.1%	\$62.17	0.3%
British Columbia	67.5%	1.6	62.5%	1.7	\$148.66	1.8%	\$151.66	3.8%	\$100.42	4.3%	\$94.81	6.7%
Saskatchewan	50.9%	-6.3	48.7%	-2.3	\$121.05	-4.8%	\$121.13	-5.1%	\$61.61	-15.2%	\$59.00	-9.4%
Manitoba	64.5%	2.0	63.5%	3.9	\$122.88	2.7%	\$120.74	1.8%	\$79.27	6.0%	\$76.70	8.5%
Ontario	66.3%	1.3	59.9%	1.3	\$144.20	6.3%	\$140.61	4.4%	\$95.66	8.4%	\$84.28	6.7%
Quebec	62.6%	1.5	61.1%	2.7	\$146.85	3.4%	\$148.24	3.7%	\$92.00	5.9%	\$90.60	8.4%
New Brunswick	53.9%	-1.4	48.7%	2.6	\$113.85	2.8%	\$112.24	2.8%	\$61.37	0.2%	\$54.62	8.7%
Nova Scotia	62.0%	-2.0	54.3%	1.2	\$127.53	2.8%	\$122.66	2.4%	\$79.12	-0.4%	\$66.58	4.7%
Newfoundland	57.5%	0.2	52.2%	2.9	\$131.33	-1.5%	\$132.12	-0.7%	\$75.48	-1.2%	\$68.91	5.2%
Prince Edward Island	43.8%	-1.0	40.3%	-0.3	\$106.36	4.1%	\$104.90	4.6%	\$46.64	1.7%	\$42.29	3.7%
Northwest Territories	55.4%	4.2	72.8%	-1.7	\$142.36	-11.5%	\$147.04	-5.7%	\$78.88	-4.2%	\$106.99	-7.8%
Yukon	55.5%	-2.0	56.6%	-0.6	\$118.28	2.3%	\$116.33	2.4%	\$65.67	-1.2%	\$65.85	1.4%
Canada	61.7%	0.9	57.3%	1.4	\$141.01	3.3%	\$140.18	2.6%	\$86.93	4.7%	\$80.29	5.2%

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

[^] Percentage points.

¹ Excluding Alberta resorts.

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

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- The National Occupancy Rate inched up by a marginal 0.9 points year-over-year in April 2017, currently sitting at 61.7% and bringing the year-to-date occupancy rate up to 57.3%, up 1.4 points over the same period in 2016.
- In April 2017, the highest occupancy rates were observed in British Columbia (67.5%), Ontario (66.3%), and Manitoba (64.5%). Year-to-date, Manitoba (63.5%) and British Columbia (62.5%) were also top performers, but Northwest Territories (72.8%) took the top spot.
- British Columbia, Quebec, and Ontario recorded the highest average daily rates (ADR) and revenue per available room (RevPar) in April 2017, with Ontario in particular recording the strongest year-over-year growth on both measures. British Columbia and Quebec were also top performers on both measures year-to-date, along with Northwest Territories.
- Ongoing year-over-year declines across accommodation measures continued to present challenges for several provinces and territories, including Saskatchewan and Northwest Territories. Alberta's ADR continued to fall, but there are signs of improvement in occupancy rate and RevPar.

ACCOMMODATION

Hotel Performance Indicators by Property Type

	Occupancy Rates				Average Daily Rate (ADR)			
	Apr. 2017	YOY^ Change	Jan.- Apr.	YOY^ Variance	Apr. 2017	YOY Variance	Jan.- Apr.	YOY Variance
Property Size								
Under 50 rooms	45.0%	0.7	42.5%	2.0	\$101.99	3.8%	\$102.74	3.1%
50-75 rooms	53.6%	0.6	49.8%	1.3	\$106.69	0.8%	\$106.29	0.8%
76-125 rooms	59.1%	0.5	55.3%	1.6	\$122.11	2.0%	\$121.31	0.8%
126-200 rooms	63.7%	0.8	58.5%	1.3	\$131.23	3.6%	\$130.03	3.2%
201-500 rooms	66.0%	0.8	61.2%	0.9	\$164.65	3.4%	\$164.15	3.1%
Over 500 rooms	70.5%	2.7	66.0%	2.4	\$198.46	5.8%	\$196.81	5.5%
Total	61.7%	0.9	57.3%	1.4	\$141.01	3.3%	\$140.18	2.6%
Property Type								
Limited Service	55.5%	0.4	51.8%	1.6	\$111.22	2.0%	\$110.30	1.2%
Full Service	65.5%	0.6	59.7%	1.1	\$153.29	3.3%	\$148.39	3.0%
Suite Hotel	73.2%	2.2	67.6%	1.5	\$146.04	2.7%	\$145.59	1.7%
Resort	51.9%	4.4	58.0%	2.6	\$190.86	8.6%	\$221.71	6.5%
Total	61.7%	0.9	57.3%	1.4	\$141.01	3.3%	\$140.18	2.6%
Price Level								
Budget	55.5%	1.7	50.3%	2.1	\$94.39	4.8%	\$92.70	4.5%
Mid-Price	62.6%	0.2	58.1%	1.0	\$135.73	2.3%	\$133.44	1.9%
Upscale	66.2%	2.4	63.5%	2.0	\$221.88	4.7%	\$224.31	3.7%
Total	61.7%	0.9	57.3%	1.4	\$141.01	3.3%	\$140.18	2.6%

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

- Consistent with past trends, both occupancy rate and ADR increased with the size of the property, with the largest properties (500+ rooms) reporting the highest occupancy rates (70.5% in April, 66.0% YTD) and average daily rates (\$198.46 in April, \$196.81 YTD). These larger properties also noted the strongest year-over-year growth on both measures, both in April and year-to-date in 2017.
- Suite hotels continued to record the highest occupancy rates (73.2% in April, 67.6% YTD), though resorts recorded stronger year-over-year growth on this measure. Resorts also reported the highest ADR (\$190.86 in April, \$221.71 YTD), as well as the strongest year-over-year growth, though all property types observed relatively strong growth in ADR over this period.
- Upscale properties continued to report the highest occupancy rates (66.2% in April, 63.5% YTD) and ADR (\$221.88 in April, \$224.31 YTD), though again a positive trend in ADR was observed across all price levels.