



# Tourism Snapshot

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

**December 2018**  
Volume 14, Issue 12



Canada

[www.destinationcanada.com](http://www.destinationcanada.com)

# KEY HIGHLIGHTS

## IMPORTANT NOTE REGARDING THE FRONTIER COUNTS DATA:

**Revised 2017 Frontier Counts:** With this release, the 2017 frontier counts, which were previously partly modelled for YVR, YOW, YYZ T3, and YEG, have now been revised. The revised 2017 data is based on the same air administrative data from CBSA as the 2018 data. With these revisions, 2017 overnight arrivals increased by 89,100, which raised the 2017 record setting mark to 20,883,164 (+4.6%) overnight visitors. While the upward revisions in 2017 arrivals by market did not alter arrival levels in 2018, it did result in changes to year-over-year growth rates.

**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. Overnight arrivals by land ports accounted for 10.1% of total long-haul international visitors to Canada in 2018.

- In 2018, international overnight arrivals to Canada surpassed the record level previously achieved in 2017 (20.88 million) by 1.2% to reach a new all-time high of 21.13 million, breaking the 21 million mark for the first time.
- US visitors (14.44 million, +1.4%) continued to make up the majority of tourism arrivals to Canada in 2018. The positive performance from this key market was driven by steady growth in auto arrivals (8.18 million, +2.4%), which are the largest source of overnight visitors to Canada, making up 56.7% of US arrivals in 2018. Combined with increased arrivals by other modes of transport such as bus, train, and cruise (+10.1%), they outpaced declining air arrivals (-3.1%) in 2018.
- Overnight arrivals from the US established a new peak for the month of December in 2018, surpassing the 2002 record.
- While total arrivals from Destination Canada's nine long-haul markets in 2018 remained on par with 2017, several key markets reached new milestones this year. China, France, and Mexico surpassed the 700K, 600K, and 400K marks, respectively, for annual visitors to Canada for the first time in 2018. Meanwhile, India climbed to our 7<sup>th</sup> largest inbound market.
- With global economic and political uncertainties weighing on arrival performances from Destination Canada's long-haul markets in 2018 (+0.0%), growth in air arrivals direct from overseas (+3.7%) largely offset declines in cruise (-2.8%) and air arrivals via the US (-17.3%). Most impacted by uncertainties were arrivals from UK (Brexit), Australia, Japan and South Korea (global economic slowdown) and to a lesser extent China and Germany. France, Mexico and India stood in contrast by their robust performances with air arrivals direct from overseas expanding at double-digit paces.
- December 2018 marked the third consecutive month of decline in arrivals by air direct from overseas. The slowing momentum in international arrivals to Canada over the 4th quarter of 2018 aligns with the UNWTO's global confidence level showing signs of slowing down in the last months of 2018.

<sup>1</sup> Note the caveat from Statistics Canada associated with the December 2018 data, available [here](#).

## QUICK LINKS

## Industry Performance Dashboard

	Dec. 2018	YTD
<b>✈ Overnight Arrivals<sup>1</sup></b>		
Total International	↑ 2.0%	↑ 1.2%
10 DC Markets*	↑ 2.0%	↑ 1.1%
<i>United States</i>	↑ 2.4%	↑ 1.4%
<i>9 Long-Haul Markets</i>	↑ 0.7%	0.0%
Non-DC Markets	↑ 2.0%	↑ 2.2%
<b>✈ Air Seat Capacity<sup>2</sup></b>		
Total International	↑ 6.0%	↑ 6.0%
10 DC Markets*	↑ 5.5%	↑ 5.3%
Non-DC Markets	↑ 6.9%	↑ 7.8%
<b>🏠 National Hotel Indicators<sup>3</sup></b>		
Occupancy Rate*	↑ 0.7	↑ 0.7
Revenue Per Available Room (Revpar)	↑ 3.2%	↑ 4.5%
Average Daily Rate (ADR)	↑ 4.4%	↑ 5.6%

**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](http://www.cbre.ca).

# MARKET MONITOR SUMMARY

	Market	Overnight Arrivals <sup>i</sup>		Arrival YOY Variations (%)		Air Seat capacity <sup>ii</sup>		Local currency vs. CAD <sup>iii</sup>	
		Dec. 2018	YTD 2018	Dec. 2018	YTD 2018	Dec. 2018	YTD 2018	Dec. 2018 Average	YTD Average
DC North America	United States	944,198	14,440,353	2.4%	1.4%	7.1%	4.9%	5.2%	-0.1%
	Mexico	40,996	404,402	6.3%	4.9%	6.1%	34.5%	0.1%	-1.9%
DC Europe	France	41,014	604,166	2.3%	4.7%	3.1%	9.5%	1.2%	4.5%
	Germany	14,585	405,984	-4.7%	1.1%	10.2%	3.2%	1.2%	4.5%
	United Kingdom	51,860	791,550	-1.0%	-3.3%	-4.6%	0.7%	-0.6%	3.5%
DC Asia-Pacific	Australia	37,485	348,984	4.3%	-2.5%	0.2%	12.4%	-1.3%	-2.6%
	China	41,497	737,379	6.3%	6.1%	2.0%	6.3%	0.8%	2.1%
	India	17,855	287,416	5.0%	14.7%	-2.0%	19.8%	-4.6%	-4.8%
	Japan	14,854	251,235	-12.1%	-14.9%	3.1%	-4.0%	5.8%	1.4%
	South Korea	12,688	245,757	-19.8%	-16.4%	-1.0%	-0.6%	1.6%	2.6%
<b>Total 10 DC Markets</b>		<b>1,217,032</b>	<b>18,517,226</b>	<b>2.0%</b>	<b>1.1%</b>				
<b>Rest of the World</b>		<b>185,626</b>	<b>2,616,627</b>	<b>2.0%</b>	<b>2.2%</b>				
<b>Total International</b>		<b>1,402,658</b>	<b>21,133,853</b>	<b>2.0%</b>	<b>1.2%</b>				

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:

**+2.4% ↑ YOY**



YTD:

**+1.4% ↑ YOY**

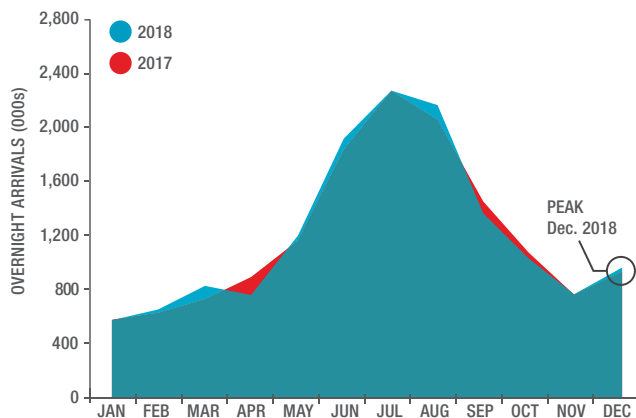
## Overnight Arrivals

	December 2018		YTD 2018	
	Arrivals	% YOY Variance	Arrivals	% YOY Variance
Automobile	564,766	6.2	8,183,103	2.4
Air	338,496	-2.3	4,591,876	-3.1
Other	40,936	-6.1	1,665,374	10.1
<b>US Total</b>	<b>944,198</b>	<b>2.4</b>	<b>14,440,353</b>	<b>1.4</b>

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

<b>Air Seat Capacity<sup>i</sup></b>	December 2018	7.1%
	YTD	4.9%
<b>Exchange Rate<sup>ii</sup></b>	December 2018	5.2%
	YTD	-0.1%
<b>Consumer Confidence Index (1985=100)<sup>iii</sup></b>	December 2018	126.6
	Previous Month	136.4
<b>YTD Arrival Peak<sup>iv</sup></b>	Peak Year	2002
	Current % of Previous Peak	89.3%

Source:

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

ii. Bank of Canada, Year-on-year % Variance

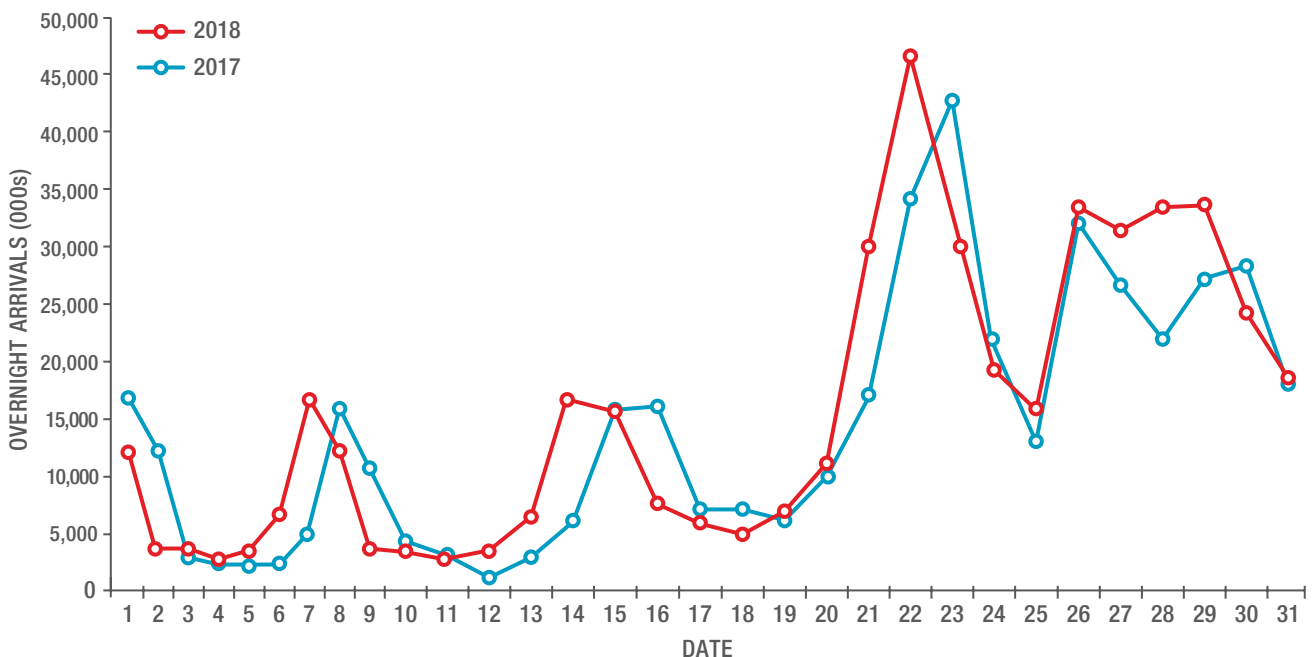
iii. Consumer Confidence Index, the Conference Board (USA)

iv. Statistics Canada, Frontier Counts, Custom Tabulations.

# UNITED STATES

- Canada welcomed 944,000 visitors from the US in December 2018, a new record peak for the month of December. This brought 2018 annual arrivals up to 14.44 million, up 1.4% over 2017 and the highest level recorded since 2004.
- This annual growth was driven primarily by the 8.18 million US auto arrivals in 2018 (+2.4%), which were the largest source of overnight visitors to Canada, making up 56.7% of US arrivals in 2018. US arrivals by other modes of transport such as bus, train, and cruise also recorded a notable increase in 2018 (+10.1%).
- Daily US auto arrivals data (based on IPIL daily arrivals estimates) indicated that many of the monthly shifts in US arrivals throughout 2018 resulted from small differences in holiday/long weekend dates influencing drive traffic.
- Throughout 2018, the largest proportions of US auto arrivals came from New York (17.3%), Washington (15.1%) and Michigan (10.9%). Though they accounted for a smaller proportion of total US auto arrivals, several states further from the US-Canada border recorded double-digit increases in 2018, including Tennessee (+25.8%), Arkansas (+21.9%), Florida (+14.3%), Missouri (+12.7%), and Virginia (+10.6%). Auto arrivals from Idaho also saw a similar increase (+19.6%).
- US air arrivals began to decline year-over-year in April 2018 and continued to fall through the rest of the year, bringing total annual US air arrivals down to 4.59 million (-3.1%). At the same time, air capacity between Canada and the United States expanded in 2018 (+4.9%), indicating that Canadians returning from the US occupied an increasing share of available seats.
- Overall in 2018 the strength of the USD in was on par with 2017 (-0.1%), recovering in the second half of 2018 following a weaker start to the year.
- Following four consecutive months of growth, the consumer confidence index published by the US Conference Board took a turn at the end of 2018, falling 1.5 points to 136.4 in November, coinciding with the US midterm election, and dropping another 9.8 points to 126.6 in December, coinciding with the start of the partial government shutdown.

## Daily US Overnight Auto Arrivals – December 2018



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

# MEXICO

## Mexico Arrivals to Canada

**CURRENT MONTH:**  
**+6.3% ↑ YOY**



**YTD:**  
**+4.9% ↑ YOY**

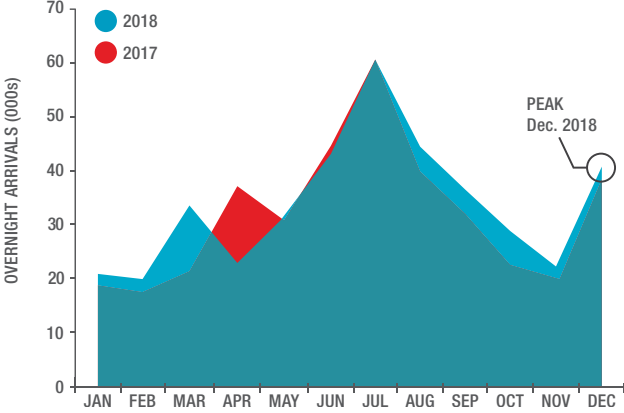
### Overnight Arrivals

	December 2018		YTD 2018	
	Arrivals	% YOY Variance	Arrivals	% YOY Variance
Mexico	40,996	6.3	404,402	4.9

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 <sup>i</sup>	December 2018	6.1%
	YTD	34.5%
Exchange Rate <sup>ii</sup>	December 2018	0.1%
	YTD	-1.9%
YTD Arrival Peak <sup>iii</sup>	Peak Year	2017
	Current % of Previous Peak	104.9%

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

- With a record 41,000 visitors in December 2018 (+6.3%), Mexico marked six consecutive months of record arrivals and five consecutive months of leading Destination Canada's international markets in arrivals growth in the second half of 2018. This followed an apparent slowdown mid-year, indicating a continuing positive trend after the initial progress following the replacement of the visa requirement for Mexican citizens with the eTA in December 2016.
- Annual 2018 arrivals from Mexico reached 404,000 (+4.9%, an additional 19,000 visitors over 2017), not only setting a new record, but also surpassing the 400,000 mark for the first time. With this exceptional 2018 performance, Mexico approached a similar number of annual visitors to Canada as Germany.
- While the strength of the Mexican Peso in Canada in 2018 was down slightly compared to 2017 (-1.9%), consumer confidence was high in the second half of the year, which may have contributed to the positive performance from this market in 2018. Air capacity between Mexico City and Canada also expanded by 34.5% in 2018, which supported strong direct air arrivals. This was the greatest increase in air capacity to Canada of all Destination Canada's international markets.

## Mexico Arrivals by Port of Entry

- The positive performance from Mexico in 2018 was primarily driven by increased direct air arrivals (302,000), which grew by 16.6% year-over-year and accounted for 74.6% of total arrivals from this market. Arrivals by sea (which are mostly via the US) also increased year-over-year (+5.3%). By contrast, arrivals via the US by land (-30.1%) and by air (-16.8%) declined significantly in 2018.
- Of the three quarters of visitors from Mexico who flew directly to Canada in 2018, most flew into YYZ (42.5%), YVR (32.2%), or YUL (20.5%), with just 3.9% flying into YYC and 0.9% into other Canadian airports.

## Year-to-date Arrivals by Port of Entry

			Mexico
Air Arrivals from Overseas	YYZ	Arrivals	128,278
		YOY%	7.9%
		<b>% of Total</b>	<b>31.7%</b>
	YVR	Arrivals	97,136
		YOY%	40.7%
		<b>% of Total</b>	<b>24.0%</b>
	YUL	Arrivals	61,747
		YOY%	5.2%
		<b>% of Total</b>	<b>15.3%</b>
	YYC	Arrivals	11,742
		YOY%	16.7%
		<b>% of Total</b>	<b>2.9%</b>
	All other airports	Arrivals	2,746
		YOY%	41.0%
		<b>% of Total</b>	<b>0.7%</b>
Subtotal	Arrivals	301,649	
	YOY%	16.6%	
	<b>% of Total</b>	<b>74.6%</b>	
Air Arrivals via the US	All airports	Arrivals	59,259
		YOY%	-16.8%
		<b>% of Total</b>	<b>14.7%</b>
Sea Arrivals	All sea borders	Arrivals	13,585
		YOY%	5.3%
		<b>% of Total</b>	<b>3.4%</b>
Land Arrivals via US	All land borders	Arrivals	29,909
		YOY%	-30.1%
		<b>% of Total</b>	<b>7.4%</b>
<b>Total Overnight Arrivals</b>			<b>404,402</b>

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:

**-0.3% ↓ YOY**



YTD:

**+0.3% ↑ YOY**

## Overnight Arrivals

	December 2018		YTD 2018	
	Arrivals	% YOY Variance	Arrivals	% YOY Variance
<b>DC Europe</b>	<b>107,459</b>	<b>-0.3</b>	<b>1,801,700</b>	<b>0.3</b>
United Kingdom	51,860	-1.0	791,550	-3.3
France	41,014	2.3	604,166	4.7
Germany	14,585	-4.7	405,984	1.1
<b>Other Europe</b>	<b>59,503</b>	<b>-4.4</b>	<b>1,044,619</b>	<b>-1.9</b>
Italy	5,585	-14.7	118,979	-9.1
Netherlands	5,869	-9.9	136,566	-5.3
Spain	3,746	-21.4	90,056	-1.9
Switzerland	8,034	11.2	123,702	-1.0
Rest of Europe	36,269	-2.5	575,316	0.5
<b>Total Europe</b>	<b>166,962</b>	<b>-1.8</b>	<b>2,846,319</b>	<b>-0.5</b>



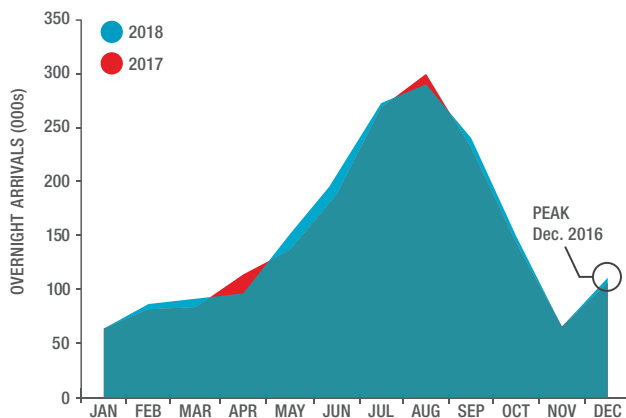
Source: Statistics Canada, Frontier counts, custom tabulations  
 Note: The figures are preliminary estimates and are subject to change.

## DC Europe: Key Indicators

		France	Germany	United Kingdom
<b>Air Seat Capacity<sup>i</sup></b>	Dec. 2018	3.1%	10.2%	-4.6%
	YTD	9.5%	3.2%	0.7%
<b>Exchange Rate<sup>ii</sup></b>	Dec. 2018	1.2%	1.2%	-0.6%
	YTD	4.5%	4.5%	3.5%
<b>YTD Arrival Peak<sup>iii</sup></b>	Peak Year	2017	1996	2007
	Current % of Previous Peak	104.7%	89.5%	87.1%

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

## Trend Plot: Total DC Europe Arrivals



## EUROPE

- In December 2018, over 107,000 travellers from Destination Canada's Europe region visited Canada, almost on par with the same month a year ago (-0.3%), and below the 2016 peak for the month of December. This brought annual 2018 arrivals from this region just marginally ahead of 2017 (+0.3%), to reach a new record of 1.80 million.
- France led this region in 2018, setting seven new monthly arrivals records, including December (41,000 visitors, +2.3%), which contributed to record annual arrivals in 2018 (604,000), outperforming the previous record set in 2017 by 4.7%. Annual arrivals from France also surpassed the 600K mark for the first time in 2018.
- After a generally positive year, arrivals from Germany declined for three consecutive months at the end of 2018, resulting in annual arrivals just above 2017 levels (406,000, +1.1%). The subdued performance was most apparent in decreased air arrivals via the US (-19.4%), as arrivals by all other modes of entry increased overall in 2018. Overall 2018 arrivals from Germany were the highest recorded since the 1996 peak.
- The UK was the only market from Destination Canada's Europe region to record a decline in annual arrivals in 2018 (-3.3%). However, despite this slight downward trend, the UK held the top spot as Destination Canada's largest long-haul market in 2018.
- In 2018, the purchasing power of the Euro (+4.5% compared to 2017) and British pound (+3.5%) relative to the Canadian dollar helped position Canada as a more attractive travel destination. Air capacity to Canada from all three markets also expanded in 2018, supporting increased direct air arrivals.

### DC Europe Arrivals by Port of Entry

2018 arrivals from Destination Canada's Europe region were mainly held back by falling air arrivals via the US (-25.6%), with all three key markets in the region registering declines, while direct air arrivals (+4.2%) and land arrivals via the US (+24.4%) increased. Arrivals by sea from this region were nearly on par with 2017 (-0.4%).

### Year-to-date Arrivals by Port of Entry

		France	Germany	UK	
Air Arrivals from Overseas	YYZ	Arrivals	57,380	109,978	278,673
		YOY%	-20.2%	-2.8%	-6.6%
		<b>% of Total</b>	<b>9.5%</b>	<b>27.1%</b>	<b>35.2%</b>
	YVR	Arrivals	23,852	74,213	149,489
		YOY%	40.5%	5.4%	1.5%
		<b>% of Total</b>	<b>3.9%</b>	<b>18.3%</b>	<b>18.9%</b>
	YUL	Arrivals	355,527	47,614	52,711
		YOY%	21.4%	11.8%	1.0%
		<b>% of Total</b>	<b>58.8%</b>	<b>11.7%</b>	<b>6.7%</b>
	YYC	Arrivals	3,162	24,257	68,636
		YOY%	-13.2%	5.7%	-2.9%
		<b>% of Total</b>	<b>0.5%</b>	<b>6.0%</b>	<b>8.7%</b>
	All other airports	Arrivals	16,278	21,393	42,708
		YOY%	169.4%	-2.5%	4.3%
		<b>% of Total</b>	<b>2.7%</b>	<b>5.3%</b>	<b>5.4%</b>
Subtotal	Arrivals	456,199	277,455	592,217	
	YOY%	16.5%	2.4%	-2.8%	
	<b>% of Total</b>	<b>75.5%</b>	<b>68.3%</b>	<b>74.8%</b>	
Air Arrivals via the US	All airports	Arrivals	95,547	46,050	92,226
		YOY%	-37.0%	-19.4%	-12.7%
		<b>% of Total</b>	<b>15.8%</b>	<b>11.3%</b>	<b>11.7%</b>
Sea Arrivals	All sea borders	Arrivals	1,857	32,290	44,382
		YOY%	-20.4%	3.1%	-1.9%
		<b>% of Total</b>	<b>0.3%</b>	<b>8.0%</b>	<b>5.6%</b>
Land Arrivals via US	All land borders	Arrivals	50,563	50,189	62,725
		YOY%	59.9%	19.8%	8.4%
		<b>% of Total</b>	<b>8.4%</b>	<b>12.4%</b>	<b>7.9%</b>
<b>Total Overnight Arrivals</b>		<b>604,166</b>	<b>405,984</b>	<b>791,550</b>	

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

# ASIA-PACIFIC

## DC Asia-Pacific Arrivals to Canada

CURRENT MONTH:

**-0.3% ↓ YOY**

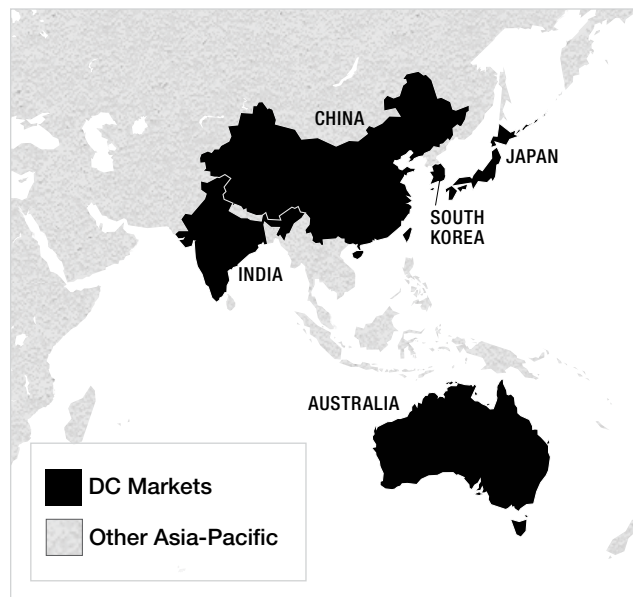


YTD:

**-1.2% ↓ YOY**

## Overnight Arrivals

	December 2018		YTD 2018	
	Arrivals	% YOY Variance	Arrivals	% YOY Variance
<b>DC Asia-Pacific</b>	<b>124,379</b>	<b>-0.3</b>	<b>1,870,771</b>	<b>-1.2</b>
Australia	37,485	4.3	348,984	-2.5
China	41,497	6.3	737,379	6.1
India	17,855	5.0	287,416	14.7
Japan	14,854	-12.1	251,235	-14.9
South Korea	12,688	-19.8	245,757	-16.4
<b>Other Asia-Pacific</b>	<b>61,146</b>	<b>3.4</b>	<b>853,200</b>	<b>3.5</b>
Hong Kong	12,384	-1.5	154,298	-3.7
Taiwan	6,565	3.8	129,178	12.5
Rest of Asia-Pacific	42,197	4.8	569,724	3.7
<b>Total Asia-Pacific</b>	<b>185,525</b>	<b>0.9</b>	<b>2,723,971</b>	<b>0.2</b>

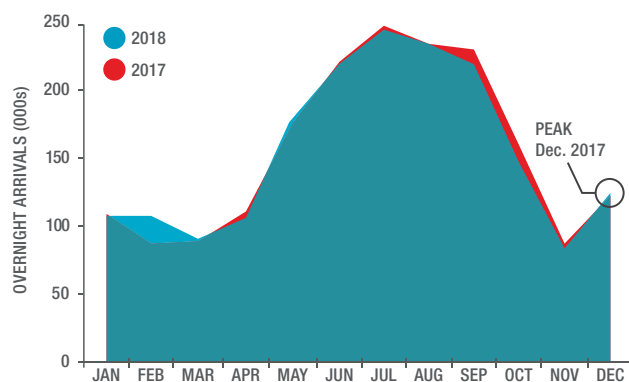


Source: Statistics Canada, Frontier counts, custom tabulations  
 Note: The figures are preliminary estimates and are subject to change.

## Asia-Pacific: Key Indicators

		Australia	China	India	Japan	South Korea
Air Seat Capacity <sup>i</sup>	Dec. 2018	0.2%	2.0%	-2.0%	3.1%	-1.0%
	YTD	12.4%	6.3%	19.8%	-4.0%	-0.6%
Exchange Rate <sup>ii</sup>	Dec. 2018	-1.3%	0.8%	-4.6%	5.8%	1.6%
	YTD	-2.6%	2.1%	-4.8%	1.4%	2.6%
YTD Arrival Peak <sup>iii</sup>	Peak Year	2017	2017	2017	1996	2017
	Current % of Previous Peak	97.5%	106.1%	114.7%	38.6%	83.6%

## 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.

## ASIA-PACIFIC

- In December 2018, arrivals from Destination Canada's Asia-Pacific region were almost on par but just below December 2017 (124,000, -0.3%). This marked seven consecutive months of declining arrivals from this region, bringing annual 2018 arrivals to 1.87 million (-1.2%). While 2018 arrivals were slightly below the record-setting 2017 levels, Destination Canada's Asia-Pacific region remained Canada's largest source of long-haul arrivals.
- China posted an exceptional performance in 2018, setting monthly arrivals peaks for 10 of 12 months, and a new annual record that surpassed 700,000 visitors for the first time (737,000, +6.1%). Just behind the UK, China remained Canada's second largest long-haul market in 2018.
- Arrivals from the emerging market of India were also outstanding in 2018, setting new monthly records for all 12 months and for the year (287,000 visitors), while leading the Asia-Pacific region in year-over-year growth (+14.7%). Annual arrivals also reached a new milestone in 2018, surpassing annual arrivals from Japan for the first time.
- Amid economic uncertainties and wavering consumer confidence, three of Destination Canada's key markets in the Asia-Pacific region recorded declines in arrivals to Canada in 2018. Japan (-14.9%) and South Korea (-16.4%) saw particularly notable drops, especially in air arrivals (both direct and via the US), as direct air capacity to Canada also retracted from both markets. Australia saw a smaller drop in 2018 (-2.5%), with fewer arrivals via the US by air, cruise, and by land. Direct air arrivals were still ahead of 2017 (+6.0%), in line with expanded air capacity (+12.4%).

### DC Asia-Pacific Arrivals by Port of Entry

- In 2018, direct air arrivals from Destination Canada's Asia-Pacific region were marginally ahead of 2017 (+0.3%), along with land arrivals via the US (+5.9%). The decline came primarily from fewer air arrivals via the US (-10.0%) and sea arrivals (-6.3%).
- It is important to note that Statistics Canada advises caution in interpreting land port arrival levels, as these figures may have been impacted by changes in data collection processes in 2018.

### Year-to-date Arrivals by Port of Entry

		Australia	China	India	Japan	South Korea	
Air Arrivals from Overseas	YYZ	Arrivals	15,450	217,773	133,021	47,732	53,258
		YOY%	-14.7%	1.1%	10.0%	-36.0%	-17.0%
		% of Total	4.4%	29.5%	46.3%	19.0%	21.7%
	YVR	Arrivals	125,621	280,816	59,727	105,729	75,362
		YOY%	9.5%	4.9%	62.5%	-10.7%	-11.4%
		% of Total	36.0%	38.1%	20.8%	42.1%	30.7%
	YUL	Arrivals	2,887	40,608	7,801	10,904	1,125
		YOY%	4.7%	9.1%	-20.4%	521.7%	9.1%
		% of Total	0.8%	5.5%	2.7%	4.3%	0.5%
	YYC	Arrivals	1,539	11,074	10,822	12,047	997
		YOY%	0.9%	-15.6%	19.7%	-26.2%	-44.1%
		% of Total	0.4%	1.5%	3.8%	4.8%	0.4%
All other airports	Arrivals	880	573	2,455	243	153	
	YOY%	-6.4%	-16.8%	-8.1%	10.5%	-11.0%	
	% of Total	0.3%	0.1%	0.9%	0.1%	0.1%	
Subtotal	Arrivals	146,377	550,844	213,826	176,655	130,895	
	YOY%	6.0%	3.2%	19.3%	-16.4%	-14.0%	
	% of Total	41.9%	74.7%	74.4%	70.3%	53.3%	
Air Arrivals via the US	All airports	Arrivals	123,236	80,888	37,375	46,034	29,066
		YOY%	-8.1%	-9.7%	13.1%	-20.8%	-21.2%
		% of Total	35.3%	11.0%	13.0%	18.3%	11.8%
Sea Arrivals	All sea borders	Arrivals	43,959	12,186	10,863	5,028	5,340
		YOY%	-7.9%	-20.1%	12.7%	14.3%	-3.2%
		% of Total	12.6%	1.7%	3.8%	2.0%	2.2%
Land Arrivals via US	All land borders	Arrivals	35,412	93,461	25,352	23,518	80,456
		YOY%	-6.8%	66.0%	-11.7%	9.0%	-18.9%
		% of Total	10.1%	12.7%	8.8%	9.4%	32.7%
<b>Total Overnight Arrivals</b>		<b>348,984</b>	<b>737,379</b>	<b>287,416</b>	<b>251,235</b>	<b>245,757</b>	

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

# CANADIAN OUTBOUND TRAVEL

## Overnight Trips by Canadians

	December 2018	YOY % Variance	Jan. – Dec. 2018	YOY % Variance
United States	1,499,714	5.4	21,475,161	4.8
Other Countries	954,625	4.9	11,965,154	-2.2
<b>Total Trips from Canada</b>	<b>2,454,339</b>	<b>5.2</b>	<b>33,440,315</b>	<b>2.2</b>

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

- Canadians travelled more internationally at the end of 2018 than they did a year ago, with December 2018 outbound trips (2.45 million) up 5.2% year-over-year. Trips to the US (+5.4%) increased at a slightly faster pace than trips to other international destinations (+4.9%).
- Overall in 2018, Canadians travelled more than they did in 2017, recording 33.44 million international trips throughout the year (+2.2% over 2017). This growth in outbound travel came primarily from more trips to the US (+4.8%), as trips to other international destinations declined (-2.2%).
- In particular, Canadians drove (10.95 million trips, +2.3%) and flew (9.59 million trips, +8.9%) to the US more in 2018, while taking fewer trips by other modes of transport (941,000 trips, -4.5%).

# INTERNATIONAL ARRIVALS BY PROVINCE OF ENTRY

## Overnight Arrivals by Province of Entry January to December 2018

		Newfoundland and Labrador	Prince Edward Island	Nova Scotia	New Brunswick	Québec	Ontario
Total One or more nights	2018	58,784	321	263,761	350,116	3,218,918	9,607,317
	Variance YOY%	-14.6%	-92.6%	6.2%	-0.9%	2.7%	-2.5%
	Change YOY	-10,037	-4,000	15,407	-3,149	84,125	-245,359
US Residents by Automobile	2018	0	0	17,139	251,604	1,119,790	4,376,477
	Variance YOY%	0.0%	0.0%	18.5%	0.2%	2.1%	2.1%
	Change YOY	-	-	2,676	403	23,204	90,437
US Residents by Non-Automobile	2018	13,013	294	155,244	78,347	871,524	2,461,420
	Variance YOY%	-7.9%	-92.2%	2.0%	-11.4%	0.6%	-8.1%
	Change YOY	-1,123	-3,467	3,100	-10,073	5,178	-217,430
Residents from Other Countries	2018	45,771	27	91,378	20,165	1,227,604	2,769,420
	Variance YOY%	-16.3%	-95.2%	11.8%	47.8%	4.8%	-4.1%
	Change YOY	-8,914	-533	9,631	6,521	55,743	-118,366

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

## Overnight Arrivals by Province of Entry January to December 2018

		<i>Manitoba</i>	<i>Saskatchewan</i>	<i>Alberta</i>	<i>British Columbia</i>	<i>Yukon</i>	<i>Nunavut</i>	<i>CANADA</i>
<b>Total One or more nights</b>	2018	236,586	85,079	1,076,368	6,057,835	176,498	2,270	<b>21,133,853</b>
	Variance YOY%	7.4%	7.6%	0.9%	6.4%	10.7%	56.9%	<b>1.2%</b>
	Change YOY	16,363	6,021	9,504	363,989	17,002	823	<b>250,689</b>
<b>US Residents by Automobile</b>	2018	151,690	60,126	162,513	1,951,658	92,106	0	<b>8,183,103</b>
	Variance YOY%	5.7%	3.7%	2.6%	3.2%	2.9%	0.0%	<b>2.4%</b>
	Change YOY	8,172	2,125	4,180	61,195	2,585	-	<b>194,977</b>
<b>US Residents by Non-Automobile</b>	2018	70,033	22,330	592,599	1,927,950	64,407	89	<b>6,257,250</b>
	Variance YOY%	3.6%	19.8%	1.9%	11.3%	29.8%	8.5%	<b>0.1%</b>
	Change YOY	2,409	3,697	11,239	195,369	14,787	7	<b>3,693</b>
<b>Residents from Other Countries</b>	2018	14,863	2,623	321,256	2,178,227	19,985	2,181	<b>6,693,500</b>
	Variance YOY%	63.7%	8.2%	-1.8%	5.2%	-1.8%	59.8%	<b>0.8%</b>
	Change YOY	5,782	199	-5,915	107,425	-370	816	<b>52,019</b>

# ACCOMMODATION

## Hotel Performance Indicators by Province

	Occupancy Rates				Average Daily Rate (ADR)				Revenue Per Available Room (RevPAR)			
	Dec. 2018	YOY <sup>^</sup> Variance	Jan.-Dec	YOY <sup>^</sup> Variance	Dec. 2018	YOY % Variance	Jan.-Dec	YOY % Variance	Dec. 2018	YOY % Variance	Jan.-Dec	YOY % Variance
<b>Alberta<sup>1</sup></b>	42.2%	0.9	55.9%	2.2	\$121.64	-0.7%	\$130.91	0.7%	\$51.34	1.5%	\$73.20	4.9%
<b>British Columbia</b>	55.8%	1.5	70.8%	0.7	\$181.59	4.8%	\$188.36	8.9%	\$101.29	7.6%	\$133.38	10.1%
<b>Saskatchewan</b>	42.9%	1.3	56.9%	2.7	\$113.31	-0.2%	\$117.84	-1.3%	\$48.59	3.0%	\$67.04	3.7%
<b>Manitoba</b>	54.2%	0.9	69.0%	0.5	\$120.86	2.1%	\$125.22	1.5%	\$65.45	3.7%	\$86.43	2.3%
<b>Ontario</b>	52.5%	-0.7	70.0%	0.8	\$146.89	3.6%	\$162.04	4.7%	\$77.08	2.3%	\$113.47	5.8%
<b>Quebec</b>	55.9%	0.6	69.2%	-1.1	\$171.48	5.0%	\$173.19	3.0%	\$95.94	6.2%	\$119.80	1.4%
<b>New Brunswick</b>	37.1%	-2.0	60.6%	0.0	\$114.12	2.4%	\$125.38	3.3%	\$42.38	-2.9%	\$76.04	3.2%
<b>Nova Scotia</b>	42.1%	-1.3	66.5%	-0.7	\$123.04	0.8%	\$148.79	5.4%	\$51.86	-2.2%	\$98.90	4.3%
<b>Newfoundland</b>	33.7%	-2.4	53.2%	-9.2	\$116.35	-10.4%	\$140.10	-3.4%	\$39.26	-16.5%	\$74.52	-17.7%
<b>Prince Edward Island</b>	27.9%	-3.8	57.3%	-0.7	\$107.17	0.0%	\$152.49	5.2%	\$29.86	-12.1%	\$87.30	4.0%
<b>Northwest Territories</b>	68.4%	-2.4	70.8%	-0.9	\$145.52	-1.3%	\$148.99	4.6%	\$99.52	-4.6%	\$105.54	3.3%
<b>Yukon</b>	43.9%	2.7	64.5%	-0.4	\$114.97	-3.8%	\$142.75	7.5%	\$50.48	2.5%	\$92.08	6.8%
<b>Canada</b>	<b>50.2%</b>	<b>0.2</b>	<b>66.2%</b>	<b>0.7</b>	<b>\$152.08</b>	<b>3.2%</b>	<b>\$162.15</b>	<b>4.4%</b>	<b>\$76.28</b>	<b>3.5%</b>	<b>\$107.37</b>	<b>5.5%</b>

Note: Based on the operating results of 245,367 rooms (unweighted data)

<sup>^</sup> Percentage points.

<sup>1</sup> Excluding Alta Resorts.

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- In December 2018, the National Occupancy Rate was on par with the same month a year ago (50.2%, up 0.2 percentage points), bringing the annual 2018 rate to 66.2%, up 0.7 points over 2017. Overall in 2018, the highest occupancy rates were recorded in British Columbia (70.8%), Northwest Territories (70.8%) and Ontario (70.0%). About half of the provinces and territories recorded increased occupancy rates or no change compared with 2017, with Saskatchewan (+2.7 points) and Alberta (+2.2 points) leading that growth.
- In 2018, the national average daily rate (ADR) increased substantially over 2017 to reach \$162.15 (+4.4%). Provincially, the highest ADR in 2018 was recorded in the three provinces with the highest international arrivals for the year – British Columbia (\$188.36), Quebec (\$173.19), and Ontario (\$162.04). The strongest year-over-year growth in ADR was observed in British Columbia (+8.9%), Yukon (+7.5%), and Nova Scotia (+5.4%).
- The national revenue per available room (RevPar) climbed to \$107.37 in 2018 (up a notable 5.5% over 2017), with the strongest annual rates observed in British Columbia (\$133.38), Quebec (\$119.80), and Ontario (\$113.47). The biggest gains compared to 2017 were posted in British Columbia (+10.1%), Yukon (+6.8%), and Ontario (+5.8%).



# ACCOMMODATION

## Hotel Performance Indicators by Property Type

	Occupancy Rates				Average Daily Rate (ADR)			
	Dec. 2018	YOY <sup>^</sup> Change	Jan.–Dec.	YOY <sup>^</sup> Variance	Dec. 2018	YOY Variance	Jan.–Dec.	YOY Variance
<b>Property Size</b>								
Under 50 rooms	39.2%	2.1	53.5%	1.0	\$116.47	5.9%	\$119.43	5.4%
50-75 rooms	44.1%	-0.6	60.3%	0.6	\$111.21	2.4%	\$121.79	3.4%
76-125 rooms	47.7%	-0.2	64.4%	0.8	\$125.77	2.2%	\$134.97	3.2%
126-200 rooms	50.2%	0.8	66.5%	0.4	\$136.66	2.2%	\$148.82	4.4%
201-500 rooms	54.2%	-0.4	69.6%	0.7	\$182.57	3.7%	\$192.14	4.8%
Over 500 rooms	59.3%	1.7	74.8%	0.6	\$228.93	5.2%	\$246.36	6.4%
<b>Total</b>	<b>50.2%</b>	<b>0.2</b>	<b>66.2%</b>	<b>0.7</b>	<b>\$152.08</b>	<b>3.2%</b>	<b>\$162.15</b>	<b>4.4%</b>
<b>Property Type</b>								
Limited Service	45.5%	0.1	61.7%	1.0	\$113.35	2.9%	\$122.54	3.8%
Full Service	52.1%	0.3	68.8%	0.7	\$155.56	3.7%	\$176.07	4.8%
Suite Hotel	58.0%	-0.6	73.7%	-0.4	\$160.41	3.5%	\$168.33	5.3%
Resort	53.2%	1.0	63.3%	-0.1	\$325.64	4.4%	\$262.17	7.8%
<b>Total</b>	<b>50.2%</b>	<b>0.2</b>	<b>66.2%</b>	<b>0.7</b>	<b>\$152.08</b>	<b>3.2%</b>	<b>\$162.15</b>	<b>4.4%</b>
<b>Price Level</b>								
Budget	45.0%	0.5	60.6%	1.0	\$98.99	3.5%	\$108.81	5.4%
Mid-Price	49.8%	-0.2	66.7%	0.6	\$136.85	2.4%	\$150.97	3.4%
Upscale	58.3%	1.3	71.5%	0.3	\$260.61	2.3%	\$267.49	5.7%
<b>Total</b>	<b>50.2%</b>	<b>0.2</b>	<b>66.2%</b>	<b>0.7</b>	<b>\$152.08</b>	<b>3.2%</b>	<b>\$162.15</b>	<b>4.4%</b>

Note: Based on the operating results of 245,367 rooms (unweighted data).  
<sup>^</sup> Percentage points.

- In 2018, occupancy rates and ADR generally increased by property size, ranging from 53.5% occupancy and \$119.43 ADR for the smallest properties (<50 rooms) to 74.8% occupancy and \$246.36 ADR for the largest properties (500+ rooms).
- Suite hotels recorded the highest occupancy rates by property type in 2018 (73.7%), despite a marginal decrease year-over-year. The highest ADR in 2018 was found at resorts (\$262.17), which also posted a substantial increase over 2017 (+7.8%).
- Outside of resorts, some of the biggest increases in ADR were posted in major cities, which also had some of the highest occupancy rates. For example, the ADR in downtown Toronto increased by 6.3% and in downtown Vancouver by 11.2%.
- By price level, upscale properties reported the highest occupancy rate (71.5%) and ADR (\$267.49) in 2018.