



# Tourism Snapshot

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

November 2018  
Volume 14, Issue 11

# KEY HIGHLIGHTS

## IMPORTANT NOTE REGARDING THE FRONTIER COUNTS DATA:

Via air arrivals: The November frontier counts released on January 23, 2019 are based on new air administrative data from CBSA. The new data contains important adjustments on performance to date. In year-over-year comparisons, November 2018 data is compared against partly modelled data for YVR, YOW, YYZ T3 and YEG (Additional details below).

Via land arrivals: 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. Overall YTD November 2018, overnight arrivals by land ports accounted for 10.1% of total long-haul international visitors to Canada.

- In November 2018, overnight arrivals of international visitors to Canada edged up by 0.6%, bringing year-to-date arrivals since January 2018 to a new record high of 19.7 million overnight visitors, up 1.7% year-over-year.
- With additional seats available on direct flights to Canada from Destination Canada's long-haul markets (+6.6%), gains in overnight arrivals between January and November 2018 (+1.3%) were largely attributable to increases in the number of visitors arriving by air direct from overseas (+7.1% or 175,000 additional visitors). This trend helped substitute for fewer visitors from these markets arriving by air via the US (-19.7% or 138,000 fewer visitors).
- In November 2018, overnight arrivals from the US expanded by 2.2%, year-over-year, bringing year-to-date US arrivals up to +1.2%. YTD November 2018, lower US arrivals by air were more than offset by increases in auto arrivals (+2.2%) and modes of entries other than auto and air (+10.6%).
- Overnight arrivals from Destination Canada's Asia-Pacific region contracted in November 2018 (-14.4%), as China (+7.4%) was the sole market from this region to post increased arrivals. YTD November 2018, arrivals from this region stood slightly below the same period a year earlier (-1.5%) as gains from China and India did not quite offset steep declines from the other three markets.
- Overnight arrivals from France achieved an 8th consecutive month of growth in November 2018 (+10.3%), which combined with gains from the UK (+6.0%) to counteract a plunge in arrivals from Germany (-22.6%). YTD November 2018, growth in arrivals from Destination Canada's Europe region (+2.4%) was led by France (+5.7%) and Germany (+4.8%).
- YTD November 2018, growth in overnight arrivals from Mexico (+11.4%) was primarily driven by direct air arrivals (+26.7%), which accounted for 75.1% of total arrivals from this market over this period, up from 66.0% a year earlier. Seats on direct flights between Mexico City and Canada increased by 37.8% over that period.

<sup>1</sup>Note the caveat from Statistics Canada associated with the November 2018 data, available here: <https://www150.statcan.gc.ca/n1/daily-quotidien/190123/dq190123c-eng.htm>

## QUICK LINKS

## Industry Performance Dashboard

	Nov 2018	YTD
<b>✈️ Overnight Arrivals<sup>1</sup></b>		
Total International	↑ 0.6%	↑ 1.7%
10 DC Markets*	↑ 0.8%	↑ 1.2%
<i>United States</i>	↑ 2.2%	↑ 1.2%
<i>9 Long-Haul Markets</i>	↓ -5.1%	↑ 1.3%
Non-DC Markets	↓ -1.2%	↑ 5.1%
<b>✈️ Air Seat Capacity<sup>2</sup></b>		
Total International	↑ 6.5%	↑ 6.0%
10 DC Markets*	↑ 5.1%	↑ 5.3%
Non-DC Markets	↑ 9.9%	↑ 7.9%
<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>	
		Nov. 2018	YTD 2018	Nov. 2018	YTD 2018	Nov. 2018	YTD 2018	Nov. 2018 Average	YTD Average
DC North America	United States	770,223	13,496,155	2.2%	1.2%	6.4%	4.7%	3.4%	-0.6%
	Mexico	21,912	363,406	23.0%	11.4%	-3.9%	37.8%	-3.4%	-2.1%
DC Europe	France	23,011	562,952	10.3%	5.7%	5.0%	9.9%	0.1%	4.8%
	Germany	12,395	390,770	-22.6%	4.8%	6.8%	2.8%	0.1%	4.8%
	United Kingdom	30,204	739,669	6.0%	-1.1%	-7.0%	1.1%	0.8%	3.8%
DC Asia-Pacific	Australia	12,604	311,314	-13.6%	-7.9%	22.2%	14.0%	-1.7%	-2.7%
	China	31,270	694,745	7.4%	8.7%	5.0%	6.7%	-1.4%	2.3%
	India	14,158	269,561	-8.7%	14.5%	7.9%	22.6%	-6.5%	-4.9%
	Japan	12,592	234,886	-25.5%	-18.3%	1.2%	-4.5%	2.9%	1.0%
	South Korea	8,855	231,617	-47.1%	-13.8%	3.6%	-0.6%	1.0%	2.6%
<b>Total 10 DC Markets</b>		<b>937,224</b>	<b>17,295,075</b>	<b>0.8%</b>	<b>1.2%</b>				
<b>Rest of the World</b>		<b>129,426</b>	<b>2,430,120</b>	<b>-1.2%</b>	<b>5.1%</b>				
<b>Total International</b>		<b>1,066,650</b>	<b>19,725,195</b>	<b>0.6%</b>	<b>1.7%</b>				

Sources:

- i. Statistics Canada, Frontier counts, custom tabulations
- ii. IATA-Diiio 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 the current month and YTD relative to the same periods in the previous year.

# UNITED STATES

## US Arrivals to Canada

CURRENT MONTH:

**+2.2% ↑ YOY**



YTD:

**+1.2% ↑ YOY**

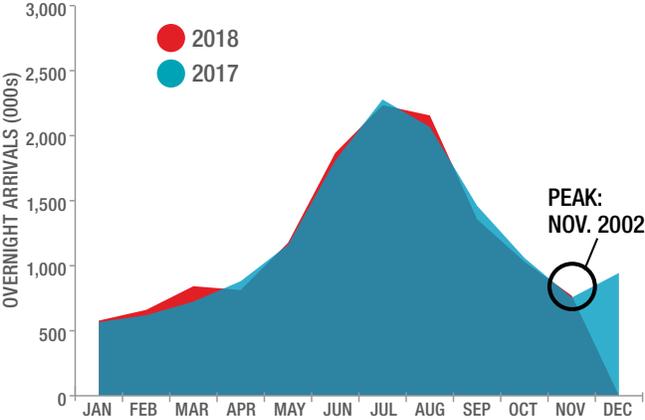
### Overnight Arrivals

	November 2018		YTD 2018	
	Arrivals	% YOY Variance	Arrivals	% YOY Variance
Automobile	431,487	5.9	7,618,337	2.2
Air	301,557	-2.0	4,253,380	-3.5
Other	37,179	-3.3	1,624,438	10.6
<b>US Total</b>	<b>770,223</b>	<b>2.2</b>	<b>13,496,155</b>	<b>1.2</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

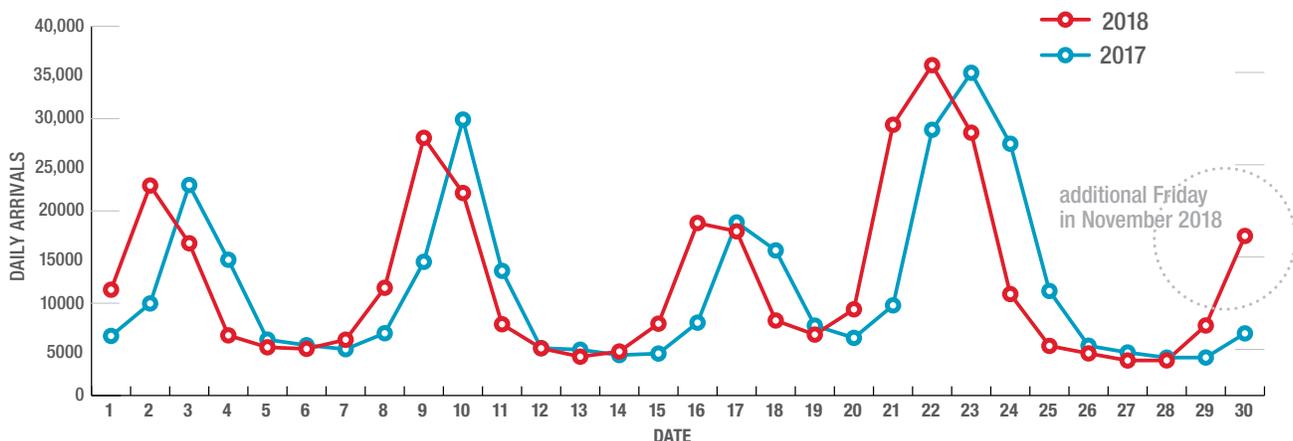
Air Seat Capacity <sup>i</sup>	November 2018	6.4%
	YTD	4.7%
Exchange Rate <sup>ii</sup>	November 2018	3.4%
	YTD	-0.6%
Consumer Confidence Index (1985=100) <sup>iii</sup>	November 2018	136.4
	Previous Month	137.9
YTD Arrival Peak <sup>iv</sup>	Peak Year	2002
	Current % of Previous Peak	88.5%

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

- Following two months of declines, overnight arrivals from the US reached 770,000 in November 2018, up 2.2% year-over-year and the highest level recorded for the month of November since the peak in 2002. This growth was driven by increased auto arrivals (+5.9%), which outpaced declining arrivals by air (-2.0%) and other modes of transportation such as bus, train, and cruise (-3.3%).
- Daily US auto arrivals data (based on IPIL daily arrivals estimates) suggests that the month of November 2018 likely benefited from an additional Friday compared to November 2017, allowing for more weekend arrivals in November this year, in addition to the consistent peaks over two long weekends.
- From January to November 2018, 13.5 million US tourists visited Canada, up 1.2% over the same period in 2017 and the highest level since 2005. Increased auto arrivals (+2.2%) and arrivals by other modes of transportation (+10.6%) outpaced the ongoing decline in US air arrivals (-3.5%).
- The largest proportions of US auto arrivals came from New York (19.3% in November, 17.3% YTD), Washington (18.8% in November, 14.7% YTD) and Michigan (12.3% in November, 10.8% YTD) – all of which also saw notable increases in November 2018.
- While the purchasing power of the USD in Canada is marginally down over the first eleven months of the year
- (-0.6%), it continued to show signs of improvement in November 2018 (+3.4%).
- Air capacity between Canada and the United States continued to expand (+6.4% in November, +4.7% YTD), despite declining US arrivals by air, indicating that Canadians returning from the US occupied an increasing share of available seats. However, as Statistics Canada has noted, these results should be interpreted with caution given the recent incorporation of PIK air arrival data in frontier counts and comparability with 2017 air arrival data.
- Following four consecutive months of growth, the consumer confidence index published by the US Conference Board fell 1.5 points to 136.4 in November 2018, coinciding with the US midterm election.

### Daily US Overnight Auto Arrivals – November 2018



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

# MEXICO

## Mexico Arrivals to Canada

CURRENT MONTH:

**+23.0** ↑ YOY



YTD:

**+11.4%** ↑ YOY

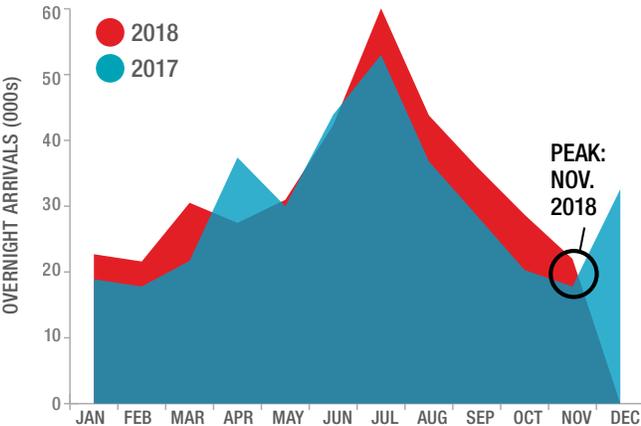
### Overnight Arrivals

	November 2018		YTD 2018	
	Arrivals	% YOY Variance	Arrivals	% YOY Variance
Mexico	21,912	23.0	363,406	11.4

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>	November 2018	-3.9%
	YTD	37.8%
Exchange Rate <sup>ii</sup>	November 2018	-3.4%
	YTD	-2.1%
YTD Arrival Peak <sup>iii</sup>	Peak Year	2017
	Current % of Previous Peak	111.4%

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.

- In November 2018, Canada welcomed a record 22,000 visitors from Mexico, up 23.0% (an additional 4,000 visitors) over November 2017. This marks five consecutive months of record arrivals from Mexico, and four consecutive months of leading Destination Canada's international markets in arrivals growth.
- Building on the exceptional performance achieved since the replacement of the visa requirement for Mexican citizens with the eTA in December 2016, arrivals from Mexico over the January to November period also set a new record, with 363,000 visitors, up 11.4% (an additional 37,000 visitors) over the same period in 2017.
- While direct air arrivals accounted for 71.0% of arrivals from Mexico in November 2018, growth over November 2017 was driven primarily from increased arrivals via the US, both by air (+70.4%) and by land (+214.9%). However, YTD arrivals were still primarily driven by direct air arrivals (+26.7%), which accounted for 75.1% of total arrivals from this market over the first eleven months of the year, while arrivals via the US by land (-37.4%) and by air (-10.0%) declined. Note that increased land entry via the US in November 2018 may have resulted from changes in the data collection processes at select land border points.
- Supporting this trend, direct air capacity between Mexico City and Canada expanded by 37.8% YTD, but actually contracted slightly in November 2018 (-3.9%).

## Mexico Arrivals by Port of Entry

- Of the 75.1% of visitors from Mexico who flew directly to Canada from January to November 2018, most flew into YYZ (42.7%), YVR (31.8%), or YUL (20.5%), with just 4.1% flying into YYC and 0.6% to other Canadian airports. YVR (+59.4%) continued to record the strongest year-over-year growth in arrivals from this market, followed by YYC (+33.3%).

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

			Mexico
Air Arrivals from Overseas	YYZ	Arrivals	116,530
		YOY%	17.6%
		<b>% of Total</b>	<b>32.1%</b>
	YVR	Arrivals	86,880
		YOY%	59.4%
		<b>% of Total</b>	<b>23.9%</b>
	YUL	Arrivals	56,009
		YOY%	8.0%
		<b>% of Total</b>	<b>15.4%</b>
	YYC	Arrivals	11,077
		YOY%	33.3%
		<b>% of Total</b>	<b>3.0%</b>
	All other airports	Arrivals	2,343
		YOY%	1.1%
		<b>% of Total</b>	<b>0.6%</b>
Subtotal	Arrivals	272,839	
	YOY%	26.7%	
	<b>% of Total</b>	<b>75.1%</b>	
Air Arrivals via the US	All airports	Arrivals	51,240
		YOY%	-10.0%
		<b>% of Total</b>	<b>14.1%</b>
Sea Arrivals	All sea borders	Arrivals	13,585
		YOY%	5.3%
		<b>% of Total</b>	<b>3.7%</b>
Land Arrivals via US	All land borders	Arrivals	25,742
		YOY%	-37.4%
		<b>% of Total</b>	<b>7.1%</b>
<b>Total Overnight Arrivals</b>			<b>363,406</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:

**+2.4% ↑ YOY**

## Overnight Arrivals

	November 2018		YTD 2018	
	Arrivals	% YOY Variance	Arrivals	% YOY Variance
<b>DC Europe</b>	<b>65,610</b>	<b>0.3</b>	<b>1,693,391</b>	<b>2.4</b>
United Kingdom	30,204	6.0	739,669	-1.1
France	23,011	10.3	562,952	5.7
Germany	12,395	-22.6	390,770	4.8
<b>Other Europe</b>	<b>46,397</b>	<b>-60.1</b>	<b>984,498</b>	<b>-15.3</b>
Italy	4,980	-19.1	112,932	-10.7
Netherlands	4,748	-25.0	130,697	0.0
Spain	3,197	-5.2	86,154	-2.9
Switzerland	4,481	-1.5	115,668	-3.6
Rest of Europe	28,991	-9.3	539,047	1.9
<b>Total Europe</b>	<b>112,007</b>	<b>-4.9</b>	<b>2,677,889</b>	<b>1.1</b>

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

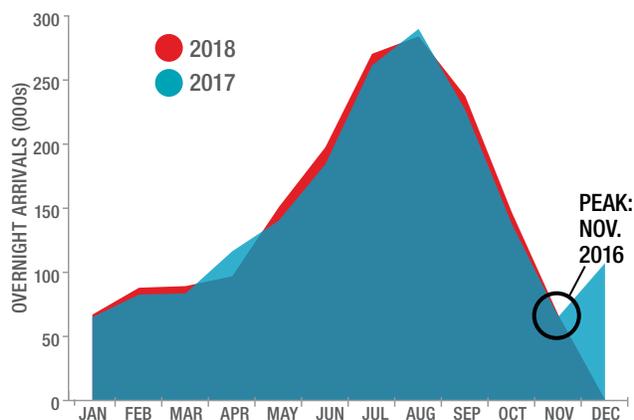


## DC Europe: Key Indicators

		France	Germany	United Kingdom
<b>Air Seat Capacity<sup>i</sup></b>	Nov. 2018	5.0%	6.8%	-7.0%
	YTD	9.9%	2.8%	1.1%
<b>Exchange Rate<sup>ii</sup></b>	Nov. 2018	0.1%	0.1%	0.8%
	YTD	4.8%	4.8%	3.8%
<b>YTD Arrival Peak<sup>iii</sup></b>	Peak Year	2017	1996	2007
	Current % of Previous Peak	105.7%	89.2%	87.3%

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



- In November 2018, 66,000 travellers from Destination Canada's Europe region visited Canada, up a marginal 0.3% over the same month a year ago, but still below the 2016 peak for the month of November. The growth from this region was subdued by a sharp decline in arrivals from Germany, which was just slightly outpaced by strong performances from France and the UK.
- From January to November 2018, arrivals from this region reached a new YTD peak of 1.7 million visitors, up 2.4% over the previous record established in 2017. This YTD performance was driven by arrivals from France and Germany, which outpaced a slight decline from the UK over the first eleven months of 2018.
- Following a slight year-over-year decline in October 2018, arrivals from Germany dropped sharply in November 2018 (-22.6%), across all modes of entry, compared to the monthly record set in November 2017. Year-to-date arrivals reached 391,000 (+4.8%), the highest recorded since the 1996 peak
- France was the only market in this region to record increased arrivals for both November (+10.3%) and YTD (+5.7%). With 23,000 visitors in November 2018 and 563,000 visitors YTD, France set new arrivals records for both periods in 2018.
- Following an extended downward trend earlier in 2018, arrivals from the UK recorded a second consecutive month of growth in November 2018, with 30,000 visitors (+6.0%). YTD arrivals from the UK were still slightly below 2017, with 740,000 visitors (-1.1%).
- Despite very little change in November, the purchasing power of the Euro (+4.8% YTD) and British pound (+3.8% YTD) relative to the Canadian dollar year-to-date in 2018 helped position Canada as a more attractive travel destination.

## DC Europe Arrivals by Port of Entry

- In November and year-to-date 2018, direct air arrivals and land arrivals via the US from Destination Canada's Europe region increased, but decreased air arrivals via the US contributed to a somewhat subdued performance overall.

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

			France	Germany	UK
Air Arrivals from Overseas	YYZ	Arrivals	53,666	104,619	258,685
		YOY%	-16.7%	6.7%	1.3%
		<b>% of Total</b>	<b>9.5%</b>	<b>26.8%</b>	<b>35.0%</b>
	YVR	Arrivals	22,822	72,459	141,245
		YOY%	25.3%	14.7%	6.4%
		<b>% of Total</b>	<b>4.1%</b>	<b>18.5%</b>	<b>19.1%</b>
	YUL	Arrivals	328,229	44,953	47,767
		YOY%	20.8%	9.5%	-0.1%
		<b>% of Total</b>	<b>58.3%</b>	<b>11.5%</b>	<b>6.5%</b>
	YYC	Arrivals	2,914	23,251	63,623
		YOY%	-12.4%	6.4%	-1.3%
		<b>% of Total</b>	<b>0.5%</b>	<b>6.0%</b>	<b>8.6%</b>
All other airports	Arrivals	15,320	21,101	40,352	
	YOY%	4.3%	9.4%	7.9%	
	<b>% of Total</b>	<b>2.7%</b>	<b>5.4%</b>	<b>5.5%</b>	
Subtotal	Arrivals	422,951	266,383	551,672	
	YOY%	16.6%	8.8%	2.3%	
	<b>% of Total</b>	<b>75.1%</b>	<b>68.2%</b>	<b>74.6%</b>	
Air Arrivals via the US	All airports	Arrivals	90,509	43,687	86,267
		YOY%	-34.2%	-21.9%	-19.5%
		<b>% of Total</b>	<b>16.1%</b>	<b>11.2%</b>	<b>11.7%</b>
Sea Arrivals	All sea borders	Arrivals	1,857	32,290	44,372
		YOY%	-20.4%	3.1%	-1.9%
		<b>% of Total</b>	<b>0.3%</b>	<b>8.3%</b>	<b>6.0%</b>
Land Arrivals via US	All land borders	Arrivals	47,635	48,410	57,358
		YOY%	59.4%	18.4%	2.1%
		<b>% of Total</b>	<b>8.5%</b>	<b>12.4%</b>	<b>7.8%</b>
<b>Total Overnight Arrivals</b>			<b>562,952</b>	<b>390,770</b>	<b>739,669</b>

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:

**-14.4% ↓ YOY**



YTD:

**-1.5% ↓ YOY**

## Overnight Arrivals

	November 2018		YTD 2018	
	Arrivals	% YOY Variance	Arrivals	% YOY Variance
<b>DC Asia-Pacific</b>	<b>79,479</b>	<b>-14.4</b>	<b>1,742,123</b>	<b>-1.5</b>
Australia	12,604	-13.6	311,314	-7.9
China	31,270	7.4	694,745	8.7
India	14,158	-8.7	269,561	14.5
Japan	12,592	-25.5	234,886	-18.3
South Korea	8,855	-47.1	231,617	-13.8
<b>Other Asia-Pacific</b>	<b>43,771</b>	<b>39.1</b>	<b>791,791</b>	<b>38.9</b>
Hong Kong	7,516	26.2	141,914	4.0
Taiwan	8,025	13.1	122,454	27.1
Rest of Asia-Pacific	28,230	-0.2	527,423	7.8
<b>Total Asia-Pacific</b>	<b>123,250</b>	<b>-8.2</b>	<b>2,533,914</b>	<b>1.7</b>



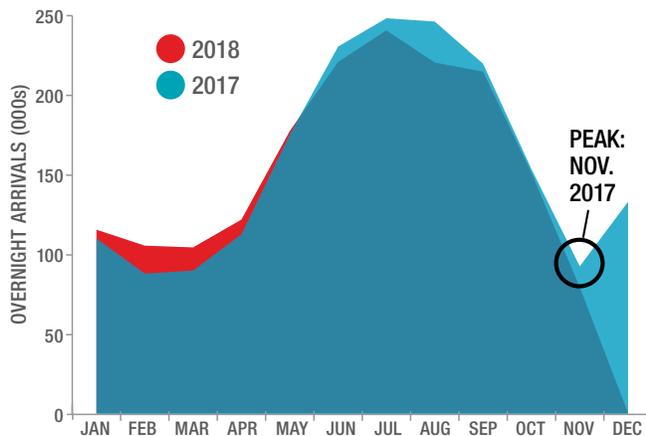
Source: Statistics Canada, Frontier counts, custom tabulations.  
Note: The figures are preliminary estimates and are subject to change.

## Asia-Pacific: Key Indicators

		Australia	China	India	Japan	South Korea
Air Seat Capacity <sup>i</sup>	Nov. 2018	22.2%	5.0%	7.9%	1.2%	3.6%
	YTD	14.0%	6.7%	22.6%	-4.5%	-0.6%
Exchange Rate <sup>ii</sup>	Nov. 2018	-1.7%	-1.4%	-6.5%	2.9%	1.0%
	YTD	-2.7%	2.3%	-4.9%	1.0%	2.6%
YTD Arrival Peak <sup>iii</sup>	Peak Year	2017	2017	2017	1996	2017
	Current % of Previous Peak	92.1%	108.7%	114.5%	38.0%	86.2%

Sources:  
i. IATA-Diiio 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 Asia-Pacific Arrivals



- For a sixth consecutive month, arrivals from Destination Canada's Asia-Pacific region were down in November 2018 compared to November 2017 (79,000 visitors, -14.4%), with decreased arrivals from four of the five markets. Year-to-date arrivals were also down year-over-year (1.7 millions, -1.5%), with only China and India recording more visitors compared to the same period in 2017.
- With 31,000 visitors (+7.4%) in November 2018, and 695,000 visitors year-to-date (+8.7%), China posted record arrivals for both periods. China was Destination Canada's largest source of long-haul arrivals in November 2018, but still ranked second to the UK in year-to-date arrivals.
- Amid low consumer confidence and weaker purchasing power in Canada compared to a year ago, arrivals from India dropped in November 2018 (-8.7%). Year-to-date, arrivals were still well ahead of 2017 (+14.5%) and set a new record peak for January-November arrivals.
- Both in November and year-to-date 2018, Canada welcomed fewer visitors from South Korea (-47.1% in November, -13.8% YTD), Japan (-25.5% in November, -18.3% YTD), and Australia (-13.6% in November, -7.9% YTD). In November, arrivals from South Korea and Japan contracted across all modes of entry, and air arrivals (direct and via the US) from Australia also declined. For South Korea, lower land entry via the US (-75.8%) may have resulted from changes in data collection processes at select land border points.

## DC Asia-Pacific Arrivals by Port of Entry

- In November 2018, arrivals from Destination Canada's Asia-Pacific region were down across all modes of entry, with the biggest decrease coming from land arrivals via the US. However, from January to November 2018, land arrivals were the only mode of entry to record an increase in arrivals from this region. As these figures may have been the result of changes in data collection processes, Statistics Canada advises caution in interpreting land port arrival levels.

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

		Australia	China	India	Japan	South Korea	
Air Arrivals from Overseas	YYZ	Arrivals	13,993	204,985	123,025	45,402	49,885
		YOY%	-10.9%	3.8%	4.4%	-35.8%	-14.3%
		% of Total	4.5%	29.5%	45.6%	19.3%	21.5%
	YVR	Arrivals	108,173	266,197	57,763	98,220	70,220
		YOY%	0.9%	11.6%	116.9%	-15.3%	0.0%
		% of Total	34.7%	38.3%	21.4%	41.8%	30.3%
	YUL	Arrivals	2,558	38,282	7,417	10,342	962
		YOY%	0.1%	9.8%	-21.6%	518.5%	5.5%
		% of Total	0.8%	5.5%	2.8%	4.4%	0.4%
	YYC	Arrivals	1,393	10,495	9,959	12,027	965
		YOY%	4.1%	-14.5%	23.0%	-23.5%	-44.0%
		% of Total	0.4%	1.5%	3.7%	5.1%	0.4%
	All other airports	Arrivals	831	459	2,305	230	124
		YOY%	0.7%	0.1%	1.4%	0.1%	0.1%
		% of Total	0.3%	0.1%	0.9%	0.1%	0.1%
	Subtotal	Arrivals	126,948	520,418	200,469	166,221	122,156
		YOY%	-0.6%	7.5%	21.1%	-18.7%	-6.9%
		% of Total	40.8%	74.9%	74.4%	70.8%	52.7%
Air Arrivals via the US	All airports	Arrivals	108,990	75,384	35,621	43,367	27,111
		YOY%	-14.2%	-13.8%	9.7%	-26.9%	-26.1%
		% of Total	35.0%	10.9%	13.2%	18.5%	11.7%
Sea Arrivals	All sea borders	Arrivals	43,959	12,185	10,850	5,028	5,340
		YOY%	-7.9%	-20.1%	12.9%	14.3%	-3.2%
		% of Total	14.1%	1.8%	4.0%	2.1%	2.3%
Land Arrivals via US	All land borders	Arrivals	31,417	86,758	22,621	20,270	77,010
		YOY%	-12.0%	65.4%	-18.8%	3.4%	-19.0%
		% of Total	10.1%	12.5%	8.4%	8.6%	33.2%
<b>Total Overnight Arrivals</b>		<b>311,314</b>	<b>694,745</b>	<b>269,561</b>	<b>234,886</b>	<b>231,617</b>	

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

# CANADIAN OUTBOUND TRAVEL

## Overnight Trips by Canadians

	November 2018	YOY % Variance	Jan.- Nov. 2018	YOY % Variance
<b>United States</b>	1,562,297	6.2	19,975,447	6.0
<b>Other Countries</b>	788,356	-10.1	11,010,529	-7.0
<b>Total Trips from Canada</b>	2,350,653	0.1	30,985,976	1.0

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

- In November 2018, overall Canadian outbound travel was on par with November 2017 (+0.1%), with increased visitation to the US (+6.2%) counteracting a decline in international travel to other destinations (-10.1%). The growth in Canadians returning from the US was driven by air travel (+18.3%), while travel by automobile (-4.3%) and other modes of transport (-14.0%) declined.
- From January through November 2018, Canadian international travel was slightly ahead of the same period last year (+1.0%), again due to an increase in travel to the US (+6.0%) outpacing a decline in overseas travel (-7.0%). The growth in the number of Canadians returning from the US was driven by air (+12.1%) and auto (+2.3%) travel, while other modes (-4.4%) declined.
- However, these results should be interpreted with caution given the recent incorporation of PIK air arrival data in frontier counts and comparability with 2017 air arrival data, which has not yet been revised. In particular, Statistics Canada noted, “there has been an increased tendency of Canadian travellers returning from overseas trips via the United States to report that they are returning from the United States and not overseas via the United States”.

# INTERNATIONAL ARRIVALS BY PROVINCE OF ENTRY

## Year-to-date Overnight Arrivals by Province of Entry

		Newfoundland and Labrador	Prince Edward Island	Nova Scotia	New Brunswick	Québec	Ontario
Total One or more nights	2018	57,492	321	258,600	340,676	2,970,360	8,958,438
	Variance YOY%	-13.9%	-92.6%	5.6%	-0.9%	2.4%	-1.8%
	Change YOY	(9,311)	(4,000)	13,796	(3,038)	70,436	(161,282)
US Residents by Automobile	2018	0	0	17,139	242,582	1,021,034	4,107,135
	Variance YOY%	0.0%	0.0%	18.5%	0.3%	1.6%	1.8%
	Change YOY	-	-	2,676	657	16,166	71,246
US Residents by Non-Automobile	2018	12,919	294	152,301	78,183	809,862	2,293,012
	Variance YOY%	-7.0%	-92.2%	2.2%	-11.3%	1.1%	-7.6%
	Change YOY	(970)	(3,467)	3,276	(10,008)	8,975	(188,864)
Residents from Other Countries	2018	44,573	27	89,160	19,911	1,139,464	2,558,291
	Variance YOY%	-15.8%	-95.2%	9.6%	46.4%	4.1%	-1.7%
	Change YOY	(8,341)	(533)	7,844	6,313	45,295	(43,664)

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

## Year-to-date Overnight Arrivals by Province of Entry

		Manitoba	Saskatchewan	Alberta	British Columbia	Yukon	Nunavut	CANADA
Total One or more nights	2018	221,383	80,190	1,004,427	5,656,330	174,708	2,270	19,725,195
	Variance YOY%	7.0%	7.9%	0.8%	7.0%	10.7%	57.1%	1.7%
	Change YOY	14,550	5,864	8,194	371,526	16,857	825	324,417
US Residents by Automobile	2018	142,764	56,896	155,906	1,784,480	90,401	0	7,618,337
	Variance YOY%	5.7%	3.6%	2.6%	3.2%	2.8%	0.0%	2.2%
	Change YOY	7,736	1,992	3,909	55,069	2,487	-	161,938
US Residents by Non-Automobile	2018	64,995	20,924	549,035	1,831,820	64,384	89	5,877,818
	Variance YOY%	2.7%	21.8%	1.5%	9.7%	29.8%	8.5%	0.0%
	Change YOY	1,711	3,740	8,134	162,398	14,777	7	(291)
Residents from Other Countries	2018	13,624	2,370	299,486	2,040,030	19,923	2,181	6,229,040
	Variance YOY%	59.9%	5.9%	-1.3%	8.2%	-2.0%	60.0%	2.7%
	Change YOY	5,103	132	(3,849)	154,059	(407)	818	162,770

- From January to November 2018, most international visitors to Canada continued to enter the country via Ontario (45.4%), British Columbia (28.7%), and Quebec (15.1%).
- The increase in US auto arrivals to Canada over this period (+2.2%) was reflected in increased border crossings in all provinces with land borders, with the largest gains registered in Ontario (71,000 additional visitors, +1.8%), British Columbia (55,000 additional visitors, +3.2%), Quebec (16,000 additional visitors, +1.6%) and Manitoba (8,000, +5.7%).
- Overall, the biggest year-over-year increase in international arrivals over the first eleven months of 2018 came through British Columbia (372,000 additional visitors, +7.0%), with 41.5% of that growth coming from overseas tourists (154,000 additional visitors, +8.2%) and 43.7% from US non-auto arrivals (162,000 additional visitors, +9.7%).
- The biggest decrease in international arrivals over this period was seen in Ontario (161,000 fewer visitors, -1.8%), where the largest share of declining visitors originated from fewer US residents entering Canada by modes other than automobiles.

# ACCOMMODATION

## Hotel Performance Indicators by Province

	Occupancy Rates				Average Daily Rate (ADR)				Revenue Per Available Room (RevPAR)			
	Nov. 2018	YOY <sup>^</sup> Variance	Jan.- Nov	YOY <sup>^</sup> Variance	Nov. 2018	YOY % Variance	Jan.- Nov	YOY % Variance	Nov. 2018	YOY % Variance	Jan.- Nov	YOY % Variance
<b>Alberta<sup>1</sup></b>	55.9%	2.0	57.2%	2.4	\$131.19	0.7%	\$131.55	0.7%	\$73.40	4.5%	\$75.24	5.1%
<b>British Columbia</b>	62.4%	3.1	72.2%	0.7	\$150.22	6.6%	\$188.85	9.2%	\$93.73	12.2%	\$136.36	10.3%
<b>Saskatchewan</b>	61.5%	3.8	58.2%	2.8	\$121.48	1.1%	\$118.15	-1.4%	\$74.74	7.7%	\$68.75	3.7%
<b>Manitoba</b>	73.1%	5.6	70.4%	0.4	\$125.53	1.4%	\$125.53	1.4%	\$91.74	9.8%	\$88.35	2.1%
<b>Ontario</b>	68.7%	-0.6	71.6%	0.9	\$157.76	4.3%	\$163.03	4.7%	\$108.45	3.5%	\$116.78	6.0%
<b>Quebec</b>	63.1%	-2.8	70.4%	-1.4	\$155.83	1.3%	\$173.31	2.9%	\$98.39	-3.1%	\$121.99	0.9%
<b>New Brunswick</b>	58.0%	2.1	62.9%	0.3	\$120.96	3.9%	\$126.02	3.3%	\$70.15	7.7%	\$79.28	3.7%
<b>Nova Scotia</b>	60.9%	-2.1	68.6%	-0.9	\$133.72	1.8%	\$150.15	5.5%	\$81.40	-1.7%	\$102.94	4.2%
<b>Newfoundland</b>	51.4%	-5.1	55.0%	-10.0	\$125.06	-8.5%	\$141.48	-3.0%	\$64.34	-16.7%	\$77.88	-17.9%
<b>Prince Edward Island</b>	38.4%	-9.8	59.6%	-0.3	\$113.30	-3.1%	\$154.16	5.3%	\$43.50	-22.9%	\$91.84	4.8%
<b>Northwest Territories</b>	63.2%	-12.8	71.1%	-0.8	\$146.06	11.9%	\$149.29	5.2%	\$92.24	-7.0%	\$106.07	4.0%
<b>Yukon</b>	54.5%	-2.3	66.4%	-0.8	\$129.74	5.4%	\$144.43	8.1%	\$70.70	1.1%	\$95.88	6.9%
<b>Canada</b>	<b>63.1%</b>	<b>0.7</b>	<b>67.7%</b>	<b>0.7</b>	<b>\$147.60</b>	<b>3.2%</b>	<b>\$162.82</b>	<b>4.5%</b>	<b>\$93.13</b>	<b>4.4%</b>	<b>\$110.21</b>	<b>5.6%</b>

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

<sup>^</sup> Percentage points.

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

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- In November 2018, the National Occupancy Rate was marginally ahead of the same period in 2017 (63.1%, +0.7 percentage points), as was the January to November 2018 rate (67.7%, +0.7 p.p.). The highest occupancy rates in November 2018 were reported in Manitoba (68.7%), Ontario (68.7%), and the Northwest Territories (63.2%), while the highest rates year-to-date were in British Columbia (72.2%), Ontario (71.6%) and the Northwest Territories (71.1%).
- Both in November and YTD 2018, only about half of the provinces and territories recorded an increase in occupancy rates compared to 2017.
- In November 2018, the National Average Daily Rate (ADR) reached \$147.60 (+3.2%), bringing the YTD 2018 ADR to \$162.82 (+4.5%). By province, the highest rates were recorded in Ontario (\$157.76 in November, \$163.03 YTD), Quebec (\$155.83 in November, \$173.31 YTD), and British Columbia (\$150.22 in November, \$188.85 YTD).
- The National Average Revenue per Available Room (RevPar) also continued to grow, sitting at \$93.13 (+4.4%) in November 2018 and \$110.21 YTD 2018 (+5.6%). The same three provinces – Ontario, Quebec, and British Columbia – led with the highest RevPar in the country, both in November and YTD 2018.

# ACCOMMODATION

## Hotel Performance Indicators by Property Type

	Occupancy Rates				Average Daily Rate (ADR)			
	Nov. 2018	YOY^ Change	Jan.- Nov.	YOY^ Variance	Nov. 2018	YOY Variance	Jan.- Nov.	YOY Variance
<b>Property Size</b>								
Under 50 rooms	48.5%	2.5	54.8%	0.8	\$109.60	5.7%	\$119.62	5.3%
50-75 rooms	55.0%	0.0	61.8%	0.7	\$110.50	3.2%	\$122.50	3.5%
76-125 rooms	60.9%	0.6	65.9%	0.9	\$126.44	3.4%	\$135.56	3.2%
126-200 rooms	64.3%	1.6	68.0%	0.3	\$138.90	3.0%	\$149.64	4.5%
201-500 rooms	67.5%	0.1	71.0%	0.8	\$174.08	3.0%	\$192.82	4.9%
Over 500 rooms	71.0%	0.2	76.2%	0.4	\$205.11	4.4%	\$247.58	6.5%
<b>Total</b>	<b>63.1%</b>	<b>0.7</b>	<b>67.7%</b>	<b>0.7</b>	<b>\$147.60</b>	<b>3.2%</b>	<b>\$162.82</b>	<b>4.5%</b>
<b>Property Type</b>								
Limited Service	58.8%	0.9	63.1%	1.1	\$117.16	3.9%	\$123.15	3.9%
Full Service	67.0%	0.5	70.4%	0.8	\$162.74	3.0%	\$177.41	4.9%
Suite Hotel	71.5%	-0.6	75.2%	-0.3	\$153.84	4.2%	\$168.90	5.5%
Resort	45.4%	1.9	64.2%	-0.2	\$185.26	6.8%	\$257.52	8.1%
<b>Total</b>	<b>63.1%</b>	<b>0.7</b>	<b>67.7%</b>	<b>0.7</b>	<b>\$147.60</b>	<b>3.2%</b>	<b>\$162.82</b>	<b>4.5%</b>
<b>Price Level</b>								
Budget	56.3%	1.8	62.0%	1.0	\$100.86	4.4%	\$109.37	5.5%
Mid-Price	64.0%	0.2	68.2%	0.6	\$140.82	2.6%	\$152.01	3.4%
Upscale	67.7%	1.0	72.7%	0.2	\$225.32	3.6%	\$268.04	5.9%
<b>Total</b>	<b>63.1%</b>	<b>0.7</b>	<b>67.7%</b>	<b>0.7</b>	<b>\$147.60</b>	<b>3.2%</b>	<b>\$162.82</b>	<b>4.5%</b>

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

- Larger properties (500+ rooms) continued to report the highest occupancy rates across Canada, with small properties (<50 rooms) reporting some of the fastest growth despite lower occupancy rates. Suite hotels continued to report the highest occupancy rates by property type, despite a slight decline, while upscale properties continued to report the highest occupancy rates by price level.
- Occupancy rates increased year-over-year across property sizes and price levels. Marginal declines were only seen for suite hotels in November 2018, and for both resorts and suite hotels year-to-date.
- Larger properties (500+ rooms) and upscale properties reported the highest average daily rates (ADR) by property size and price level over this period, while resorts continued to report the highest ADR by property type.