

Tourism Snapshot

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

June 2019
Volume 15, Issue 6

KEY HIGHLIGHTS

IMPORTANT NOTE REGARDING THE FRONTIER COUNTS DATA:

Land port data: There have been significant changes in how country of residence data is collected and established for non-US visitors entering Canada by land ports, starting in August 2018. As a result of these changes, monthly arrival levels by land are not comparable to data collected before August 2018. Year-over-year arrival performance results should only be evaluated for non-land arrival modes of transportation for non-US arrivals. This does not apply to US Auto arrivals.

Air arrivals data: Destination Canada advises caution in interpreting air arrival data with previous years as air arrivals include same-day and international passengers connecting through Canada between other international origins and destinations. Connecting traffic may have been subjected to material fluctuations in recent months.

Starting with January 2019 data, Statistics Canada updated the method of determining trip durations for US residents travelling to Canada and Canadian residents returning from the United States for non-automobile modes of transportation. This change affects the relative proportions of same-day/overnight travellers. Caution is therefore advised when comparing 2019 data with earlier time periods for these modes of transportation.

- In June 2019, Canada welcomed a record 2.76 million international overnight arrivals, slightly ahead of the previous June peak set last year (+1.9%). Year-to-date international overnight arrivals to Canada expanded by 4.1% to reach a new record peak for the first half of the year.
- Overnight arrivals from Destination Canada's long-haul markets were up 6.6% year-over-year and reached a new peak in June 2019. Direct air arrivals gained a healthy +3.8%, offsetting a continued decline in air arrivals via the US (-3.8%), which only accounted for 12.5% of total arrivals from these nine markets. Year-to-date arrivals from Destination Canada's long-haul markets were up +6.0% compared to the same period last year. These strong numbers were supported by France, Mexico and Germany, who all recorded double-digit growth in direct air arrivals in June 2019 (17.1%, 16.3% and 12.0%, respectively).
- Overnight international arrivals from the US in June 2019 were marginally below 2018 levels (-0.3%), due to a combination of a small downward shift in auto arrivals (-0.3%) and a decline in arrivals by other modes (-25.7%). However, US air arrivals continued to record strong growth (+14.7%) in June 2019. Year-to-date, both total overnight arrivals (+2.8%) and air arrivals (+13.3%) from the US were ahead of 2018 levels, and US air arrivals reached new records both for the month of June and the first half of the year.
- Continuing recent trends, Mexico lead all Destination Canada markets in growth, up 32.7% in June 2019, including +16.3% direct air arrivals and +35.1% via US air arrivals. This brought year-to-date growth up 30.4%, including +15.4% direct air arrivals and +36.5% via US air arrivals.
- In June 2019, France posted the strongest direct air arrivals growth of all Destination Canada's markets (+17.1%), bringing total overnight arrivals up to a new peak for the month of June.
- Direct air arrivals from Germany rebounded in June 2019 (+12.0%), pulling total German year-to-date overnight arrivals up from -5.0% in May to -2.0% in June.
- The ongoing decline from China appears to be accelerating, with direct air arrivals falling -6.0% year-over-year in June 2019, compared with -5.4% year-over-year in May and April. However, year-to-date overnight arrivals from China overall see a minimal decline (-0.9%) following 15 years of continuous growth. Air arrivals via the US were down 18.9% in June 2019.
- With continued double-digit growth in overnight arrivals in the peak travel month for visitors from India (+13.7% in June 2019, +18.7% year-to-date), India surpassed Australia and Germany in terms of total year-to-date overnight arrivals, currently ranked fifth among Destination Canada's long-haul markets (behind UK, China, France and Mexico).

¹Note the caveat from Statistics Canada associated with the June 2019 data, available here: <https://www150.statcan.gc.ca/n1/daily-quotidien/190723/dq190723a-eng.htm>

QUICK LINKS

Industry Performance Dashboard

	June 2019	Year-to-date
✈️ Overnight Arrivals¹		
Total International Overnight Arrivals	↑ 1.9%	↑ 4.1%
10 Destination Canada Markets*	↑ 1.1%	↑ 3.5%
<i>United States</i>	↓ -0.3%	↑ 2.8%
<i>9 Long-Haul Markets</i>	↑ 6.6%	↑ 6.0%
Non-Destination Canada Markets	↑ 7.9%	↑ 8.1%
✈️ Air Seat Capacity²		
Total International	↑ 1.1%	↑ 4.4%
10 Destination Canada Markets*	↓ -0.6	↑ 3.0%
Non-Destination Canada Markets	↑ 5.8%	↑ 7.3%
🏠 National Hotel Indicators³		
Occupancy Rate**	↓ -0.8	↓ -0.5
Revenue Per Available Room (Revpar)	↑ 1.4%	↑ 1.8%
Average Daily Rate (ADR)	↑ 0.4%	↑ 0.9%

Notes:

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

* The 10 DC markets are US, France, Germany, UK, Australia, China, India, Japan, South Korea and Mexico.

** Percentage point variations.

Sources:

1. Statistics Canada, Frontier counts, custom tabulations

2. IATA-Diio SRS Analyser

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

MARKET MONITOR SUMMARY

	Market	Overnight Arrivals ⁱ		Arrival YOY Variations (%)		Air Seat capacity ⁱⁱ		Local currency vs. CAD ⁱⁱⁱ	
		June 2019	YTD 2019	June 2019	YTD 2019	June 2019	YTD 2019	June 2019 Average	YTD Average
North America	United States	1,907,725	6,089,232	-0.3%	2.8%	-0.5%	4.0%	1.2%	4.3%
	Mexico	56,664	221,798	32.7%	30.4%	1.7%	-0.5%	6.6%	3.7%
Europe	France	62,666	242,061	18.9%	10.8%	8.5%	6.9%	-2.1%	-2.6%
	Germany	50,825	147,887	4.2%	-2.0%	6.7%	4.6%	-2.1%	-2.6%
	United Kingdom	106,923	340,948	11.9%	8.2%	-4.7%	-5.6%	-3.4%	-1.9%
Asia-Pacific	Australia	44,105	155,769	-2.7%	2.7%	5.5%	14.7%	-6.2%	-4.5%
	China	73,620	303,091	-1.6%	-0.9%	-4.9%	1.6%	-5.1%	-2.1%
	India	52,354	169,705	13.7%	18.7%	-51.9%	-14.5%	-1.1%	-2.1%
	Japan	20,492	98,042	-13.2%	-3.0%	-6.0%	5.6%	3.1%	3.0%
	South Korea	24,024	87,842	-24.1%	-20.3%	8.3%	-1.2%	-5.5%	-2.0%
Total 10 Destination Canada Markets		2,399,398	7,856,375	1.1%	3.5%				
Rest of the World		358,108	1,180,320	7.9%	8.1%				
Total International		2,757,506	9,036,695	1.9%	4.1%				

Sources:

- i. Statistics Canada, Frontier counts, custom tabulations
- ii. IATA-Diiio SRS Analyser
- iii. Bank of Canada

Notes:

- i. Overnight arrivals are preliminary estimates and are subject to changes. Overnight arrivals are defined as tourist estimates equal to total travellers entering Canada (by land, air and sea) less same-day land arrivals. The topline statistics published by Statistics Canada are based on total travellers (including same-day), while the topline statistics published by Destination Canada are based on overnight arrivals to Canada.
- 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

United States Overnight Arrivals to Canada

CURRENT MONTH:
-0.3% ↓ YOY



YTD:
+2.8% ↑ YOY

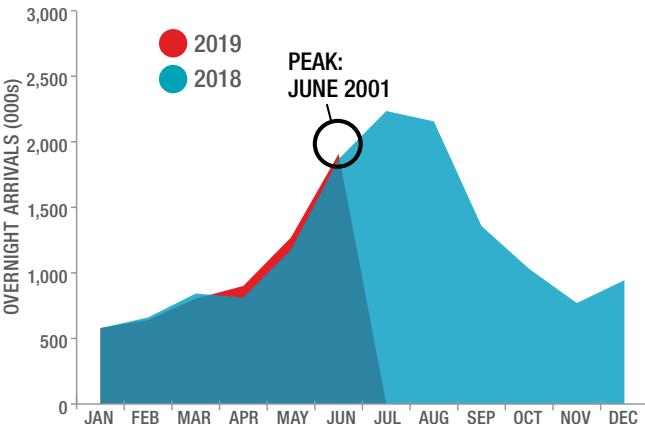
Overnight Arrivals

	June 2019		YTD 2019	
	Arrivals	% YOY Variance	Arrivals	% YOY Variance
Automobile	1,048,245	-0.3	3,331,792	2.6
Air	622,146	14.7	2,252,571	13.3
Other	237,334	-25.7	504,869	-26.2
US Total	1,907,725	-0.3	6,089,232	2.8

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



Trend Plot: Total United States Overnight Arrivals to Canada



United States: Key Indicators

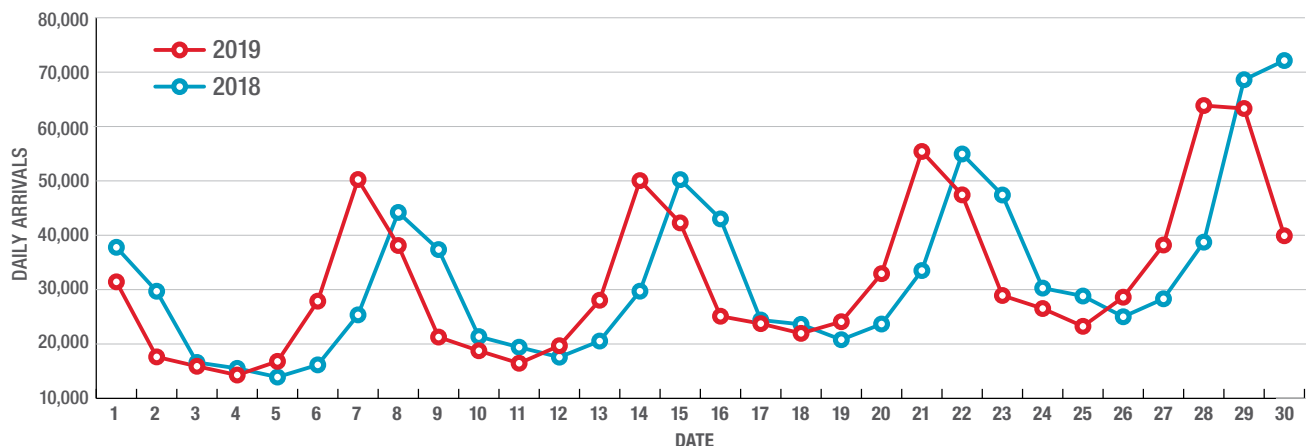
Air Seat Capacityⁱ	June 2019	-0.5%
	YTD	4.0%
Exchange Rateⁱⁱ	June 2019	1.2%
	YTD	4.3%
Consumer Confidence Index (1985=100)ⁱⁱⁱ	June 2019	124.3
	Previous Month	131.3
YTD Arrival Peak^{iv}	Peak Year	2001
	Current % of Previous Peak	94.1%

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 1.91 million overnight visitors from the US in June 2019, down a marginal 0.3% compared to June 2018. Year-to-date overnight arrivals over the first half of 2019 were still ahead of 2018 levels, with 6.09 million visitors (+2.8%).
- Despite the slowed performance in total US overnight arrivals, US air arrivals continued to trend upward, hitting new records for both the month of June (+14.7%) and the first half of the year (+13.3%). June 2019 also marked six consecutive months of year-over-year growth in US air arrivals to Canada.
- The marginal downward shift in US overnight auto arrivals in June 2019 may be at least partially attributable to the timing of the Independence Day holiday. As the Fourth of July fell on a Thursday this year, some of the “long weekend” traffic which may have arrived over the last weekend of June in 2018 may have shifted to the first week of July in 2019.
- The decline in June 2019 was mainly attributable to the ongoing decline in US arrivals via other modes of transport such as bus, train, and cruise (-25.7%).
 - It is important to note that Statistics Canada advises caution when comparing 2019 data with earlier time periods for US arrivals via non-automobile modes of transportation due to methodology changes beginning in January 2019.
- Over the first half of 2019, the largest proportions of US overnight auto arrivals (based on IPIL arrival estimates) came from New York, Washington, and Michigan, together accounting for 43.3% of US overnight auto arrivals from January to June 2019.
- After five consecutive months of expansion, air capacity between Canada and the US saw a marginal contraction in June 2019 (-0.5%), but remained well ahead of 2018 levels year-to-date (+4.0%). With fewer Canadians flying to the US over this period, the trend suggests that more Americans filled those extra seats in the first half of 2019.
- The purchasing power of the USD in Canada remained strong compared to the same period a year ago, both in June (+1.2%) and YTD (+4.3%).
- Following two months of increases, the consumer confidence index published by the US Conference Board fell 7.0 points to 124.3 in June 2019.

Daily US Overnight Auto Arrivals – June 2019



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

MEXICO

Mexico Overnight Arrivals to Canada

CURRENT MONTH: **+32.7% ↑ YOY**



YTD: **+30.4% ↑ YOY**

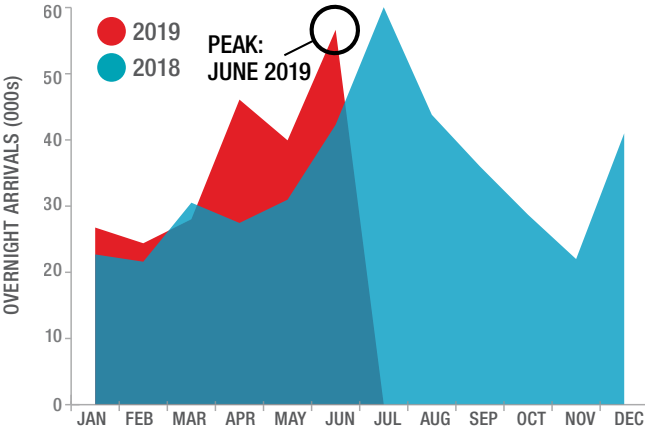
Overnight Arrivals

	June 2019		YTD 2019	
	Arrivals	% YOY Variance	Arrivals	% YOY Variance
Mexico	56,664	32.7	221,798	30.4

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



Trend Plot: Total Mexico Overnight Arrivals to Canada



Mexico: Key Indicators

		Mexico
Air Seat Capacity ⁱ	June 2019	1.7%
	YTD	-0.5%
Exchange Rate ⁱⁱ	June 2019	6.6%
	YTD	3.7%
YTD Arrival Peak ⁱⁱⁱ	Peak Year	2017
	Current % of Previous Peak	129.3%

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.

- Mexico continued to lead Destination Canada's markets in year-over-year growth, bringing overnight arrivals to record levels in June 2019 (57,000, +32.7%). Non-land arrivals (primarily via air) accounted for more than 48,000 of those June 2019 visitors and were up +17.8% year-over-year.
- Over the first six months of 2019, overnight arrivals from Mexico also reached a new record peak for the half of the year (222,000, +30.4%), continuing the long-term positive trend observed since the replacement of the visa requirement for Mexican citizens with the eTA in December 2016. About 192,000 of those were non-land arrivals, up 18.3% year-over-year.
- Mexico was Destination Canada's fourth largest long-haul market both in June 2019, over the first half of 2019, after the UK, China and France.
- This positive performance from Mexico was supported by the strengthening of the Mexican Peso in Canada compared to the same period last year (+6.6% in June, +3.7% year-to-date).
- Following three consecutive months of retraction after a long period of expansion, air capacity between Mexico City and Canada increased slightly in June 2019 (+1.7%), bringing year-to-date capacity almost to 2018 levels (-0.5%).

Mexico Arrivals by Port of Entry

- Over the first half of 2019, the majority of visitors from Mexico flew to Canada direct from overseas (69.2%), while another 15.4% flew to Canada via the US.
- Air arrivals via the US (+36.5%) continued to grow at a faster pace than air arrivals direct from overseas (+15.4%), following steep declines in air arrivals via the US in 2018.

Year-to-date Overnight Arrivals by Port of Entry

			Mexico
Air Arrivals from Overseas	YYZ	Arrivals	61,834
		YOY%	9.0%
		% of Total	27.9%
	YVR	Arrivals	50,449
		YOY%	15.6%
		% of Total	22.7%
	YUL	Arrivals	33,788
		YOY%	30.6%
		% of Total	15.2%
	YYC	Arrivals	3,732
		YOY%	-30.4%
		% of Total	1.7%
	All other airports	Arrivals	3,673
		YOY%	178.3%
		% of Total	1.7%
	Subtotal	Arrivals	153,476
		YOY%	15.4%
		% of Total	69.2%
Air Arrivals via the US	All airports	Arrivals	34,103
		YOY%	36.5%
		% of Total	15.4%
Sea Arrivals	All sea borders	Arrivals	4,050
		YOY%	-0.7%
		% of Total	1.8%
Land Arrivals via US	All land borders	Arrivals	30,169
		YOY%	272.7%
		% of Total	13.6%
Total Overnight Arrivals			221,798

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

EUROPE

Destination Canada European Overnight Arrivals to Canada

CURRENT MONTH:

+11.9% ↑ YOY



YTD:

+6.8% ↑ YOY

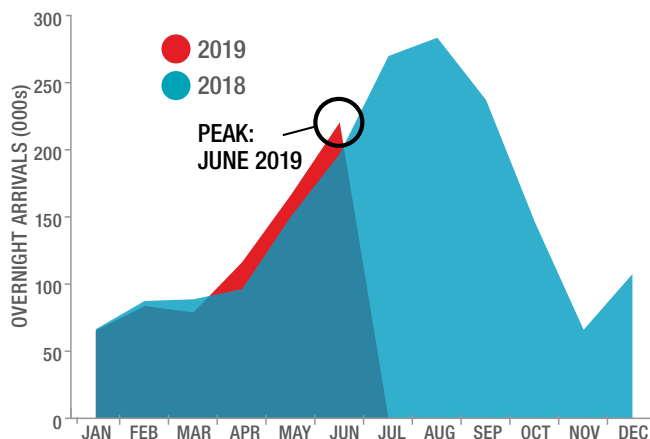
Overnight Arrivals

	June 2019		YTD 2019	
	Arrivals	% YOY Variance	Arrivals	% YOY Variance
Destination Canada Europe	220,414	11.9	730,896	6.8
United Kingdom	106,923	11.9	340,948	8.2
France	62,666	18.9	242,061	10.8
Germany	50,825	4.2	147,887	-2.0
Other Europe	131,444	6.6	433,261	5.2
Italy	13,649	-3.9	43,211	5.4
Netherlands	14,793	-4.2	50,341	-3.1
Spain	10,749	-0.2	31,172	2.4
Switzerland	12,985	-3.2	45,918	4.3
Rest of Europe	79,268	14.1	262,619	7.4
Total Europe	351,858	9.8	1,164,157	6.2



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

Trend Plot: Total Destination Canada Europe Overnight Arrivals to Canada



Europe: Key Indicators

		France	Germany	United Kingdom
Air Seat Capacityⁱ	June 2019	8.5%	6.7%	-4.7%
	YTD	6.9%	4.6%	-5.6%
Exchange Rateⁱⁱ	June 2019	-2.1%	-2.1%	-3.4%
	YTD	-2.6%	-2.6%	-1.9%
YTD Arrival Peakⁱⁱⁱ	Peak Year	2018	1996	2007
	Current % of Previous Peak	110.8%	89.1%	89.2%

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.

- In June 2019, overnight arrivals from Destination Canada's Europe region reached a record 220,000, up 11.9% over June 2018. This brought year-to-date overnight arrivals from January to June 2019 to a new record of nearly 731,000, up 6.8% over the previous record set last year.
- The UK continued to lead Destination Canada's long-haul markets in total overnight arrivals, with 107,000 visitors in June 2019 (+11.9%) and 341,000 visitors year-to-date (+8.2%). For a third consecutive month, June 2019 non-land arrivals from the UK were also up year-over-year (+1.3%), including air arrivals direct from overseas (+1.7%), but still fell below 2018 levels year-to-date (-1.7%).
- With a record 63,000 overnight arrivals in June 2019, France led Destination Canada's Europe region in year-over-year growth (+18.9%), while also posting the strongest direct air arrivals growth of all Destination Canada's markets (+17.1%). Year-to-date overnight arrivals from France also hit a new peak (242,000, +10.8%).
- Total overnight arrivals from Germany recovered in June 2019 (51,000, +4.2%) from a slight dip in May, due to a rebound in direct air arrivals (+12.0%). This pulled total German year-to-date overnight arrivals up from -5.0% in May to -2.0% in June.
- Direct air seat capacity to Canada expanded over this period from France (+8.5% in June, +6.9% year-to-date) and Germany (+6.7% in June, +4.6% year-to-date), but retracted from the UK (-4.7% in June, -5.6% year-to-date).

Destination Canada Europe Arrivals by Port of Entry

- Over the first half of 2019, arrivals by air direct from overseas accounted for nearly three quarters (73.9%) of overnight arrivals from Destination Canada's Europe region. Visitors from France continued to fly to Canada primarily via YUL (80.9% of direct air arrivals and 63.7% of total overnight arrivals from France), while those from the United Kingdom and Germany most often flew via YYZ (45.6% and 38.2% of direct air arrivals, respectively).

Year-to-date Overnight Arrivals by Port of Entry

		France	Germany	UK	
Air Arrivals from Overseas	YYZ	Arrivals	19,204	41,794	109,244
		YOY%	-15.8%	-6.3%	-1.1%
		% of Total	7.9%	28.3%	32.0%
	YVR	Arrivals	9,074	31,892	65,848
		YOY%	17.2%	10.5%	0.6%
		% of Total	3.7%	21.6%	19.3%
	YUL	Arrivals	154,282	20,163	23,602
		YOY%	24.8%	14.7%	2.7%
		% of Total	63.7%	13.6%	6.9%
	YYC	Arrivals	1,597	10,239	31,313
		YOY%	18.8%	-1.3%	-2.8%
		% of Total	0.7%	6.9%	9.2%
	All other airports	Arrivals	6,564	5,338	9,804
		YOY%	20.3%	-15.6%	-26.8%
		% of Total	2.7%	3.6%	2.9%
Subtotal	Arrivals	190,721	109,426	239,811	
	YOY%	18.5%	1.6%	-1.9%	
	% of Total	78.8%	74.0%	70.3%	
Air Arrivals via the US	All airports	Arrivals	28,833	17,969	35,821
		YOY%	-34.7%	-8.7%	-7.0%
		% of Total	11.9%	12.2%	10.5%
Sea Arrivals	All sea borders	Arrivals	487	3,994	17,007
		YOY%	7.7%	-37.4%	16.1%
		% of Total	0.2%	2.7%	5.0%
Land Arrivals via US	All land borders	Arrivals	22,020	16,498	48,309
		YOY%	70.9%	-3.6%	179.1%
		% of Total	9.1%	11.2%	14.2%
Total Overnight Arrivals		242,061	147,887	340,948	

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

ASIA-PACIFIC

Destination Canada Asia-Pacific Overnight Arrivals to Canada

CURRENT MONTH:

-3.1% ↓ YOY



YTD:

+0.3% ↑ YOY

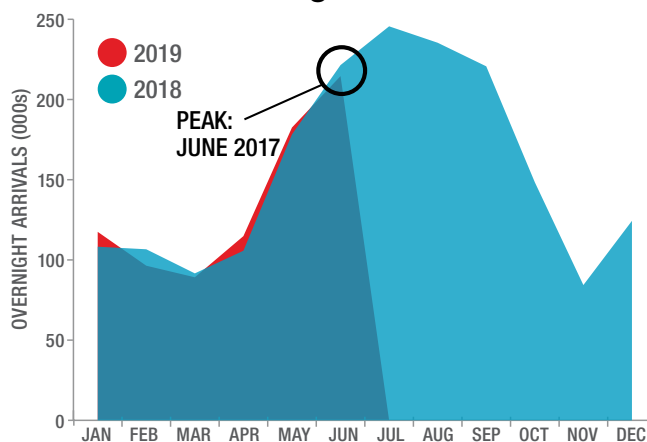
Overnight Arrivals

	June 2019		YTD 2019	
	Arrivals	% YOY Variance	Arrivals	% YOY Variance
Destination Canada Asia-Pacific	214,595	-3.1	814,449	0.3
Australia	44,105	-2.7	155,769	2.7
China	73,620	-1.6	303,091	-0.9
India	52,354	13.7	169,705	18.7
Japan	20,492	-13.2	98,042	-3.0
South Korea	24,024	-24.1	87,842	-20.3
Other Asia-Pacific	130,637	7.1	414,022	10.8
Hong Kong	22,561	19.0	76,073	12.9
Taiwan	14,559	-11.4	53,517	-8.7
Rest of Asia-Pacific	93,517	8.1	284,432	14.9
Total Asia-Pacific	345,232	0.5	1,228,471	3.6



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

Trend Plot: Total Destination Canada Asia-Pacific Overnight Arrivals to Canada



Asia-Pacific: Key Indicators

		Australia	China	India	Japan	South Korea
Air Seat Capacity ⁱ	June 2019	5.5%	-4.9%	-51.9%	-6.0%	8.3%
	YTD	14.7%	1.6%	-14.5%	5.6%	-1.2%
Exchange Rate ⁱⁱ	June 2019	-6.2%	-5.1%	-1.1%	3.1%	-5.5%
	YTD	-4.5%	-2.1%	-2.1%	3.0%	-2.0%
YTD Arrival Peak ⁱⁱⁱ	Peak Year	2017	2018	2018	1996	2017
	Current % of Previous Peak	97.8%	99.1%	118.7%	38.3%	74.4%

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.

- Canada welcomed close to 215,000 overnight visitors from Destination Canada's Asia-Pacific region in June 2019, down 3.1% compared to June 2018. With year-to-date overnight arrivals (814,000) still marginally ahead of the same period last year (+0.3%), this region still hit a new record for overnight arrivals in the first half of the year and maintained its position as Destination Canada's largest region.
- In the peak travel month for Indian visitors to Canada (during the Indian school summer holiday period), India was the only market in this region to record an increase in overnight arrivals in June 2019 (+13.7%), and also led the region in year-to-date growth (+18.7%). With this performance, India was the second largest market for overnight arrivals from this region (after China), and fifth among Destination Canada's long-haul markets (behind UK, China, France and Mexico).
- The ongoing decline from China appears to be accelerating, with direct air arrivals falling -6.0% year-over-year in June 2019, compared with -5.4% year-over-year in May and April. However, year-to-date overnight arrivals from China overall see a minimal decline (-0.9%) following 15 years of continuous growth. Air arrivals via the US were down 18.9% in June 2019.
- While total arrivals from South Korea continued to decline in June 2019 (-24.1%), including a downward shift in non-land arrivals (-4.1%), year-to-date non-land arrivals were still on par with 2018 levels (+0.1% year-to-date).

Destination Canada Asia-Pacific Arrivals by Port of Entry

- Over the first half of 2019, close to two-thirds of visitors from Destination Canada's Asia-Pacific region flew to Canada direct from overseas (66.3%), primarily flying into YVR and YYZ.

Year-to-date Overnight Arrivals by Port of Entry

			Australia	China	India	Japan	South Korea
Air Arrivals from Overseas	YYZ	Arrivals	6,155	89,674	67,631	16,511	23,195
		YOY%	-11.4%	-3.4%	0.5%	-21.9%	-0.4%
		% of Total	4.0%	29.6%	39.9%	16.8%	26.4%
	YVR	Arrivals	60,836	113,042	48,638	42,855	30,754
		YOY%	8.7%	-4.4%	50.2%	-0.0%	-3.2%
		% of Total	39.1%	37.3%	28.7%	43.7%	35.0%
	YUL	Arrivals	1,216	16,436	4,580	4,162	567
		YOY%	14.0%	1.4%	-2.4%	94.7%	22.7%
		% of Total	0.8%	5.4%	2.7%	4.2%	0.6%
	YYC	Arrivals	726	4,025	4,599	2,509	289
		YOY%	2.1%	-16.8%	-23.9%	-41.6%	-33.1%
		% of Total	0.5%	1.3%	2.7%	2.6%	0.3%
	All other airports	Arrivals	402	222	958	197	74
		YOY%	32.7%	-21.6%	-12.8%	233.9%	7.2%
		% of Total	0.3%	0.1%	0.6%	0.2%	0.1%
Subtotal	Arrivals	69,335	223,399	126,406	66,234	54,879	
	YOY%	6.7%	-3.9%	13.4%	-6.1%	-2.1%	
	% of Total	44.5%	73.7%	74.5%	67.6%	62.5%	
Air Arrivals via the US	All airports	Arrivals	52,371	28,958	18,237	18,815	13,312
		YOY%	-4.2%	-18.2%	5.1%	-3.0%	7.0%
		% of Total	33.6%	9.6%	10.7%	19.2%	15.2%
Sea Arrivals	All sea borders	Arrivals	17,431	4,596	5,371	2,170	2,466
		YOY%	-3.4%	20.8%	9.0%	8.1%	15.2%
		% of Total	11.2%	1.5%	3.2%	2.2%	2.8%
Land Arrivals via US	All land borders	Arrivals	16,632	46,138	19,691	10,823	17,185
		YOY%	18.9%	34.3%	115.2%	18.7%	-56.7%
		% of Total	10.7%	15.2%	11.6%	11.0%	19.6%
Total Overnight Arrivals			155,769	303,091	169,705	98,042	87,842

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

	June 2019	YOY % Variance	Year-to-date	YOY^ % Variance
United States	1,516,197	-0.8	9,867,140	-5.1
Other Countries	780,582	3.9	6,850,553	3.3
Total Trips from Canada	2,296,779	0.8	16,717,693	-1.8

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

- Canadians took 2.30 million international overnight trips in June 2019, a slight increase over June 2018 (+0.8%). Overnight trips to overseas international destinations increased year-over-year (781,000 trips, +3.9%), but that growth was outweighed by a slight year-over-year decline in overnight trips to the US (1.52 million trips -0.8%).
- Over the first half of 2019, Canadians travelled internationally slightly less than they did over the same period in 2018 (16.72 million trips, -1.8%). The decline was due to a decrease in overnight travel to the US (9.87 million trips, -5.1%), which outweighed an increase in Canadian overnight travel to other international destinations (6.85 million trips, +3.3%).
- The decline in Canadian overnight travel to the US in June 2019 was attributable to fewer Canadians returning from the US by air (-4.4% in June), and particularly by other modes of transportation, such as bus, train, or cruise (-16.4%). These declines outpaced an increase in Canadians returning from the US by automobile (+3.7%) in June – the first monthly increase in Canadians driving across the border so far in 2019.
- It is important to note that starting with January 2019 data, Statistics Canada updated the method of determining trip durations for US residents travelling to Canada and Canadian residents returning from the United States for non-automobile modes of transportation. This change affects the relative proportions of same-day/overnight travellers. Caution is therefore advised when comparing this 2019 data with earlier time periods.

INTERNATIONAL ARRIVALS BY PROVINCE OF ENTRY

Year-to-date Overnight Arrivals by Province of Entry

		Newfoundland and Labrador	Prince Edward Island	Nova Scotia	New Brunswick	Quebec	Ontario
Total One or more nights	2019	11,112	62	55,899	100,310	1,374,063	4,136,816
	Variance YOY%	-37.6%	-10.1%	-13.4%	7.5%	6.9%	4.8%
	Change YOY	-6,702	-7	-8,621	6,995	89,156	188,800
US Residents by Automobile	2019	0	0	0	77,625	459,393	1,746,255
	Variance YOY%	0.0%	0.0%	-100.0%	2.4%	3.0%	2.8%
	Change YOY	-	-	-2,796	1,835	13,529	47,384
US Residents by Non-Automobile	2019	1,477	49	38,534	18,822	400,742	1,114,778
	Variance YOY%	-49.0%	2.1%	0.8%	30.2%	7.5%	2.0%
	Change YOY	-1,417	1	298	4,363	27,809	22,008
Residents from Other Countries	2019	9,635	13	17,365	3,863	513,928	1,275,783
	Variance YOY%	-35.4%	-38.1%	-26.1%	26.0%	10.3%	10.3%
	Change YOY	-5,285	-8	-6,123	797	47,818	119,408

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

Year-to-date Overnight Arrivals by Province of Entry

		Manitoba	Saskatchewan	Alberta	British Columbia	Yukon	Nunavut	CANADA
Total One or more nights	2019	109,855	35,561	455,936	2,690,285	66,500	296	9,036,695
	Variance YOY%	8.6%	10.2%	4.0%	2.4%	-4.9%	8.0%	4.1%
	Change YOY	8,674	3,291	17,545	62,224	-3,455	22	357,922
US Residents by Automobile	2019	68,464	26,372	59,561	865,085	29,037	0	3,331,792
	Variance YOY%	0.8%	12.0%	2.8%	2.3%	-2.3%	0.0%	2.6%
	Change YOY	545	2,834	1,644	19,470	-674	-	83,771
US Residents by Non-Automobile	2019	34,687	7,916	261,013	846,447	32,952	23	2,757,440
	Variance YOY%	20.8%	3.0%	7.9%	1.0%	-5.8%	-48.9%	3.2%
	Change YOY	5,963	234	19,087	8,213	-2,018	-22	84,519
Residents from Other Countries	2019	6,704	1,273	135,362	978,753	4,511	273	2,947,463
	Variance YOY%	47.7%	21.2%	-2.3%	3.7%	-14.5%	19.2%	6.9%
	Change YOY	2,166	223	-3,186	34,541	-763	44	189,632

- June 2019 continues the trends noted in May – that Ontario (45.8%), British Columbia (29.8%), Quebec (15.2%) and Alberta (5.0%) receive the most international overnight arrivals, and that Nova Scotia and Newfoundland continue to contract (-13.4% and -37.6%) potentially as a result of a contraction of air capacity due to the grounding of the Boeing 737 MAX 8 jets.
- New Brunswick and Manitoba far exceeded the national average (3.2%) for US non-auto traffic (up 30.2% and 20.8%), as they were not driven down by low US arrivals via cruise.

ACCOMMODATION

Hotel Performance Indicators by Province

	Occupancy Rates				Average Daily Rate (ADR)				Revenue Per Available Room (RevPAR)			
	June 2019	YOY [^] Variance	Year-to-date	YOY [^] Variance	June 2019	YOY % Variance	Year-to-date	YOY % Variance	June 2019	YOY % Variance	Year-to-date	YOY % Variance
Alberta ¹	60.6%	-2.1	53.2%	-0.8	\$131.88	-1.6%	\$127.75	-1.3%	\$79.89	-4.8%	\$67.91	-2.8%
British Columbia	80.8%	1.0	68.8%	0.8	\$224.03	6.5%	\$185.65	3.9%	\$181.00	7.9%	\$127.74	5.2%
Saskatchewan	57.6%	-2.7	54.0%	-1.3	\$118.92	-0.4%	\$118.48	-0.3%	\$68.53	-4.8%	\$63.92	-2.7%
Manitoba	72.4%	-2.7	65.7%	-0.5	\$127.76	-2.0%	\$126.02	-0.2%	\$92.55	-5.5%	\$82.81	-1.0%
Ontario	77.8%	-0.6	65.5%	-1.1	\$171.27	0.0%	\$159.27	2.1%	\$133.28	-0.8%	\$104.30	0.5%
Quebec	78.2%	-0.8	64.6%	0.0	\$198.36	-1.1%	\$169.17	2.2%	\$155.14	-2.1%	\$109.28	2.2%
New Brunswick	68.4%	0.5	53.4%	-1.1	\$129.14	2.2%	\$121.83	1.6%	\$88.38	2.9%	\$65.10	-0.3%
Nova Scotia	75.8%	-0.5	60.2%	-0.4	\$155.68	-3.2%	\$138.73	-1.3%	\$117.98	-3.8%	\$83.46	-2.0%
Newfoundland and Labrador	72.2%	5.6	49.2%	2.0	\$145.85	-6.4%	\$128.79	-7.5%	\$105.36	1.4%	\$63.38	-3.6%
Prince Edward Island	71.2%	2.1	51.3%	2.6	\$163.66	-2.5%	\$133.17	0.1%	\$116.61	0.4%	\$68.30	5.4%
Northwest Territories	48.2%	-16.3	60.3%	-11.0	\$142.31	-1.4%	\$147.23	-1.4%	\$68.62	-26.3%	\$88.71	-16.6%
Yukon	84.6%	-6.4	59.4%	0.1	\$170.09	8.9%	\$144.73	4.9%	\$143.90	1.3%	\$85.99	5.1%
Canada	73.9%	-0.8	62.4%	-0.5	\$178.83	1.4%	\$158.21	1.8%	\$132.07	0.4%	\$98.65	0.9%

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.

Users of this information are advised that CBRE Hotels does not represent the information contained herein to be definitive or all-inclusive. CBRE Hotels believes the information to be reliable, but is not responsible for errors or omissions.

- For a second consecutive month, the national average occupancy rate in June 2019 was marginally below the same month a year ago (73.9%, down 0.8 percentage points), bringing the year-to-date rate for the first half of 2019 to 62.4%, a marginal -0.5 percentage points below the average rate in the first half of 2018.
- Over the first half of 2019, the highest occupancy rates were recorded in British Columbia, Manitoba, and Ontario. The year-over-year decline was seen across most provinces and territories, with only Prince Edward Island, Newfoundland, British Columbia, and Yukon recording higher rates compared to the first half of 2018.
- The national average daily rate (ADR) continued to slowly climb, currently sitting at \$158.21 (+1.8%) for the first half of 2019. However, that growth was not consistent across the country – only about half of the provinces and territories reported year-over-year increases in ADR, led by Yukon, British Columbia, and Quebec.
- From January to June 2019, the national revenue per available room (RevPar) increased only marginally year-over-year (\$98.65, +0.9%), with only a few provinces and territories recording gains. British Columbia, Quebec and Ontario reported the highest RevPar year-to-date, with year-over-year growth led by Prince Edward Island, British Columbia and Yukon.

ACCOMMODATION

Hotel Performance Indicators by Property Type

	Occupancy Rates				Average Daily Rate (ADR)			
	June 2019	YOY^ Change	Year-to-date	YOY^ Variance	June 2019	YOY Variance	Year-to-date	YOY Variance
Property Size								
Under 50 rooms	63.5%	0.5	49.9%	1.6	\$127.99	-0.3%	\$116.38	3.5%
50-75 rooms	68.6%	0.2	55.7%	-0.0	\$130.76	1.3%	\$116.76	1.1%
76-125 rooms	71.3%	-1.0	60.3%	-0.9	\$145.29	1.4%	\$131.73	1.4%
126-200 rooms	73.8%	-1.0	63.0%	-0.5	\$162.09	0.7%	\$145.32	1.3%
201-500 rooms	77.0%	-1.1	66.3%	-0.4	\$213.12	1.6%	\$188.74	2.0%
Over 500 rooms	84.6%	0.0	69.6%	-1.3	\$289.68	3.2%	\$238.37	3.8%
Total	73.9%	-0.8	62.4%	-0.5	\$178.83	1.4%	\$158.21	1.8%
Property Type								
Limited Service	68.9%	-0.4	57.6%	-0.2	\$129.93	1.0%	\$120.05	1.7%
Full Service	76.8%	-1.1	65.0%	-0.7	\$198.86	1.7%	\$172.67	2.3%
Suite Hotel	79.9%	-0.8	70.1%	-0.9	\$181.47	-0.6%	\$162.03	0.2%
Resort	72.9%	-0.2	60.1%	0.0	\$289.68	6.2%	\$247.65	3.0%
Total	73.9%	-0.8	62.4%	-0.5	\$178.83	1.4%	\$158.21	1.8%
Price Level								
Budget	68.1%	-0.6	56.5%	0.2	\$117.39	1.8%	\$106.69	2.7%
Mid-Price	74.1%	-1.0	62.7%	-0.8	\$165.52	1.2%	\$147.56	1.6%
Upscale	80.4%	0.2	68.2%	-0.2	\$305.38	2.2%	\$257.82	1.7%
Total	73.9%	-0.8	62.4%	-0.5	\$178.83	1.4%	\$158.21	1.8%

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

- From January to June 2019, occupancy rates continued to increase by property size, ranging from 49.9% for properties with under 50 rooms to 69.6% for properties with over 500 rooms. However, only the smallest properties (<50 rooms) reported year-over-year growth in average occupancy rate.
- Average Daily Rate also increased by property size, ranging from \$116.38 to \$238.37 year-to-date. While this measure increased across all property sizes, the strongest growth was reported from properties with over 500 rooms (+3.8%) and those with under 50 rooms (+3.5%).
- Over the first half of 2019, suite properties reported the highest occupancy rates (70.1%), while resorts reported the highest Average Daily Rate (\$247.65). The slight decline in average occupancy rates and slight increase in Average Daily Rate over this period was reported across property types.