Tourism Snapshot

April 2018
Volume 14, Issue 3

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

DESTINATION CANADA
Canadä
www.destinationcanada.com

KEY HIGHLIGHTS

- Following an exceptionally strong Easter performance boost in overnight arrivals from Destination Canada's 10 core markets in April 2017 (+14.7%, including +37.0% for long-haul and +9.3% for US), visitation from these markets contracted in April 2018 (-7.8%, including -8.2% for long-haul and -7.7% for US). This decline was expected following the strong Easter showing that took place in March this year.

- Year-to-date April 2018, overnight arrivals to Canada reached 4.3 million visitors to establish a new peak, up 3.9% over the previous record set in 2017.

- In April 2018, arrivals from Destination Canada's long-haul markets (-8.2%) were characterized by mixed results as gains from China (+19.6%), India (+11.2%), France (+9.5%), and Australia (+2.2%) were outpaced by contractions from the other Destination Canada long-haul markets, including the UK (-29.3%), Mexico (-26.7%), Germany (-23.8%), South Korea (-7.8%), and Japan (-3.1%).
  - The contractions in arrivals from these markets came on the heel of exceptionally high Easter-related showings in April 2017 (UK +47.9%; Mexico +126.1%; Germany +45.7%; South Korea +39.7%).
  - In comparing April 2018 to April 2016 (the last time Easter fell in March), Destination Canada's nine long-haul markets expanded by a robust 26.5%.

- Overnight arrivals from US residents dipped in April 2018 (-7.7%) as a result of a double-digit contraction in auto arrivals (-16.0%), which overshadowed continued robust gains in arrivals by air (3.0%) and other modes of entry (6.6%).
  - Over the total Easter period of March and April, US overnight arrivals progressed by 3.1%, relative to the same period in 2017, as growth from air (+7.6%) and other modes of entry (+9.3%) stood in contrast to subdued arrivals by automobile (-0.6%).

- Year-to-date, overnight arrivals from Destination Canada's long-haul markets reached a record high of 886,000 visitors, up 4.8% compared to the first four months of 2017, while the arrival of 2.9 million visitors from the US, up 3.6%, represented the highest level of US overnight visitation to Canada since 2005.

Note the following caveat from Statistics Canada associated with the April 2018 data:
Data for Statistics Canada's Frontier Counts program are produced using administrative data received from the Canada Border Services Agency (CBSA) on all international travellers who have been cleared for entry or re-entry into Canada. This includes residents of Canada, the United States and overseas entering Canada from abroad.

In 2017, the CBSA began introducing the electronic Primary Inspection Kiosk (PIK) system at airports in Canada. The PIK system replaces the E-311 Declaration Cards that are completed by international travellers to Canada. As of the end of November, the PIK system was deployed at the following airports: Macdonald-Cartier, Ottawa (March 2017), Vancouver (April 2017), Toronto International Airport T3 (June 2017), Edmonton (September 2017), Halifax (October 2017), and Pierre-Elliot Trudeau, Montréal (November 2017).

While waiting for the introduction of PIK data into the frontier counts in the near future, Statistics Canada has prepared preliminary estimates for airports at which PIK has been deployed. These estimates are based on CBSA reports of total international travellers by airport, while the distribution between Canadian, US and travellers from individual overseas countries are modelled estimates based on historical data and trends, using methods similar to those used to do seasonal adjustment.

QUICK LINKS

Industry Performance Dashboard

	April 2018	YTD
Overnight Arrivals[1]		
Total International	↓ 7.7%	↑ 3.9%
10 DC Markets*	↓ 7.8%	↑ 3.9%
United States	↓ 7.7%	↑ 3.6%
9 Long-Haul Markets	↓ 8.2%	↑ 4.8%
Non-DC Markets	↓ 7.4%	↑ 3.7%
Air Seat Capacity[2]		
Total International	↑ 4.5%	↑ 5.8%
10 DC Markets*	↑ 5.1%	↑ 5.3%
Non-DC Markets	↑ 3.3%	↑ 6.8%
National Hotel Indicators[3]		
Occupancy Rate**	↑ 1.1	↑ 1.3
Revenue Per Available Room (Revpar)	↑ 4.1%	↑ 4.5%
Average Daily Rate (ADR)	↑ 5.9%	↑ 6.9%

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

		Overnight Arrivals[i]		Arrival YOY Variations (%)		Air Seat capacity[ii]		Local currency vs. CAD[iii]	
	Market	Apr. 2018	YTD 2018	Apr. 2018	YTD 2018	Apr. 2018	YTD 2018	Apr. 2018 Average	YTD Average
DC North America	United States	812,871	2,892,807	-7.7%	3.6%	3.9%	4.3%	-5.3%	-4.6%
	Mexico	27,455	102,314	-26.7%	6.8%	65.8%	74.2%	-3.2%	1.8%
DC Europe	France	35,417	125,377	9.5%	9.3%	-4.3%	-1.2%	8.5%	9.8%
	Germany	19,514	66,376	-23.7%	-3.5%	-0.7%	-1.1%	8.5%	9.8%
	United Kingdom	41,333	146,958	-29.3%	-10.5%	5.6%	2.6%	5.4%	6.9%
DC Asia-Pacific	Australia	18,590	74,927	2.2%	5.6%	-0.6%	4.7%	-3.4%	-1.5%
	China	47,372	178,401	19.6%	23.9%	12.5%	6.1%	3.6%	3.6%
	India	22,019	62,387	11.2%	21.3%	20.7%	27.8%	-6.9%	-2.2%
	Japan	15,523	67,234	-3.1%	-11.3%	3.7%	-0.5%	-3.0%	-0.6%
	South Korea	17,841	62,213	-7.8%	4.4%	2.7%	11.8%	0.6%	2.1%
Total 10 DC Markets		**1,057,935**	**3,778,994**	**-7.8%**	**3.9%**				
Rest of the World		**153,787**	**528,787**	**-7.4%**	**3.7%**				
Total International		**1,211,722**	**4,307,781**	**-7.7%**	**3.9%**				

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:

-7.7% ↓ YOY

YTD:

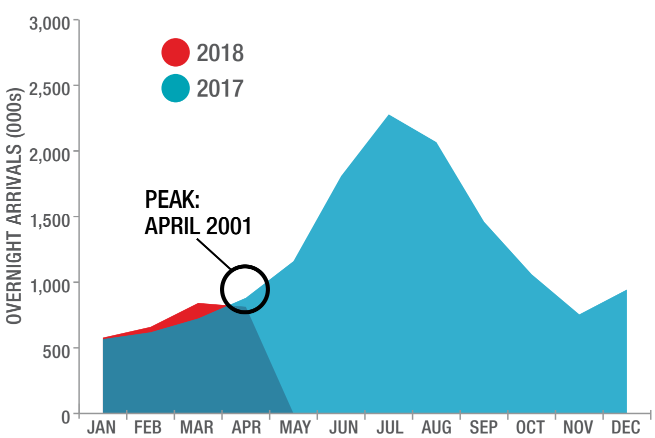
+3.6% ↑ YOY

Overnight Arrivals

	April 2018		YTD 2018	
	Arrivals	% YOY Variance	Arrivals	% YOY Variance
Automobile	422,867	-16.0	1,541,395	-1.0
Air	325,942	3.0	1,175,820	9.9
Other	64,062	6.6	175,592	7.1
US Total	**812,871**	**-7.7**	**2,892,807**	**3.6**

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

Trend Plot: Total United States Arrivals



United States: Key Indicators

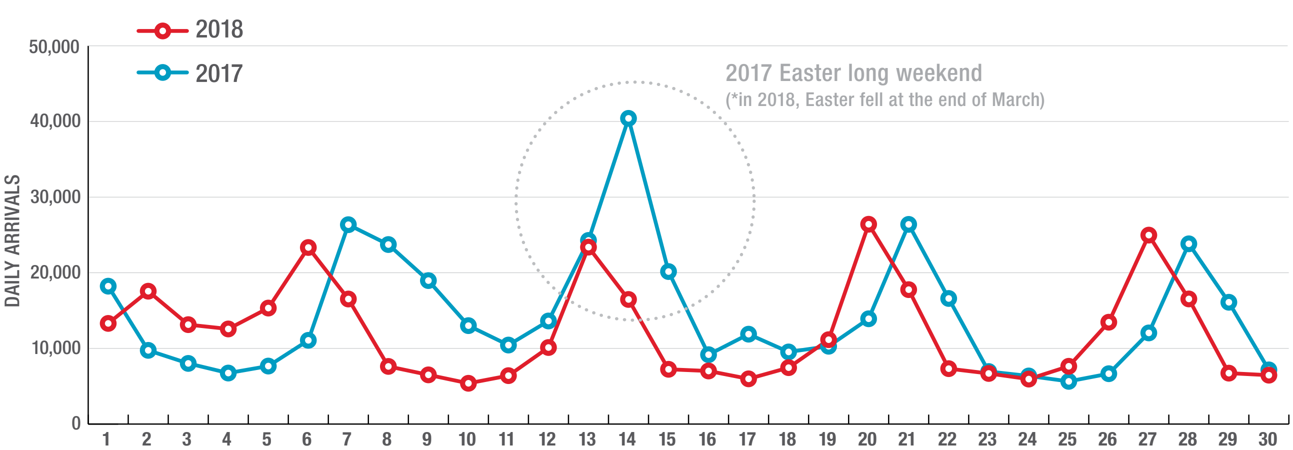
Air Seat Capacity[i]	April 2018	3.9%
	YTD	4.3%
Exchange Rate[ii]	April 2018	-5.3%
	YTD	-4.6%
Consumer Confidence Index (1985=100)[iii]	April 2018	125.6
	Previous Month	127.0
YTD Arrival Peak[iv]	Peak Year	2002
	Current % of Previous Peak	91.1%

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

- As expected with the Easter shift this year, arrivals from the US were down year-over-year in the month of April, falling to 813,000, -7.7%. The decline was driven by fewer monthly auto arrivals (-16.0%), which overshadowed the continued growth in both air arrivals (+3.0%) and arrivals by other modes of transportation such a bus, train, and cruise (+6.6%).
- Looking at the months of March and April together to account for the Easter effect, US visitation to Canada was still ahead of the same period last year. Total US arrivals over those two months were up +3.1%, with only marginally fewer auto arrivals (-0.6%) and continued strong performance by air (+7.6%) and other modes (+9.3%).
- Year-to-date over the first four months of 2018, 2.9 million US tourists visited Canada, +3.6% over the same period of 2017. This is the highest level of US arrivals for this period since 2005. A small decline in auto arrivals (-1.0%) was offset by continued healthy progress in air arrivals (+9.9%) and arrivals by other modes of transport (+7.1%).
- While the USD currency is not currently as strong in Canada as it was a year ago (-5.3% in April, -4.6% YTD), the generally positive performance from the US market, particularly in air arrivals, was supported by the steady expansion of air capacity between the US and Canada (+3.9% in April, +4.3% YTD).
- As previously explained concerning the surge seen in March, the sudden drop in US arrivals in April 2018 relative to April 2017 is largely attributable to travels over the Easter long weekend, which this year fell at the end of March, while last year the increased long weekend arrivals occurred in mid-April. Once again this trend can be observed in the April daily vehicle arrivals data[1], which shows the typical weekend peaks in both 2017 and 2018, but a particularly large spike in US visitors driving across the border over the Easter weekend in 2017.
- The largest share of US vehicle arrivals originated from Washington (21.1% in April, 22.0% YTD), New York (20.2% in April, 20.0% YTD), and Michigan (11.7% in April, 11.9% YTD)[2]. In April 2018, particularly notable declines in vehicle arrivals to Canada were seen from Pennsylvania, New Jersey, Ohio, and New York.
- The consumer confidence index published by the US Conference Board saw a modest decline of 1.4 points in April 2018 (after a downward revision), currently sitting at 125.6.

Daily US Overnight Auto Arrivals – April 2018



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

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

[2] Some automobiles driven across the border may be rental vehicles. Rented vehicles in one US state may be registered in different state.

MEXICO

Mexico Arrivals to Canada

CURRENT MONTH:

-26.7% ↓ YOY

YTD:

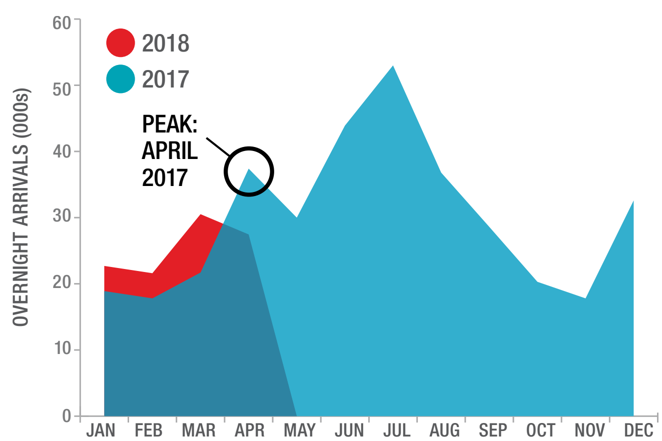
+6.8% ↑ YOY

Overnight Arrivals

	April 2018		YTD 2018	
	Arrivals	% YOY Variance	Arrivals	% YOY Variance
Mexico	27,455	-26.7	102,314	6.8

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[i]	April 2018	65.8%
	YTD	74.2%
Exchange Rate[ii]	April 2018	-3.2%
	YTD	1.8%
YTD Arrival Peak[iii]	Peak Year	2017
	Current % of Previous Peak	106.8%

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

- After two and a half years of consecutive year-over-over growth, monthly arrivals from Mexico declined in April 2018 (-26.7%). This sudden downturn can be attributed to a combination of the Easter effect (with Easter falling in April in 2017 and in March in 2018), and particularly strong arrivals growth from this market in early 2017 following the replacement of the visa requirement for Mexican citizens with the eTA in December 2016 (+126.1% in April 2017). When the months of March and April are combined to account for the Easter effect, arrivals from Mexico are only marginally lower than the same period last year (-1.9%).
- Arrivals from Mexico over the first four months of 2018 reached a new record peak of 102,000 visitors (+6.8%), passing the 100,000 visitor mark a month earlier than last year.
- In April 2018, the drop in arrivals was observed across modes of entry, with fewer visitors coming to Canada directly by air as well as via the US by air and by land. However, the biggest declines were recorded in visitors arriving via the US. Year-to-date, direct air arrivals from Mexico were still well ahead of the same period a year ago, while arrivals via the US both by land and by air were significantly down.
- Direct air capacity to Canada continued to expand rapidly, both in April 2018 (+65.8%) and year-to-date (+74.2%), supporting the more than 80% of Mexican travellers who flew directly to Canada over this period. While the strength of the Mexican Peso in Canada waned slightly in April 2018 (-3.2%), overall it remained in a relatively good position over the first four months of 2018 (+1.8%).

Mexico Arrivals by Port of Entry

- Among the majority of visitors from Mexico who flew directly to Canada, the largest proportion (41.0%) flew into YYZ, followed by almost equal numbers flying into YVR (27.2%) or YUL (27.5%). YYC (+208.2%) and YUL (+126.9%) saw the largest year-over-year increases in arrivals from Mexico.

			Mexico
Air Arrivals from Overseas	YYZ	Arrivals	34,008
		YOY%	24.1%
		% of Total	**33.2%**
	YVR	Arrivals	22,617
		YOY%	12.9%
		% of Total	**22.1%**
	YUL	Arrivals	22,815
		YOY%	126.9%
		% of Total	**22.3%**
	YYC	Arrivals	2,971
		YOY%	208.2%
		% of Total	**2.9%**
	All other airports	Arrivals	595
		YOY%	1.0%
		% of Total	**0.6%**
	Subtotal	Arrivals	83,006
		YOY%	40.2%
		% of Total	**81.1%**
Air Arrivals via the US	All airports	Arrivals	13,902
		YOY%	-29.7%
		% of Total	**13.6%**
Sea Arrivals	All sea borders	Arrivals	147
		YOY%	153.4%
		% of Total	**0.1%**
Land Arrivals via US	All land borders	Arrivals	5,259
		YOY%	-68.4%
		% of Total	**5.1%**
Total Overnight Arrivals			**102,314**

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:

-17.3% ↓ YOY

YTD:

-2.6% ↓ YOY

Overnight Arrivals

	April 2018		YTD 2018	
	Arrivals	% YOY Variance	Arrivals	% YOY Variance
DC Europe	**96,264**	**-17.3**	**338,711**	**-2.6**
United Kingdom	41,333	-29.3	146,958	-10.5
France	35,417	9.5	125,377	9.3
Germany	19,514	-23.7	66,376	-3.5
Other Europe	**63,640**	**-55.0**	**218,240**	**22.3**
Italy	6,290	-0.3	19,949	6.0
Netherlands	8,559	-9.3	25,294	2.8
Spain	4,809	-17.9	17,043	16.0
Switzerland	6,688	-19.5	21,744	-7.0
Rest of Europe	37,294	-8.1	134,210	4.3
Total Europe	**159,904**	**-14.4**	**556,951**	**-0.2**

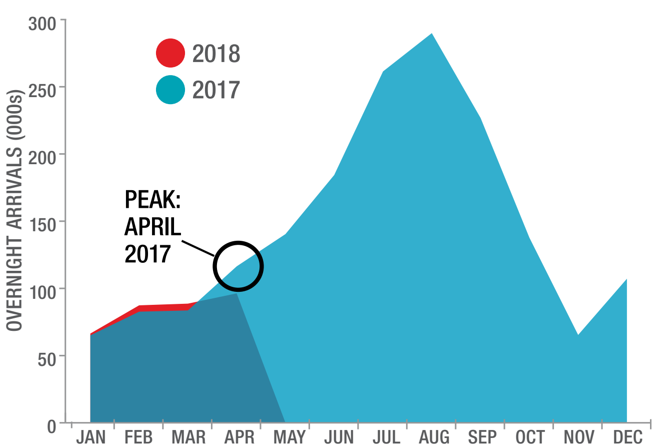
Source: Statistics Canada, Frontier counts, custom tabulations.
Note: The figures are preliminary estimates and are subject to change.

DC Europe: Key Indicators

		France	Germany	United Kingdom
Air Seat Capacity[i]	April 2018	-4.3%	-0.7%	5.6%
	YTD	-1.2%	-1.1%	2.6%
Exchange Rate[ii]	April 2018	8.5%	8.5%	5.4%
	YTD	9.8%	9.8%	6.9%
YTD Arrival Peak[iii]	Peak Year	2017	2017	2001
	Current % of Previous Peak	109.3%	96.5%	75.7%

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

- After a strong first quarter, arrivals from Destination Canada's Europe region took a sharp dive in April 2018 (-17.3% vs. April 2017), bringing the year-to-date total down to slightly below the same period last year (-2.6%), this despite the strong purchasing power of both the Euro and British Pound currencies in Canada. April arrivals from this region fell below the 100,000 mark after surpassing that milestone for only the second time last year with a monthly record of 116,000 visitors.

- With 35,000 visitors in April 2018 (+9.5%), France was the only market from this region to see a year-over-year increase in monthly arrivals, also hitting a new monthly arrivals record. Year-to-date arrivals from this market (+9.3%) also set a new record. With direct air capacity to Canada contracting (-4.3% in April, -1.2% YTD), the biggest growth from this market was in land arrivals via the US.

- Arrivals from Germany declined sharply in April 2018 (20,000 visitors, -23.7%), bringing the YTD count down to 66,000 (-3.5%), following remarkable arrivals peaks in 2017 (both for April and YTD). Though air capacity to Canada was only marginally down (-0.7% in April, -1.1% YTD), the biggest declines from this market were in air arrivals – both direct and via the US.

- Following last year's outstanding performance, which was the biggest April for UK arrivals since 2000, UK arrivals in April 2018 declined -29.3% year-over-year, bringing year-to-date arrivals to 147,000 (-10.5%). This can primarily be attributed to the peak in Easter visitation shifting to March this year (vs. April in 2017) – UK arrivals for both April and YTD are slightly ahead of 2016, the last time Easter fell in March. Despite increased air capacity (+5.6% in April, +2.6% YTD), arrivals from the UK declined across both land and air arrivals (direct and via the US).

DC Europe Arrivals by Port of Entry

- Year-to-date, three quarters of the arrivals from Destination Canada's Europe region were direct air arrivals (74.2%). Visitors from these markets primarily landed at YUL (35.9%) or YYZ (34.6%).

			France	Germany	UK
Air Arrivals from Overseas	YYZ	Arrivals	14,665	22,548	49,767
		YOY%	-15.5%	-14.4%	-16.6%
		% of Total	**11.7%**	**34.0%**	**33.9%**
	YVR	Arrivals	3,772	9,762	30,167
		YOY%	35.7%	-5.2%	-6.8%
		% of Total	**3.0%**	**14.7%**	**20.5%**
	YUL	Arrivals	68,467	8,808	12,917
		YOY%	22.3%	16.2%	12.7%
		% of Total	**54.6%**	**13.3%**	**8.8%**
	YYC	Arrivals	814	5,134	17,020
		YOY%	-18.8%	6.5%	-2.1%
		% of Total	**0.6%**	**7.7%**	**11.6%**
	All other airports	Arrivals	880	1,475	5,046
		YOY%	1.1%	3.0%	4.6%
		% of Total	**0.7%**	**2.2%**	**3.4%**
	Subtotal	Arrivals	88,598	47,727	114,917
		YOY%	12.9%	-4.6%	-7.7%
		% of Total	**70.7%**	**71.9%**	**78.2%**
Air Arrivals via the US	All airports	Arrivals	30,706	12,337	23,838
		YOY%	-0.7%	-10.7%	-3.4%
		% of Total	**24.5%**	**18.6%**	**16.2%**
Sea Arrivals	All sea borders	Arrivals	59	1,240	956
		YOY%	-71.5%	942.0%	247.6%
		% of Total	**0.0%**	**1.9%**	**0.7%**
Land Arrivals via US	All land borders	Arrivals	6,014	5,072	7,247
		YOY%	25.1%	28.9%	-45.9%
		% of Total	**4.8%**	**7.6%**	**4.9%**
Total Overnight Arrivals			**125,377**	**66,376**	**146,958**

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:

+7.4% ↑ YOY

YTD:

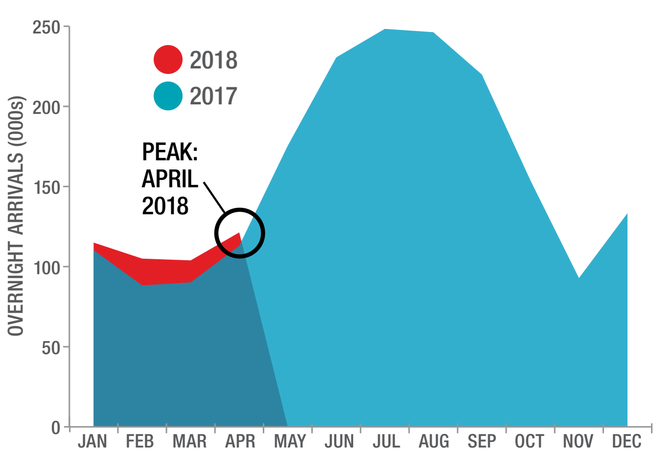
+10.8% ↑ YOY

Overnight Arrivals

	April 2018		YTD 2018	
	Arrivals	% YOY Variance	Arrivals	% YOY Variance
DC Asia-Pacific	**121,345**	**7.4**	**445,162**	**10.8**
Australia	18,590	2.2	74,927	5.6
China	47,372	19.6	178,401	23.9
India	22,019	11.2	62,387	21.3
Japan	15,523	-3.1	67,234	-11.3
South Korea	17,841	-7.8	62,213	4.4
Other Asia-Pacific	**48,471**	**-8.8**	**162,640**	**12.4**
Hong Kong	8,078	-27.9	30,790	-13.0
Taiwan	6,399	28.0	23,462	24.3
Rest of Asia-Pacific	33,994	-9.0	108,388	1.1
Total Asia-Pacific	**169,816**	**2.0**	**607,802**	**7.9**

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

Trend Plot: Total DC Asia-Pacific Arrivals



Asia-Pacific: Key Indicators

		Australia	China	India	Japan	South Korea
Air Seat Capacity[i]	Apr. 2018	-0.6%	12.5%	20.7%	3.7%	2.7%
	YTD	4.7%	6.1%	27.8%	-0.5%	11.8%
Exchange Rate[ii]	Apr. 2018	-3.4%	3.6%	-6.9%	-3.0%	0.6%
	YTD	-1.5%	3.6%	-2.2%	-0.6%	2.1%
YTD Arrival Peak[iii]	Peak Year	2017	2017	2017	1997	2017
	Current % of Previous Peak	105.6%	123.9%	121.3%	51.2%	104.4%

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.

- Destination Canada's Asia-Pacific region was the only region to record a year-over-year increase in arrivals in April 2018 (121,000, +7.4%), bringing year-to-date arrivals to 445,000 (+10.8%). The region set new arrivals records both for April and for the first four months of the year.
- Record monthly and year-to-date arrivals from China (+19.6% in April, +23.9% YTD), India (+11.2% in April, +21.3% YTD), and Australia (+2.2% in April, +5.6% YTD) contributed to this positive performance in April and over the first four months of 2018. With 47,000 visitors in April and 178,000 YTD, China led this region in arrivals to Canada and maintained its new position as Destination Canada's largest long-haul market so far this year.
- Arrivals from Japan declined in April (-3.1%) for the fourth consecutive month in 2018, bringing year-to-date arrivals down -11.3% compared to the same period in 2017. South Korea also saw a downturn in April arrivals (-7.8%); however, with 18,000 visitors it was still the second biggest April following the record peak in 2017. Year-to-date arrivals from South Korea were ahead of last year (+4.4%), setting a new YTD record.
- The biggest increase in arrivals from Destination Canada's Asia-Pacific markets was from direct air arrivals (+10.5% in April, +15.0% YTD). This was supported by more direct air capacity to Canada from these markets, which generally increased or was on par with a year ago, with particularly notable expansion in April from India (+20.7%) and China (+12.5%).
- Visitors from most of Destination Canada's Asia-Pacific markets saw a decline or very little change in their currencies' purchasing power in Canada compared to a year ago, with the exception of China (+3.6% in both April and YTD).

DC Asia-Pacific Arrivals by Port of Entry

- Year-to-date April 2018, 70.8% of arrivals from Destination Canada's Asia-Pacific region were direct air arrivals, with almost half (48.9%) landing at YVR. However, YUL continued to record a sharp increase in Chinese arrivals (+271.6%).

			Australia	China	India	Japan	South Korea
Air Arrivals from Overseas	YYZ	Arrivals	3,846	54,521	39,066	12,409	15,481
		YOY%	-3.7%	25.4%	63.2%	-41.8%	10.1%
		% of Total	**5.1%**	**30.6%**	**62.6%**	**18.5%**	**24.9%**
	YVR	Arrivals	30,534	62,194	8,278	34,182	19,133
		YOY%	14.2%	1.2%	-4.0%	10.0%	-5.7%
		% of Total	**40.8%**	**34.9%**	**13.3%**	**50.8%**	**30.8%**
	YUL	Arrivals	401	24,211	2,082	170	315
		YOY%	-28.0%	271.6%	2.2%	-54.5%	17.1%
		% of Total	**0.5%**	**13.6%**	**3.3%**	**0.3%**	**0.5%**
	YYC	Arrivals	389	2,470	2,528	2,001	81
		YOY%	2.6%	-14.7%	24.8%	-26.3%	-49.7%
		% of Total	**0.5%**	**1.4%**	**4.1%**	**3.0%**	**0.1%**
	All other airports	Arrivals	133	201	610	65	84
		YOY%	0.4%	0.2%	1.7%	0.1%	0.2%
		% of Total	**0.2%**	**0.1%**	**1.0%**	**0.1%**	**0.1%**
	Subtotal	Arrivals	35,303	143,597	52,564	48,827	35,094
		YOY%	10.9%	25.3%	40.8%	-12.1%	0.8%
		% of Total	**47.1%**	**80.5%**	**84.3%**	**72.6%**	**56.4%**
Air Arrivals via the US	All airports	Arrivals	32,991	19,045	6,008	13,400	8,755
		YOY%	7.1%	-5.4%	23.8%	-18.6%	4.9%
		% of Total	**44.0%**	**10.7%**	**9.6%**	**19.9%**	**14.1%**
Sea Arrivals	All sea borders	Arrivals	391	93	98	62	7
		YOY%	-39.1%	45.3%	58.1%	106.7%	-63.2%
		% of Total	**0.5%**	**0.1%**	**0.2%**	**0.1%**	**0.0%**
Land Arrivals via US	All land borders	Arrivals	6,242	15,666	3,717	4,945	18,357
		YOY%	-17.6%	71.8%	-59.1%	33.1%	12.2%
		% of Total	**8.3%**	**8.8%**	**6.0%**	**7.4%**	**29.5%**
Total Overnight Arrivals			**74,927**	**178,401**	**62,387**	**67,234**	**62,213**

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

	April 2018	YOY % Variance	Jan.- Apr. 2018	YOY % Variance
United States	1,931,290	4.5	6,820,361	5.7
Other Countries	1,305,013	9.1	5,375,736	4.7
Total Trips from Canada	3,236,303	6.3	12,196,097	5.2

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

- Overnight trips by Canadians to international destinations expanded by 6.3% in April 2018 to reach 3.2 million. The number of overnight trips to the US (1.9 million) grew by 4.5% (+4.4 by auto, +5.1% by air, -1.5% other modes), while overnight trips to overseas destinations (1.3 million) gained 9.1% year-over-year.
- Over the first four months of 2018, overnight international trips by Canadians gained 5.2% to reach 12.2 million, with trips to the US (6.8 million) up 5.7% (+6.6% auto, +5.0% air and +3.1% other modes), ahead of outbound trips to overseas destinations (5.4 million, +4.7%).

INTERNATIONAL ARRIVALS BY PROVINCE OF ENTRY

Overnight Arrivals by Province of Entry

		Newfoundland and Labrador	Prince Edwad Island	Nova Scotia	New Brunswick	Québec	Ontario
Total One or more nights	2018	7,052	15	17,641	25,342	749,368	1,949,291
	Variance YOY%	1.7%	-65.9%	25.7%	-4.8%	14.1%	-0.4%
	Change YOY	116	(29)	3,612	(1,287)	92,692	(8,781)
US Residents by Automobile	2018	0	0	0	23,899	239,531	729,504
	Variance YOY%	0.0%	0.0%	0.0%	-2.2%	-2.1%	-2.8%
	Change YOY	-	-	-	(548)	(5,052)	(20,687)
US Residents by Non-Automobile	2018	1,203	4	8,035	1,133	232,271	609,303
	Variance YOY%	9.0%	-85.2%	1.4%	-29.1%	20.9%	2.2%
	Change YOY	99	(23)	112	(466)	40,086	13,207
Residents from Other Countries	2018	5,849	11	9,606	310	277,566	610,484
	Variance YOY%	0.3%	-35.3%	57.3%	-46.8%	26.2%	-0.2%
	Change YOY	17	(6)	3,500	(273)	57,658	(1,301)

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

Overnight Arrivals by Province of Entry

		Manitoba	Saskatchewan	Alberta	British Columbia	Yukon	Nunavut	CANADA
Total One or more nights	2018	45,834	10,781	214,257	1,279,170	8,887	143	**4,307,781**
	Variance YOY%	3.7%	1.9%	4.7%	5.0%	12.4%	-41.6%	**3.9%**
	Change YOY	1,623	199	9,709	60,973	977	(102)	**159,702**
US Residents by Automobile	2018	30,247	8,350	17,219	484,265	8,380	0	**1,541,395**
	Variance YOY%	3.6%	1.5%	-1.4%	1.6%	17.5%	0.0%	**-1.0%**
	Change YOY	1,063	125	(245)	7,784	1,249	-	**(16,311)**
US Residents by Non-Automobile	2018	13,845	1,804	129,031	354,615	146	22	**1,351,412**
	Variance YOY%	1.9%	-0.3%	9.4%	17.9%	-54.7%	120.0%	**9.6%**
	Change YOY	254	(6)	11,128	53,831	(176)	12	**118,058**
Residents from Other Countries	2018	1,742	627	68,007	440,290	361	121	**1,414,974**
	Variance YOY%	21.3%	14.6%	-1.7%	-0.1%	-21.0%	-48.5%	**4.3%**
	Change YOY	306	80	(1,174)	(642)	(96)	(114)	**57,955**

- From January to April 2018, most international visitors to Canada continued to cross the border in Ontario (45.3%), British Columbia (29.7%), and Quebec (17.4%). Year-over-year the largest total growth was recorded in Quebec (+93,000 visitors) and British Columbia (+61,000 visitors).
- The downward trend in US auto arrivals was mostly observed in Ontario and Quebec, followed by New Brunswick and Alberta.
- British Columbia and Quebec saw the largest growth in US non-auto arrivals, while the biggest growth in international arrivals from other countries was recorded in Quebec and Nova Scotia.

ACCOMMODATION

Hotel Performance Indicators by Province

	Occupancy Rates				Average Daily Rate (ADR)				Revenue Per Available Room (RevPAR)			
	Apr. 2018	YOY^ Variance	Jan.- Apr.	YOY^ Variance	Apr. 2018	YOY % Variance	Jan.- Apr.	YOY % Variance	Apr. 2018	YOY % Variance	Jan.- Apr.	YOY % Variance
Alberta[1]	55.1%	4.0	51.0%	2.5	$128.69	-0.3%	$127.19	-0.7%	$70.90	7.4%	$64.86	4.3%
British Columbia	66.6%	-0.7	63.5%	1.1	$158.28	6.9%	$164.76	9.1%	$105.38	5.7%	$104.68	11.0%
Saskatchewan	58.8%	7.7	53.0%	4.2	$119.15	-1.7%	$118.00	-2.6%	$70.03	13.2%	$62.55	5.8%
Manitoba	65.4%	1.3	63.2%	0.0	$126.61	2.9%	$123.73	2.3%	$82.86	4.9%	$78.24	2.2%
Ontario	67.6%	1.3	62.0%	2.0	$152.85	5.9%	$148.63	5.6%	$103.40	8.0%	$92.15	9.2%
Quebec	60.4%	-2.3	59.6%	-1.4	$150.34	2.4%	$152.58	2.8%	$90.80	-1.3%	$90.97	0.4%
New Brunswick	54.3%	1.7	48.8%	0.5	$118.51	4.1%	$116.75	4.0%	$64.39	7.4%	$57.02	5.0%
Nova Scotia	64.0%	2.1	54.8%	0.6	$140.82	10.4%	$130.41	6.3%	$90.13	14.2%	$71.45	7.5%
Newfoundland	46.1%	-11.4	41.4%	-10.7	$131.34	0.0%	$131.51	-0.5%	$60.50	-19.8%	$54.48	-20.9%
Prince Edward Island	47.7%	3.9	40.0%	-0.4	$114.87	8.0%	$112.41	7.2%	$54.80	17.5%	$44.91	6.2%
Northwest Territories	57.7%	2.3	77.3%	4.6	$143.97	1.1%	$152.41	3.7%	$83.12	5.4%	$117.87	10.2%
Yukon	49.7%	-3.0	52.2%	-1.4	$131.66	13.1%	$125.21	8.1%	$65.40	6.6%	$65.31	5.3%
Canada	**62.7%**	**1.1**	**58.6%**	**1.3**	**$146.70**	**4.1%**	**$146.48**	**4.5%**	**$92.00**	**5.9%**	**$85.79**	**6.9%**

Note: Based on the operating results of 237,545 rooms (unweighted data).
^ Percentage points.
[1] Excluding Alberta resorts.

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- The National Occupancy Rate inched up 1.1 points year-over-year to reach 62.7% in April 2018. Year-to-date, the rate sat at 58.6%, up 1.3 points over the first four months of 2017. In April the highest occupancy rates were reported in Ontario (67.6%), British Columbia (66.6%) and Manitoba (65.4%), while YTD Northwest Territories (77.3%), British Columbia (63.5%) and Manitoba (63.2%) were the highest. The strongest year-over-year growth in occupancy was reported in Saskatchewan in April and in Northwest Territories YTD.

- At the national level, the average daily rate (ADR) continued to record strong year-over-year growth, sitting at $146.70 in April (+4.1%) and $146.48 YTD (+4.5%). The highest ADR was reported in British Columbia, both in April ($158.28) and YTD ($164.76). British Columbia also reported the fasted growth in this measure YTD, while in April it was Yukon.

- Canada's average revenue per available room (RevPar) also continued to increase rapidly over the same period in 2017, sitting at $92.00 (+5.9%) in April and $85.79 (+6.9%) YTD. At the provincial level, British Columbia took the top spot in April ($105.38), while Northwest Territories continued to lead YTD ($117.87).

ACCOMMODATION

Hotel Performance Indicators by Property Type

	Occupancy Rates				Average Daily Rate (ADR)			
	Apr. 2018	YOY^ Change	Jan.- Apr.	YOY^ Variance	Apr. 2018	YOY Variance	Jan.- Apr.	YOY Variance
Property Size								
Under 50 rooms	45.9%	1.0	43.3%	0.7	$105.13	3.0%	$106.59	3.6%
50-75 rooms	54.2%	0.6	51.5%	1.7	$109.91	2.8%	$109.92	3.3%
76-125 rooms	61.1%	2.2	57.1%	1.8	$124.60	2.1%	$124.26	2.5%
126-200 rooms	64.5%	0.6	59.3%	0.8	$137.39	4.6%	$135.19	4.4%
201-500 rooms	67.2%	1.4	62.6%	1.4	$172.88	5.1%	$174.51	6.1%
Over 500 rooms	69.3%	-1.2	66.0%	0.1	$212.14	6.9%	$209.31	6.2%
Total	**62.7%**	**1.1**	**58.6%**	**1.3**	**$146.70**	**4.1%**	**$146.48**	**4.5%**
Property Type								
Limited Service	57.3%	1.8	53.7%	1.8	$114.91	3.3%	$113.77	3.0%
Full Service	66.6%	1.1	61.0%	1.4	$161.51	5.5%	$156.00	5.2%
Suite Hotel	72.2%	-0.9	67.4%	-0.2	$152.51	4.0%	$153.89	5.6%
Resort	51.2%	0.0	57.4%	-0.3	$191.61	0.7%	$237.36	7.9%
Total	**62.7%**	**1.1**	**58.6%**	**1.3**	**$146.70**	**4.1%**	**$146.48**	**4.5%**
Price Level								
Budget	56.4%	1.0	51.8%	1.5	$99.70	5.7%	$98.85	6.7%
Mid-Price	63.6%	1.0	59.3%	1.3	$139.83	3.2%	$137.34	3.0%
Upscale	66.9%	1.1	64.1%	0.7	$229.05	4.2%	$235.93	6.4%
Total	**62.7%**	**1.1**	**58.6%**	**1.3**	**$146.70**	**4.1%**	**$146.48**	**4.5%**

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

- Both in April 2018 and over the first four months of the year, the highest occupancy rates were reported for larger properties (500+ rooms) (69.3% in April, 66.0% YTD), suite hotels (72.2% in April, 67.4% YTD), and upscale properties (66.9% in April, 64.1% YTD).
- Similarly, larger properties ($212.14 in April, $209.31 YTD) and upscale properties ($229.05 in April, $235.93 YTD) reported the highest average daily rates (ADR) over this period, but resorts reported the highest ADR by property type ($191.61 in April, $237.36 YTD).

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