

# TOURISM HIGHLIGHTS

July 2019



## KEY MESSAGES

- In July 2019, Canada welcomed an estimated record 3.40 million overnight visitors (+5.8% compared to July 2018). This included 2.96 million from US visitors by automobile and by air and long-haul visitors entering Canada by air or sea (non-land arrivals). Gains in US automobile and air arrivals (+7.2%) more than offset a slight contraction in overseas non-land visitors (-0.3%).
- Year-to-date, Canada welcomed an estimated record 12.43 million overnight visitors (+4.6% year-over-year), including 11.12 million from US auto and air arrivals and long-haul air and sea arrivals (+5.1%). Both US auto/air arrivals (+6.8%) and long-haul non-land arrivals (1.5%) contributed to this positive trend year-to-date.

## HIGHLIGHTS

- **Independence Day timing lifts the US:** A spike in US auto overnight arrivals coincided with the Independence Day statutory holiday falling on a Thursday, which many US visitors converted into a long weekend getaway over the first weekend of July. This contributed to a +4.9% lift in US automobile arrivals, bringing year-to-date US auto arrivals up to +3.3%. US air arrivals expanded at a double-digit pace (+12.3%) for a fourth consecutive month, bringing year-to-date US air arrivals to +13.0% year-over-year.
- **Continued slowdown from China:** In the midst of a slowing economy, air and sea overnight arrivals from China continued to slow in July 2019 (-10.6%) for a sixth consecutive month, as air arrivals both direct from overseas (-10.1%) and via the US (-19.5%) contracted at a double-digit pace. Year-to-date, non-land overnight arrivals from China were down -6.7% compared to the same period last year.
- **Slower growth in other Asia-Pacific markets:** In July 2019, gains in non-land overnight arrivals from Australia (+1.6%) and South Korea (+1.2%) nearly offset slight declines from India (-1.3%) and Japan (-2.5%), bringing the total overnight non-land arrivals from these four Asia-Pacific markets almost on par with July 2018 (-0.1%). Year-to-date (+2.3%), these four markets stood on gains from India (+9.7%), Australia (+1.1%) and South Korea (+0.4%) which together compensated for a contraction from Japan (-4.5%).
- **Rises from Germany:** Air and sea overnight arrivals from Germany increased year-over-year for a fourth consecutive month in July 2019 (+10.0%), pulling this market back into positive territory year-to-date (+1.6%). A significant share of this increase was related to a spike in cruise arrivals to Newfoundland in July 2019.

## DATA RELEASE NOTICE

This analysis focuses on US arrivals by land and by air, and on long-haul arrivals by air and cruise only.

Long-haul tourist arrivals by land were the subject of significant changes with respect to data collection and the identification of country of residence starting in August 2018. As a result of these changes, monthly arrivals by land are not comparable to data collected before August 2018. Year-over-year arrival performance results should only be evaluated for non-land long haul arrivals. This does not apply to US auto arrivals.

**Table 1: Arrivals of international overnight visitors to Canada – July 2019**

| Markets        | Total Overnight/Tourist Arrivals |                       |                       |               |                       |               |                       |               |                       |               |                 |                        |
|----------------|----------------------------------|-----------------------|-----------------------|---------------|-----------------------|---------------|-----------------------|---------------|-----------------------|---------------|-----------------|------------------------|
|                | All Modes*                       |                       | Non-Land Arrivals     |               |                       |               |                       |               |                       |               | Land Overnight* |                        |
|                | Arrivals                         | Year-over-year change | Total                 |               | Air Direct            |               | Air Via US            |               | Water (Cruise)        |               | Arrivals        | Year-over-year change* |
| Arrivals       |                                  |                       | Year-over-year change | Arrivals      | Year-over-year change | Arrivals      | Year-over-year change | Arrivals      | Year-over-year change |               |                 |                        |
| United States  | <b>2,350,033</b>                 | <b>4.9%</b>           |                       |               |                       |               |                       |               |                       |               |                 |                        |
| Auto           | 1,419,140                        | 4.9%                  |                       |               |                       |               |                       |               |                       |               |                 |                        |
| Air            | 674,130                          | 12.3%                 |                       |               |                       |               |                       |               |                       |               |                 |                        |
| Auto & Air     | <b>1,093,270</b>                 | <b>7.2%</b>           |                       |               |                       |               |                       |               |                       |               |                 |                        |
| Other          | <b>256,763</b>                   | <b>-10.7%</b>         |                       |               |                       |               |                       |               |                       |               |                 |                        |
| DC Long-Haul   | <b>623,469</b>                   | <b>7.9%</b>           | <b>515,227</b>        | <b>0.8%</b>   | 414,591               | <b>-0.2%</b>  | 69,385                | <b>-2.7%</b>  | 31,251                | 28.9%         | 108,242         | 62.2%                  |
| United Kingdom | 135,245                          | 19.3%                 | <b>109,556</b>        | <b>3.0%</b>   | 91,700                | 2.4%          | 10,423                | <b>-4.8%</b>  | 7,433                 | 26.0%         | 25,689          | 266.4%                 |
| France         | 104,516                          | 10.8%                 | <b>90,626</b>         | <b>6.1%</b>   | 81,488                | 8.6%          | 8,710                 | <b>-14.0%</b> | 428                   | 46.6%         | 13,890          | 57.0%                  |
| China          | 99,114                           | <b>-1.8%</b>          | <b>79,364</b>         | <b>-10.6%</b> | 69,693                | <b>-10.1%</b> | 7,174                 | <b>-19.5%</b> | 2,497                 | 9.0%          | 19,750          | 62.5%                  |
| Mexico         | 70,892                           | 15.4%                 | <b>57,818</b>         | <b>0.1%</b>   | 42,362                | <b>-5.1%</b>  | 10,971                | 19.8%         | 4,485                 | 13.3%         | 13,074          | 254.0%                 |
| Germany        | 70,717                           | 12.2%                 | <b>58,724</b>         | <b>10.0%</b>  | 49,083                | 4.9%          | 4,944                 | <b>-5.0%</b>  | 4,697                 | 235.5%        | 11,993          | 24.4%                  |
| Australia      | 44,210                           | 6.2%                  | <b>37,843</b>         | <b>1.6%</b>   | 17,192                | <b>-5.0%</b>  | 13,916                | 2.4%          | 6,735                 | 20.8%         | 6,367           | 45.3%                  |
| India          | 35,772                           | 9.0%                  | <b>29,852</b>         | <b>-1.3%</b>  | 23,393                | 2.0%          | 4,559                 | <b>-11.8%</b> | 1,900                 | <b>-10.8%</b> | 5,920           | 130.3%                 |
| South Korea    | 33,940                           | <b>-18.7%</b>         | <b>26,179</b>         | <b>1.2%</b>   | 20,613                | <b>-0.7%</b>  | 4,278                 | 11.4%         | 1,288                 | <b>-0.8%</b>  | 7,761           | <b>-51.1%</b>          |
| Japan          | 29,063                           | 2.0%                  | <b>25,265</b>         | <b>-2.5%</b>  | 19,067                | <b>-5.4%</b>  | 4,410                 | 1.0%          | 1,788                 | 27.7%         | 3,798           | 47.4%                  |
| Total Non-US   | <b>1,045,440</b>                 | <b>7.8%</b>           | <b>865,342</b>        | <b>-0.3%</b>  | 695,644               | 0.0%          | 126,132               | <b>-7.4%</b>  | 43,566                | 21.8%         | 180,098         | 76.8%                  |
| Total          | <b>3,395,473</b>                 | <b>5.8%</b>           |                       |               |                       |               |                       |               |                       |               |                 |                        |

Source: Statistics Canada, Frontier Counts Custom Tabulations  
 \*See Data Release Notice on Page 1

**Table 2: Arrivals of international visitors to Canada – January to July 2019**

| YTD July 2019  | Total Overnight/Tourist Arrivals |                       |                   |                       |            |                       |            |                       |                |                       |                 |                        |
|----------------|----------------------------------|-----------------------|-------------------|-----------------------|------------|-----------------------|------------|-----------------------|----------------|-----------------------|-----------------|------------------------|
|                | All Modes*                       |                       | Non-Land Arrivals |                       |            |                       |            |                       |                |                       | Land Overnight* |                        |
|                |                                  |                       | Total             |                       | Air Direct |                       | Air Via US |                       | Water (Cruise) |                       |                 |                        |
| Markets        | Arrivals                         | Year-over-year change | Arrivals          | Year-over-year change | Arrivals   | Year-over-year change | Arrivals   | Year-over-year change | Arrivals       | Year-over-year change | Arrivals        | Year-over-year change* |
| United States  | <b>8,439,265</b>                 | <b>3.4%</b>           |                   |                       |            |                       |            |                       |                |                       |                 |                        |
| Auto           | 4,750,932                        | 3.3%                  |                   |                       |            |                       |            |                       |                |                       |                 |                        |
| Air            | 2,926,701                        | 13.0%                 |                   |                       |            |                       |            |                       |                |                       |                 |                        |
| Auto & Air     | <b>7,677,633</b>                 | <b>6.8%</b>           |                   |                       |            |                       |            |                       |                |                       |                 |                        |
| Other          | <b>761,632</b>                   | <b>-21.6%</b>         |                   |                       |            |                       |            |                       |                |                       |                 |                        |
| DC Long-Haul   | <b>2,390,612</b>                 | <b>6.5%</b>           | <b>2,054,905</b>  | <b>1.9%</b>           | 1,648,278  | 3.2%                  | 317,804    | <b>-5.9%</b>          | 88,823         | 10.0%                 | 335,707         | 47.0%                  |
| United Kingdom | 476,193                          | 11.2%                 | <b>402,195</b>    | <b>-0.5%</b>          | 331,511    | <b>-0.8%</b>          | 46,244     | <b>-6.5%</b>          | 24,440         | 18.9%                 | 73,998          | 204.2%                 |
| China          | 402,205                          | <b>-1.1%</b>          | <b>336,317</b>    | <b>-6.7%</b>          | 293,092    | <b>-5.5%</b>          | 36,132     | <b>-18.4%</b>         | 7,093          | 16.4%                 | 65,888          | 41.7%                  |
| France         | 346,577                          | 10.8%                 | <b>310,667</b>    | <b>6.8%</b>           | 272,209    | 15.3%                 | 37,543     | <b>-30.8%</b>         | 915            | 23.0%                 | 35,910          | 65.2%                  |
| Mexico         | 292,690                          | 26.4%                 | <b>249,447</b>    | <b>13.5%</b>          | 195,838    | 10.3%                 | 45,074     | 32.0%                 | 8,535          | 6.2%                  | 43,243          | 266.8%                 |
| Germany        | 218,604                          | 2.2%                  | <b>190,113</b>    | <b>1.6%</b>           | 158,509    | 2.6%                  | 22,913     | <b>-8.0%</b>          | 8,691          | 11.7%                 | 28,491          | 6.4%                   |
| India          | 205,477                          | 16.9%                 | <b>179,866</b>    | <b>9.7%</b>           | 149,799    | 11.4%                 | 22,796     | 1.2%                  | 7,271          | 3.0%                  | 25,611          | 118.5%                 |
| Australia      | 199,979                          | 3.4%                  | <b>176,980</b>    | <b>1.1%</b>           | 86,527     | 4.1%                  | 66,287     | <b>-2.9%</b>          | 24,166         | 2.3%                  | 22,999          | 25.2%                  |
| Japan          | 127,105                          | <b>-1.9%</b>          | <b>112,484</b>    | <b>-4.5%</b>          | 85,301     | <b>-5.9%</b>          | 23,225     | <b>-2.2%</b>          | 3,958          | 16.2%                 | 14,621          | 25.0%                  |
| South Korea    | 121,782                          | <b>-19.9%</b>         | <b>96,836</b>     | <b>0.4%</b>           | 75,492     | <b>-1.7%</b>          | 17,590     | 8.1%                  | 3,754          | 9.2%                  | 24,946          | <b>-55.1%</b>          |
| Total Non-US   | <b>3,992,903</b>                 | <b>7.1%</b>           | <b>3,443,696</b>  | <b>1.5%</b>           | 2,740,923  | 3.1%                  | 575,140    | <b>-7.1%</b>          | 127,633        | 10.2%                 | 549,207         | 64.2%                  |
| Total          | <b>12,432,168</b>                | <b>4.6%</b>           |                   |                       |            |                       |            |                       |                |                       |                 |                        |

Source: Statistics Canada, Frontier Counts Custom Tabulations

\*See Data Release Notice on Page 1