

# Tourism Snapshot

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

January 2016  
Volume 12, Issue 1



# KEY HIGHLIGHTS

- The year 2016 started on a positive note for Canada, with 786,530 total international arrivals in January 2016, up 10.3% over January 2015.
- Arrivals from DC's 11 markets (10 overseas markets + the US) registered a 9.8% increase in January 2016 amid gains from all four world regions, including the US (+10.2%), Asia-Pacific (+13.9%), Latin America (+1.6%) and Europe (+4.2%). All DC markets except Brazil recorded arrival growth during January 2016.
- January 2016 recorded a strong increase in visitations from the United States with 10.2% growth relative to January 2015. It was the third consecutive months of double-digit arrival growth from south of the border.
- In addition to the US, China (+27.2%), Mexico (+22%) and South Korea (+17.5%) recorded double digit growth in January 2016.

## QUICK LINKS

## Industry Performance Dashboard

		Current Month
<b>✈ Overnight Arrivals<sup>1</sup></b>		
Total International		↑ 10.3%
11 DC Markets**		↑ 9.8%
Non-DC Markets		↑ 14.1%
<b>✈ Air Seat Capacity<sup>2</sup></b>		
Total International		↑ 4.3%
11 DC Markets**		↑ 3.9%
Non-DC Markets		↑ 4.5%
<b>🏠 National Hotel Indicators<sup>3</sup></b>		
Occupancy Rate*		↓ -1.4
Revenue Per Available Room (Revpar)		↑ 1.4%
Average Daily Rate (ADR)		↓ -1.6%

Notes:

The Industry Performance Dashboard figures are year-on-year (2016/2015) variations.

\* Percentage point variations.

\*\* The 11 DC markets are US, France, Germany, UK, Australia, China, India, Japan, South Korea, Brazil and Mexico.

Sources:

1. International Travel Survey, Statistics Canada.

2. Diiio Mi.

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>
		Current Month	Current Month	Current Month	Current Month Average
United States	United States	526,018	10.2%	2.7%	17.5%
DC Europe	France	22,122	6.2%	2.8%	10.0%
	Germany	11,574	7.7%	1.3%	10.0%
	United Kingdom	26,326	1.1%	-3.1%	12.0%
DC Asia-Pacific	Australia	20,642	5.7%	-4.8%	2.0%
	China	30,567	27.2%	18.5%	11.4%
	India	8,373	6.8%	56.8%	8.7%
	Japan	10,581	0.2%	6.9%	18.0%
	South Korea	12,197	17.5%	22.8%	6.4%
DC Latin America	Brazil	8,281	-18.8%	20.0%	-23.4%
	Mexico	12,511	22.0%	56.4%	-3.9%
<b>Total 11 DC Markets</b>		<b>689,192</b>	<b>9.8%</b>		
<b>Rest of the World</b>		<b>97,341</b>	<b>14.1%</b>		
<b>Total International</b>		<b>786,533</b>	<b>10.3%</b>		

Sources:

- i. International Travel Surey, Statistics Canada.
- ii. Diiio Mi.
- 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 in the current month and year-to-date relative to the same periods in 2015.
- iii. The exchange rate variation is calculated on the average value of the Canadian dollar during the current month and the year-to-date compared to the same periods in 2015.



# UNITED STATES

**US Arrivals to Canada**

CURRENT MONTH:

**+10.2% ↑ YOY**



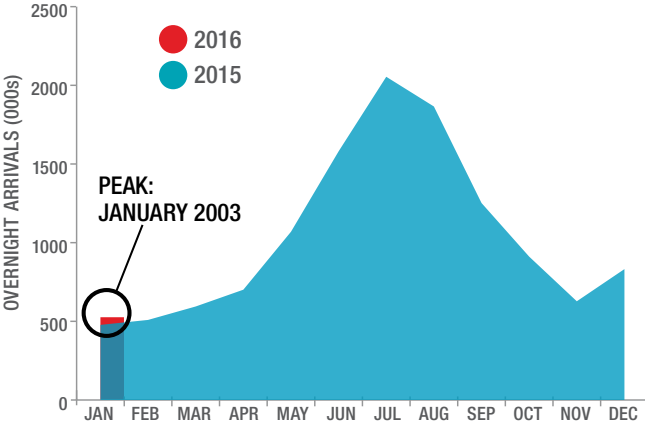
## Overnight Arrivals

	Jan. 2016	
	Arrivals	% Change YOY
Automobile	302,306	10.9
Air	193,437	11.5
Other	30,275	-3.2
<b>US Total</b>	<b>526,018</b>	<b>10.2</b>

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



## Trend Plot: Total United States Arrivals



## United States: Key Indicators

<b>Air Seat Capacity<sup>i</sup></b>	Current Month	2.7%
<b>Exchange Rate<sup>ii</sup></b>	Current Month	17.5%
<b>Consumer Confidence Index (1985=100)<sup>iii</sup></b>	Current Month	96.3
	Previous Month	90.4
<b>Arrival Peak<sup>iv</sup></b>	Year	2003
	Current % of Previous Peak	85.5%

Source:  
 i. Dilo Mi. Year on year % change.  
 ii. Bank of Canada. Year on year % change.  
 iii. Consumer Confidence Index, the Conference Board (USA).  
 iv. Statistics Canada, International Travel Survey.

## UNITED STATES

- Canada welcomed about 526,000 overnight visitors from the US in January 2016. The US visitor peak on record during the month of January occurred in 2003, with 615,000 overnight trips.
- In January 2016, overall arrivals from the US rose 10.2% over January 2015, with growth recorded in arrivals by auto (+10.9%) and by air (+11.5%) while arrivals by other modes of transport recorded a minor decline (-3.2%). It was the third consecutive months of double-digit overnight arrival growth from the US.
- Overnight inbound arrivals from the US were helped by the strong appreciation of the US dollar relative to the Canadian dollar (+17.5% relative to January 2015) as well as by significant improvements in the US economy amid solid job creation and GDP growth numbers. A minor increase in air seat capacity (+2.7%) relative to January 2015 also facilitated the growth of US arrivals to Canada in January 2016.
- The consumer confidence index was better than expected in January at 98.1, up from 96.3 in December 2015, indicating an improvement of overall confidence in the strength of the US economy.

# EUROPE

## Europe Arrivals to Canada

CURRENT MONTH:

**+4.2%** ↑ YOY



### Overnight Arrivals

	Jan. 2016	
	Arrivals	% Change YOY
<b>DC Europe</b>	<b>60,022</b>	<b>4.2</b>
United Kingdom	26,326	1.1
France	22,122	6.2
Germany	11,574	7.7
<b>Secondary Markets</b>		
Italy	5,331	8.5
Netherlands	3,990	23.3
Spain	2,636	28.8
Switzerland	4,780	14.3
<b>Rest of Europe</b>	<b>28,885</b>	<b>16.2</b>
<b>Total Europe</b>	<b>105,644</b>	<b>9.1</b>



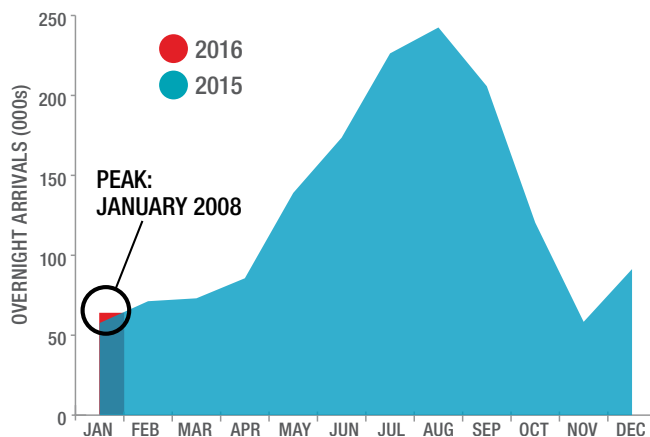
Source: Statistics Canada, International Travel Survey.  
Note: The figures are preliminary estimates and are subject to change.

### DC Europe: Key Indicators

		France	Germany	United Kingdom
<b>Air Seat Capacity<sup>i</sup></b>	Current Month	2.8%	1.3%	-3.1%
<b>Exchange Rate<sup>ii</sup></b>	Current Month	10.0%	10.0%	12.0%
<b>Arrival Peak<sup>iii</sup></b>	Year	2011	2009	2008
	Current % of Previous Peak	103.3%	88.9%	67.3%

Sources:  
i. Dilio Mi. Year on year % change.  
ii. Bank of Canada. Year on year % change.  
iii. Statistics Canada, International Travel Survey.

### Trend Plot: Total DC Europe Arrivals



- Canada welcomed 60,000 visitors from DC's markets in Europe in January 2016, up 4.2% compared to January 2015. The arrival peak on record for a month of January was achieved in 2008 with 69,000 visitors from DC's three European markets.
- In January 2016, Germany recorded the strongest growth of the three DC markets with arrivals up 7.7%. The more favorable exchange rate for German visitors – the Euro gained 10% relative to the CAD from January 2015 to January 2016 – and improvements in the German economy helped energize visitation to Canada.
- France recorded a new arrival record for a month of January in 2016 at 22,120 overnight visits, up 6.2% relative to January 2015. A 2.8% increase in air capacity in January, along with a more favorable exchange rate – the Euro gained 10% relative to the CAD from January 2015 to January 2016 – helped drive visitation to Canada from the Hexagon.
- The UK registered a minor increase in arrivals (+1.1%) amid a decline in air seat capacity (-3.5%) but despite the strong appreciation of the British pound (+12%) relative to January 2015.

## DC Europe Arrivals by Port of Entry

- In January 2016, about two thirds of arrivals from DC markets in Europe were direct air arrivals from overseas. Air arrivals via the US accounted for about 29% of total arrivals from France, 26% from Germany and 18% from the UK. Land arrivals via the US made up about 6% of French arrivals, 5% of German arrivals and 10.5% of UK arrivals.
- Notable year-on-year variations include the 89% increase in arrivals from France at YVR airport thanks to the new Air France flight from Paris and the strong increases in the number of UK (+18.5%) and German (+15.7%) arrivals at Montreal-Trudeau. Calgary airport also registered a strong increase in arrivals from Germany (+23.3%) relative to January 2015.

		France	Germany	UK	
Air Arrivals from Overseas	YYZ	Arrivals	2,180	3,258	7,766
		YOY%	-8.2%	2.0%	9.3%
		<b>% of Total</b>	<b>9.9%</b>	<b>28.1%</b>	<b>29.5%</b>
	YVR	Arrivals	699	1,990	4,720
		YOY%	88.9%	8.3%	-9.9%
		<b>% of Total</b>	<b>3.2%</b>	<b>17.2%</b>	<b>17.9%</b>
	YUL	Arrivals	10,923	1,388	2,320
		YOY%	5.7%	15.7%	18.5%
		<b>% of Total</b>	<b>49.4%</b>	<b>12.0%</b>	<b>8.8%</b>
	YYC	Arrivals	207	1,121	2,856
		YOY%	-17.2%	23.3%	0.4%
		<b>% of Total</b>	<b>0.9%</b>	<b>9.7%</b>	<b>10.8%</b>
	All other airports	Arrivals	239	241	1,034
		YOY%	1.8%	3.4%	5.9%
		<b>% of Total</b>	<b>1.1%</b>	<b>2.1%</b>	<b>3.9%</b>
Subtotal	Arrivals	14,248	7,998	18,696	
	YOY%	5.2%	9.1%	3.2%	
	<b>% of Total</b>	<b>64.4%</b>	<b>69.1%</b>	<b>71.0%</b>	
Air Arrivals via the US	All airports	Arrivals	6,496	2,976	4,856
		YOY%	14.5%	2.3%	-7.3%
		<b>% of Total</b>	<b>29.4%</b>	<b>25.7%</b>	<b>18.4%</b>
Sea Arrivals	All sea borders	Arrivals	10	0	0
		YOY%	100.0%	0.0%	-100.0%
		<b>% of Total</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.0%</b>
Land Arrivals via US	All land borders	Arrivals	1,368	600	2,774
		YOY%	-15.5%	17.9%	3.2%
		<b>% of Total</b>	<b>6.2%</b>	<b>5.2%</b>	<b>10.5%</b>
<b>Total Overnight Arrivals</b>		<b>22,122</b>	<b>11,574</b>	<b>26,326</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:

**+13.9%** ↑ YOY



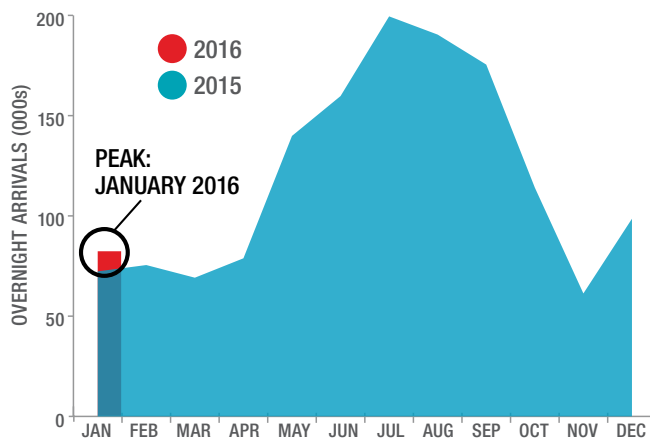
### Overnight Arrivals

	Jan. 2016	
	Arrivals	% Change YOY
<b>DC Asia-Pacific</b>	<b>82,360</b>	<b>13.9</b>
Australia	20,642	5.7
China	30,567	27.2
India	8,373	6.8
Japan	10,581	0.2
South Korea	12,197	17.5
<b>Secondary Markets</b>		
Hong Kong	7,146	17.7
Taiwan	3,635	43.9
<b>Rest of Asia-Pacific</b>	<b>19,718</b>	<b>9.5</b>
<b>Total Asia-Pacific</b>	<b>112,859</b>	<b>14.1</b>



Source: Statistics Canada, International Travel Survey.  
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
<b>Air Seat Capacity<sup>i</sup></b>	Current Month	-4.8%	18.5%	56.8%	6.9%	22.8%
<b>Exchange Rate<sup>ii</sup></b>	Current Month	2.0%	11.4%	8.7%	18.0%	6.4%
<b>Arrival Peak<sup>iii</sup></b>	Year	2015	2014	2015	1997	2007
	Current % of Previous Peak	105.7%	114.2%	106.8%	42.6%	86.6%

Sources:  
i. Dilo Mi. Year on year % change.  
ii. Bank of Canada. Year on year % change.  
iii. Statistics Canada, International Travel Survey.

- Canada welcomed 82,360 visitors from DC Asia-Pacific markets in January 2016, up 13.9% compared to 2015, achieving a new all-time record for a month of January.
- China recorded the strongest growth with arrivals up 27.2% in January 2016. An 18.5% increase in air seat capacity along with a more favorable exchange rate – the Chinese yuan gained 11.4% year-on-year relative to the CAD in January 2016 – helped attract more Chinese visitors to Canada. Arrivals from China also recorded a new peak for a month of January at 30,570 visits.
- South Korea continued to post sustained growth numbers with arrivals up 17.5% in January 2016. A strong year-on-year increase in air seat capacity (+22.8) and the appreciation of the Won relative to the Canadian currency (+6.4%) made Canada a more attractive destination for Korean travellers in January 2016.
- India (+6.8%) posted strong visitation growth in January 2016 achieving a new arrival peak for that month at 8,375 visitors. The implementation of the CAN+ visa combined with a more favorable exchange rate (India, +8.7%) and a significant increase in direct air capacity (+56.8% fuelled visitation growth from India.
- Australia posted sustained arrival growth in January 2016 (+5.7%) despite the downturn in the commodity sector and the decline in air seat capacity (-4.8%) during that month. This helped Australia achieve a new all-time January arrival peak at 20,640 visitors.
- Despite the strong appreciation of the Yen against the loonie (+18%) and an increase in air seat capacity (+6.9%), overnight arrivals from Japan remained stable in January (+0.2%).

## DC Asia-Pacific Arrivals by Port of Entry

- About 80% of arrivals from China, two thirds from India and Japan, half from South Korea and a third from Australia were direct air arrivals from overseas during January 2016. Air arrivals via the US accounted for about 51% of total arrivals from Australia, 29% from Japan, 19% from South Korea, 15% from China and 11% from India.
- A notable year-on-year variation is the 313% increase in arrivals from China at YUL as a result of the new Air China flight from Beijing.

			Australia	China	India	Japan	South Korea
Air Arrivals from Overseas	YYZ	Arrivals	949	10,219	3,572	2,180	1,942
		YOY%	22.9%	11.3%	14.7%	-17.0%	21.9%
		% of Total	4.6%	33.4%	42.7%	20.6%	15.9%
	YVR	Arrivals	6,703	12,757	843	4,214	4,508
		YOY%	0.3%	44.6%	7.8%	13.3%	3.8%
		% of Total	32.5%	41.7%	10.1%	39.8%	37.0%
	YUL	Arrivals	135	1,245	420	95	82
		YOY%	0.7%	313.6%	-10.1%	69.6%	-55.2%
		% of Total	0.7%	4.1%	5.0%	0.9%	0.7%
	YYC	Arrivals	133	14	228	289	44
		YOY%	58.3%	-36.4%	-42.1%	-22.7%	-55.1%
		% of Total	0.6%	0.0%	2.7%	2.7%	0.4%
	All other airports	Arrivals	58	48	142	9	18
		YOY%	0.8%	0.3%	3.0%	0.1%	0.3%
		% of Total	0.3%	0.2%	1.7%	0.1%	0.1%
Subtotal	Arrivals	7,978	24,283	5,205	6,787	6,594	
	YOY%	2.9%	31.0%	8.0%	-0.8%	5.4%	
	% of Total	38.6%	79.4%	62.2%	64.1%	54.1%	
Air Arrivals via the US	All airports	Arrivals	10,630	4,469	926	3,078	2,353
		YOY%	9.0%	19.2%	15.9%	-1.0%	15.1%
		% of Total	51.5%	14.6%	11.1%	29.1%	19.3%
Sea Arrivals	All sea borders	Arrivals	4	0	5	0	0
		YOY%	0.0%	0.0%	-72.2%	0.0%	0.0%
		% of Total	0.0%	0.0%	0.1%	0.0%	0.0%
Land Arrivals via US	All land borders	Arrivals	2,030	1,815	2,237	716	3,250
		YOY%	0.5%	4.4%	1.6%	18.2%	56.3%
		% of Total	9.8%	5.9%	26.7%	6.8%	26.6%
<b>Total Overnight Arrivals</b>			<b>20,642</b>	<b>30,567</b>	<b>8,373</b>	<b>10,581</b>	<b>12,197</b>

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

# LATIN AMERICA

**DC Latin America Arrivals to Canada**

CURRENT MONTH:

**+1.6% ↑ YOY**



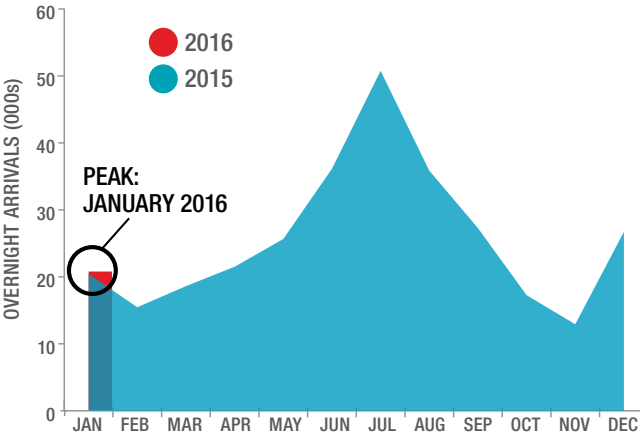
## Overnight Arrivals

	Jan. 2016	
	Arrivals	% Change YOY
DC Latin America	20,792	1.6
Brazil	8,281	-18.8
Mexico	12,511	22.0
Rest of Latin America	14,915	8.6
<b>Total Latin America</b>	<b>35,707</b>	<b>4.4</b>

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



## Arrival Trend Plot – Total DC Latin America



## DC Latin America: Key Indicators

		Brazil	Mexico
<b>Air Seat Capacity<sup>i</sup></b>	Current Month	20.0%	56.4%
<b>Exchange Rate<sup>ii</sup></b>	Current Month	-23.4%	-3.9%
<b>Arrival Peak<sup>iii</sup></b>	Year	2015	2008
	Current % of Previous Peak	81.2%	92.4%

Sources:  
 i. Diio Mi. Year on year % change.  
 ii. Bank of Canada. Year on year % change.  
 iii. Statistics Canada International Travel Survey.

## LATIN AMERICA

- Canada welcomed 20,790 visitors from DC Latin America markets in January 2016, up 1.6% compared to January 2015, surpassing the previous arrivals peak registered in January 2015.
- January 2016 was the third consecutive month of double-digit arrival growth from Mexico. A number of factors helped maintain the growth momentum for Mexican arrivals to Canada. First, air seat capacity increased 56.4% during January 2016 (relative to the same month in 2015) with the introduction of new flights from Mexico City to Montreal and Vancouver. Second, the CAN+ visa program implemented in 2014 continued to facilitate visitation growth from this country. Third, the strong appreciation of the US dollar over the past year has made the US a more expensive destination for Mexican travellers, many of whom are now turning to Canada as an alternative leisure destination.
- Arrivals from Brazil declined significantly in the first month of the year. At 8,280 overnight visitors in January 2016, arrivals declined by 18.8% relative to the same month in 2015. The benefits of the strong increase in air seat capacity to Canada (+20%) in January 2016 was offset by a plummeting Brazilian Real (-23%), a declining economy and political unrest at the beginning of 2016.

### DC Latin America Arrivals by Port of Entry

- About half of arrivals from Mexico and Brazil were direct air arrivals from overseas during January 2016. Air arrivals via the US accounted for about 46% of total arrivals to Canada from Brazil and 20% from Mexico. Arrivals by land accounted for 29% of total arrivals from Mexico and 7% from Brazil.
- Notable year-on-year variations include significant increases in arrivals from Mexico at Toronto-Pearson (YYZ) (+19%), Montreal-Trudeau (YUL) (+31%) and Vancouver International (YVR) (+66%). A 44% increase in arrivals from Brazil to Toronto-Pearson was recorded in January 2016 due to the new Air Canada flight from Rio de Janeiro.

		Brazil	Mexico	
Air Arrivals from Overseas	YYZ	Arrivals	3,618	2,899
		YOY%	-21.0%	18.9%
		<b>% of Total</b>	<b>43.7%</b>	<b>23.2%</b>
	YVR	Arrivals	138	2,358
		YOY%	86.5%	66.2%
		<b>% of Total</b>	<b>1.7%</b>	<b>18.8%</b>
	YUL	Arrivals	131	941
		YOY%	0.8%	30.7%
		<b>% of Total</b>	<b>1.6%</b>	<b>7.5%</b>
	YYC	Arrivals	0	110
		YOY%	-100.0%	-26.7%
		<b>% of Total</b>	<b>0.0%</b>	<b>0.9%</b>
	All other airports	Arrivals	19	126
		YOY%	0.4%	2.7%
		<b>% of Total</b>	<b>0.2%</b>	<b>1.0%</b>
Subtotal	Arrivals	3,906	6,434	
	YOY%	-18.5%	31.9%	
	<b>% of Total</b>	<b>47.2%</b>	<b>51.4%</b>	
Air Arrivals via the US	All airports	Arrivals	3,802	2,478
		YOY%	-21.4%	10.6%
		<b>% of Total</b>	<b>45.9%</b>	<b>19.8%</b>
Sea Arrivals	All sea borders	Arrivals	0	0
		YOY%	-100.0%	-100.0%
		<b>% of Total</b>	<b>0.0%</b>	<b>0.0%</b>
Land Arrivals via US	All land borders	Arrivals	573	3,599
		YOY%	-88.2%	60.6%
		<b>% of Total</b>	<b>6.9%</b>	<b>28.8%</b>
<b>Total Overnight Arrivals</b>		<b>8,281</b>	<b>12,511</b>	

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

# COMPETITIVE REVIEW

Trips From:		Trips To:			
		Canada		Australia	
			YOY Change		YOY Change
<b>Total International</b>		<b>786,533</b>	<b>10.3%</b>	<b>620,500</b>	<b>13.6%</b>
<b>United States</b>		526,018	10.2%	51,800	15.4%
<b>Canada</b>		...	...	15,600	9.9%
<b>Europe</b>	<b>United Kingdom</b>	26,326	1.1%	71,800	2.0%
	<b>France</b>	22,122	6.2%	11,300	0.9%
	<b>Germany</b>	11,574	7.7%	17,700	-1.1%
<b>Asia-Pacific</b>	<b>Australia</b>	20,642	5.7%	...	...
	<b>Japan</b>	10,581	0.2%	24,600	24.2%
	<b>South Korea</b>	12,197	17.5%	28,600	17.2%
	<b>China</b>	30,567	27.2%	114,300	55.1%
	<b>India</b>	8,373	6.8%	15,900	3.2%
<b>Latin America</b>	<b>Mexico</b>	12,511	22.0%	700	-12.5%
	<b>Brazil</b>	8,281	-18.8%	3,900	-23.5%
<b>Total DC Key Markets</b>		<b>689,192</b>	<b>9.8%</b>	<b>356,200</b>	<b>19.6%</b>

Sources:  
 Statistics Canada, International Travel Survey Border Counts.  
 Australian Bureau of Statistics, Overseas Arrivals and Departures, cat. no. 3401.0.

- In January 2016, Canada registered a slightly lower increase in total international arrivals (+10.3%) than Australia (+13.6%) over January 2015.
- In DC's key markets, Canada registered lower growth in January, with arrivals increasing 9.8% – compared to 19.6% in Australia – relative to the same month in 2015. However, arrivals from DC markets totalled over 689,190 trips to Canada compared to 356,200 in Australia during that period.
- Australia posted a 9.9% increase in arrivals from Canada in January. In comparison, Australian arrivals to Canada increased 5.7% during the same period.
- Australia registered larger gains than Canada in arrivals from the US (+15.4% vs +10.2%), China (+55.1% vs +27.2%), Japan (+24.2% vs +0.2%) and the UK (+2% vs +1.1%) in January 2016.
- Canada registered larger gains than Australia in arrivals from all other DC key markets in 2016, outpacing its competitor on overnight arrivals France (+6.2% vs 0.9%), Mexico (+22% vs -12.5%), South Korea (+17.5% vs +17.2%) and India (+6.8% vs +3.2%).



# INTERNATIONAL ARRIVALS BY PROVINCE OF ENTRY

## Overnight Arrivals by Province of Entry

		Newfoundland and Labrador	Prince Edward Island	Nova Scotia	New Brunswick	Québec	Ontario
Total One or more nights	2016	1,958	6	2,428	5,234	123,001	348,788
	Variance YOY%	2.3%	0.0%	-8.0%	27.9%	13.6%	8.0%
	Change YOY	44	6	(212)	1,142	14,721	25,779
US Residents by Automobile	2016	0	6	0	5,075	45,111	139,594
	Variance YOY%	0.0%	0.0%	0.0%	31.4%	15.2%	7.8%
	Change YOY	-	-	-	1,213	5,946	10,054
US Residents by Non-Automobile	2016	430	-	1,375	118	33,060	102,127
	Variance YOY%	0.0%	0.0%	-11.1%	-19.2%	9.7%	9.8%
	Change YOY	430	-	(171)	(28)	2,913	9,079
Residents from Other Countries	2016	1,528	0	1,053	41	44,830	107,067
	Variance YOY%	15.8%	0.0%	-3.7%	-32.8%	15.0%	6.6%
	Change YOY	209	-	(41)	(20)	5,862	6,646

Source: International Travel Survey, Statistics Canada.

## Overnight Arrivals by Province of Entry

		Manitoba	Saskatchewan	Alberta	British Columbia	Yukon	CANADA
Total One or more nights	2016	8,586	3,141	39,537	252,398	1,451	786,528
	Variance YOY%	11.8%	-24.5%	-0.1%	14.4%	22.3%	10.3%
	Change YOY	909	(1,019)	(45)	31,761	265	73,351
US Residents by Automobile	2016	4,484	1,482	3,088	102,151	1,321	302,306
	Variance YOY%	7.0%	10.3%	1.9%	12.8%	31.4%	10.9%
	Change YOY	295	138	57	11,593	316	29,612
US Residents by Non-Automobile	2016	3,709	1,499	23,906	57,455	22	223,707
	Variance YOY%	24.9%	-24.9%	1.5%	13.5%	-33.3%	9.3%
	Change YOY	740	(497)	357	6,815	(11)	18,949
Residents from Other Countries	2016	393	160	12,543	92,792	108	260,515
	Variance YOY%	-24.3%	-79.9%	-3.5%	16.8%	3.8%	10.5%
	Change YOY	(126)	(638)	(459)	13,353	4	24,790

- During January 2016, the largest increases in total international arrivals to Canada were recorded through British Columbia (+31,761, +14.4%), Ontario (+25,779, +8%) and Quebec (+14,721, +13.6%).
- All three provinces (Ontario, BC and Quebec) registered strong gains in US arrivals by auto and non-auto modes as well as from overseas during January 2016.
- Five provinces recorded double-digit growth in arrivals by automobile from the US, with New Brunswick and the Yukon leading the way (+31.4%), followed by Quebec (+15.4%), BC (+12.8%) and Saskatchewan (+10.3%).
- Saskatchewan, Nova Scotia and Alberta recorded a contraction of total international arrivals during January 2016 partly because of the decline in business travel resulting from the downturn in the oil and gas and commodity sectors.

# CANADIAN OUTBOUND TRAVEL

## Overnight Trips by Canadians

	Jan. 2016	16/15 Jan. % Change
United States	1,356,784	-13.4
Other Countries	1,333,740	9.6
<b>Total Trips from Canada</b>	<b>2,690,524</b>	<b>-3.4</b>

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

- In January 2016, the number of overnight trips by Canadians to international destinations declined by 3.4% to 2,690,500. While the number of overnight trips by Canadians to the US fell by 13.4% year-over-year, it rose by 9.6% to overseas destinations.
- Amid signs of a slowing Canadian economy – including the plunge of oil prices – at the end of 2015 and in early 2016, the index of consumer confidence published by the Conference Board of Canada declined in January to land at 80.1 (2014 = 100), down from 91 in December 2015, reaching its lowest level since the end of 2011.
- In January 2016, most Canadian residents returned to the country from abroad through Ontario (1.27 million re-entries, -2.5%), Quebec (534,154 re-entries, +2.2%) and BC (485,360 re-entries, -5.7%).
- In January 2016, Canadian residents returning home from the US primarily re-entered Canada through Ontario (625,560 re-entries, -14.8%), BC (283,200 re-entries, -14.6%) and Quebec (226,940 re-entries, -4.2%).

# ACCOMMODATION

## Hotel Performance Indicators by Province

	Occupancy Rates		Average Daily Rate (ADR)		Revenue Per Available Room (RevPAR)	
	Jan. 2016	YOY <sup>^</sup> Change	Jan. 2016	YOY Change	Jan. 2016	YOY Change
<b>Alberta<sup>1</sup></b>	42.4%	-11.5	\$129.50	-8.0%	\$54.94	-27.6%
<b>British Columbia</b>	50.8%	-0.1	\$143.42	5.3%	\$72.82	5.1%
<b>Saskatchewan</b>	45.9%	-5.5	\$127.12	-1.8%	\$58.38	-12.3%
<b>Manitoba</b>	51.8%	0.3	\$118.07	0.2%	\$61.22	0.7%
<b>Ontario</b>	51.6%	1.6	\$128.57	4.0%	\$66.35	7.3%
<b>Quebec</b>	49.7%	0.4	\$137.74	2.9%	\$68.42	3.8%
<b>New Brunswick</b>	35.6%	0.3	\$107.76	3.6%	\$38.38	4.4%
<b>Nova Scotia</b>	42.3%	3.9	\$117.82	4.7%	\$49.80	15.4%
<b>Newfoundland</b>	38.6%	-9.0	\$133.02	-1.1%	\$51.41	-19.7%
<b>Prince Edward Island</b>	43.7%	6.6	\$102.11	1.0%	\$44.62	19.0%
<b>Northwest Territories</b>	70.8%	21.2	\$142.94	-7.9%	\$101.25	31.5%
<b>Yukon</b>	42.6%	7.4	\$113.06	5.7%	\$48.20	28.0%
<b>Canada</b>	<b>48.4%</b>	<b>-1.4</b>	<b>\$132.63</b>	<b>1.4%</b>	<b>\$64.16</b>	<b>-1.6%</b>

\*Based on the operating results of 223,202 rooms (unweighted data).

<sup>^</sup> Percentage points.

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

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- During January 2016, the National Occupancy Rate decreased 1.4 points (relative to January 2015) to 48.4% amid mixed performance indicators for the accommodation sector across Canada.
- With the downturn in the resource and commodity sectors impacting business travel, hotel performance in oil and gas producing provinces sustained contractions in occupancy rates in January relative to the previous year, with the strongest impact being felt in the three provinces with a large oil and gas sector: Alberta (-11.5 points), Newfoundland and Labrador (-9 points) and Saskatchewan (-5.5 points). Both the average daily rate and the revenue per available room (RevPar) declined significantly in the face of lower demand and occupancy. Alberta recorded the strongest decline (-27.6%) in the January RevPar (relative to the previous year), followed by Newfoundland and Labrador (-19.7%) and Saskatchewan (-12.3%).
- On a brighter note, most other Canadian regions recorded good overall hotel performance in January 2016. Occupancy rose 21.2 points in the Northwest Territories, 7.4 points in the Yukon, 3.9 points in Nova Scotia and 1.6 points in Ontario compared to January 2015. Particularly strong yearly RevPar increases were recorded in the Northwest Territories (+31.5%), the Yukon (+28%), PEI (+19%) and Nova Scotia (+15.4%).
- Resort destinations in Alberta and British Columbia (Whistler) registered a strong performance during January 2016 with occupancy rates up 1.6 points and 7.1 points, respectively, and their annual RevPar up 4.8% and 24.6% relative to January 2015.

# ACCOMMODATION

## Hotel Performance Indicators by Property Type

	Occupancy Rates		Average Daily Rate (ADR)	
	Jan.2016	YOY^ Change	Jan.2016	YOY Change
<b>Property Size</b>				
Under 50 rooms	34.2%	-5.4	\$97.78	0.4%
50-75 rooms	41.7%	-3.1	\$103.04	-2.5%
76-125 rooms	46.1%	-3.2	\$118.98	-0.8%
126-200 rooms	49.7%	-0.7	\$122.75	1.0%
201-500 rooms	52.2%	-0.1	\$154.28	2.8%
Over 500 rooms	55.5%	2.4	\$167.90	2.3%
<b>Total</b>	<b>48.4%</b>	<b>-1.4</b>	<b>\$132.63</b>	<b>1.4%</b>
<b>Property Type</b>				
Limited Service	43.3%	-3.6	\$107.38	-0.9%
Full Service	50.1%	-0.7	\$135.87	0.9%
Suite Hotel	58.3%	0.3	\$140.09	2.2%
Resort	50.7%	2.8	\$212.86	5.8%
<b>Total</b>	<b>48.4%</b>	<b>-1.4</b>	<b>\$132.63</b>	<b>1.4%</b>
<b>Price Level</b>				
Budget	41.2%	-0.2	\$85.31	2.1%
Mid-Price	49.4%	-2.4	\$127.38	-0.1%
Upscale	54.5%	0.6	\$206.09	4.8%
<b>Total</b>	<b>48.4%</b>	<b>-1.4</b>	<b>\$132.63</b>	<b>1.4%</b>

- Among the different hotel property sizes, the larger hotels (greater than 125 rooms) generally fared better in terms of occupancy and average daily rates, particularly in Central Canada and to a lesser extent in Atlantic Canada.
- Suite hotels were the property type that recorded the highest occupancy (58.3%) in January 2016. Suite hotels were the best performers of hotel classes in Atlantic, Central and Western Canada January 2016.
- Resorts recorded the highest growth in occupancy rate (+2.8 points) and ADR (+5.8 points) nationwide during January 2016 relative to the same month last year. Resort properties performed particularly well in Western Canada with occupancy up 2.4 points and ADR up 7.6 points.