



# TOURISM SNAPSHOT

**Q3 2019**

An ongoing monitor of the performance of Canada's tourism sector

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52°52'24.3"N 117°57'15.0"W

Jasper National Park

Banff

Alberta

Canada

[www.destinationcanada.com](http://www.destinationcanada.com)

# Important note regarding the Frontier Counts data

Destination Canada reports on overnight arrivals. Numbers may differ to those reported by Statistics Canada, which include same-day arrivals.

**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.

<sup>1</sup> Note the caveat from Statistics Canada associated with the September 2019 data, available [here](#).

## Quick links

# Key highlights – September 2019

- In September 2019, the number of overnight visitors to Canada reached 2.2 million, representing the second highest level of visitors ever for that month after 2017. Accounting for 51.5% of total overnight arrivals, air arrivals to Canada increased 6.0% primarily as a result of a surge in US air arrivals (+14.5%).
- The September 2019 contraction in auto arrivals from the US was first and foremost a result of the travel surge associated with the Labour Day long weekend falling in August this year as opposed to September in 2018. Growth in US auto arrivals over the August to September 2019 period expanded by 3.3%, suggesting a positive underlying trend.
- In September 2019, year-over-year growth in non-land arrivals was led by Mexico (+12.0%), the UK (+9.2%), and France (+9.1%). While all three markets saw sustained growth in cruise and air arrivals direct from overseas, only Mexico saw expanded air arrivals via the United States.
- Meanwhile, gains in Australian air arrivals direct from overseas (+4.5%) marginally offset contractions in cruise arrivals (-3.5%) and air arrivals via the US (-0.5%).
- Faced with a slowing economy, air arrivals direct from overseas from China declined in September 2019 (-17.6%), which, combined with a sustained contraction in air arrivals via the US (-18.1%), contributed to an overall drop in non-land arrivals (-16.6%). Destination Canada advises interpreting this drop after the October arrivals numbers are reported. Golden Week, a key national holiday in the first week of October, had its primary travel weekend fall in September in 2018, whereas in 2019 it only partially fell in September.

## Arrivals of international overnight visitors to Canada – September 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	
US	1,373,800	0.7%											
Auto	676,415	-5.5%											
Air	495,617	14.5%											
Auto & Air	1,172,032	2.0%											
Other	201,768	-6.2%											
DC Long-Haul	515,479	4.1%	443,491	-1.3%	329,474	-1.2%	61,576	-5.3%	52,441	2.8%	71,988	57.1%	
UK	117,055	17.0%	101,602	9.2%	69,003	3.0%	9,425	-6.8%	23,174	45.5%	15,453	121.3%	
France	81,082	13.5%	71,174	9.1%	61,751	10.7%	8,761	-4.0%	662	88.6%	9,908	59.6%	
China	86,857	-8.4%	71,496	-16.6%	61,318	-17.6%	7,335	-18.1%	2,843	18.5%	15,361	68.2%	
Mexico	44,312	20.9%	37,452	12.0%	29,321	9.3%	5,519	23.0%	2,612	22.7%	6,860	114.4%	
Germany	58,829	-11.3%	51,855	-13.0%	37,626	-0.9%	4,906	-11.2%	9,323	-42.0%	6,974	3.2%	
Australia	43,692	2.2%	38,902	0.4%	14,612	4.5%	13,251	-0.5%	11,039	-3.5%	4,790	19.7%	
India	28,411	1.4%	24,142	-4.3%	19,402	-2.9%	3,789	-9.4%	951	-11.0%	4,269	52.5%	
South Korea	24,756	0.1%	19,738	-0.1%	15,628	-0.5%	3,128	-5.2%	982	31.1%	5,018	1.1%	
Japan	30,485	0.5%	27,130	-4.9%	20,813	-4.1%	5,462	-9.0%	855	1.4%	3,355	88.0%	
Total Non-US	810,853	6.1%	699,515	0.7%	523,785	1.4%	106,509	-5.6%	69,221	6.3%	111,338	60.2%	
<b>Total</b>	<b>2,184,653</b>	<b>2.7%</b>											

Source: Statistics Canada, Frontier Counts Custom Tabulations

# Key highlights – Q3 2019

- In the midst of a travel environment disrupted by global trade frictions and uncertainties, Canada welcomed over 8.9 million overnight international visitors in the third quarter period spanning July to September 2019.
- Arrivals from the United States accounted for the lion's share of visitors to Canada in Q3 2019 (67.9%), while those from Destination Canada's nine long-haul markets represented 19.6% and those from the rest of the world represented 12.4% of visitors.
- Most of the gains in overnight arrivals during the third quarter originated from the United States as a result of spectacular recovery in air arrivals (+12.7%) and robust gains in automobile arrivals (+3.9%).

## Arrivals of international overnight visitors to Canada – Q3 2019

Q3-19 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				
US	6,052,644	4.8%											
Auto	3,544,235	3.9%											
Air	1,790,861	12.7%											
Auto & Air	5,335,096	6.7%											
Other	717,548	-7.3%											
DC Long-Haul	1,748,895	6.7%	1,449,193	-0.6%	1,137,188	-0.2%	205,744	-4.4%	106,261	3.4%	299,702	64.9%	
UK	385,500	15.2%	317,153	3.1%	248,512	1.3%	32,998	-5.2%	35,643	30.4%	68,347	151.9%	
France	300,523	12.4%	259,244	7.8%	227,991	11.0%	29,582	-12.6%	1,671	34.4%	41,279	53.2%	
China	284,580	-2.9%	224,978	-13.0%	193,033	-13.2%	22,960	-18.8%	8,985	11.6%	59,602	72.4%	
Mexico	167,383	17.4%	137,171	4.8%	103,645	0.6%	23,105	22.6%	10,421	14.7%	30,212	158.5%	
Germany	196,925	2.1%	165,591	-0.8%	134,192	3.6%	15,675	-7.0%	15,724	-23.4%	31,334	20.9%	
Australia	130,327	1.5%	112,598	-2.6%	48,669	-1.0%	41,774	0.5%	22,155	-10.7%	17,729	38.5%	
India	102,578	7.5%	82,938	-3.7%	65,260	-2.0%	12,646	-7.8%	5,032	-12.9%	19,640	111.4%	
South Korea	83,271	-6.6%	64,212	2.1%	49,398	0.7%	11,342	6.2%	3,472	10.5%	19,059	-27.5%	
Japan	97,808	2.4%	85,308	-3.5%	66,488	-3.6%	15,662	-6.0%	3,158	14.0%	12,500	75.4%	
Total Non-US	2,856,884	7.6%	2,374,578	0.1%	1,858,965	1.2%	367,414	-6.7%	148,199	4.8%	482,306	70.5%	
<b>Total</b>	<b>8,909,528</b>	<b>5.7%</b>											

Source: Statistics Canada, Frontier Counts Custom Tabulations

# Key highlights – Year-to-date September 2019

- Year-to-date September 2019, international overnight arrivals reached a new peak of 17.9 million visitors, with arrivals of US residents surpassing the 12 million thresholds for the first time since 2004 and arrivals from the rest of the world topping a new high of 5.8 million visitors.
- From January to September 2019, US arrivals by automobile (+3.3%) and air (+13.0%) averaged a combined year-over-year growth of +6.7%.
- Year-to-date September 2019, cruise arrivals (+14.6%) were the only transport mode of entry into Canada to show sustained gains from China.
- Year-to-date September 2019, non-land arrivals from India and South Korea remained in positive territory (+5.9% and +1.0%, respectively).
- Despite gains in cruise arrivals (+11.5%), non-land arrivals from Japan were down 4.3% so far in 2019 as a result of persistent contractions in air arrivals direct from overseas and via the US.

## Arrivals of international overnight visitors to Canada – Year-to-date September 2019

Year-to-date September 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*
US	12,141,876	3.8%										
Auto	6,876,027	3.3%										
Air	4,043,432	13.0%										
Auto & Air	10,919,459	6.7%										
Other	1,222,417	-16.2%										
DC Long-Haul	3,516,038	6.4%	2,988,871	0.9%	2,370,875	2.1%	454,163	-5.7%	163,833	2.9%	527,167	53.5%
UK	726,448	11.8%	609,792	0.8%	488,323	-0.3%	68,819	-6.1%	52,650	25.4%	116,656	162.5%
France	542,584	11.7%	479,285	7.5%	418,712	14.3%	58,415	-25.1%	2,158	27.3%	63,299	59.0%
China	587,671	-1.9%	481,931	-9.1%	416,432	-8.4%	51,918	-18.5%	13,581	14.6%	105,740	53.5%
Mexico	389,181	24.5%	328,800	12.3%	257,121	9.0%	57,208	30.5%	14,471	9.9%	60,381	205.2%
Germany	344,812	0.3%	296,980	-1.3%	243,618	2.6%	33,644	-7.9%	19,718	-26.7%	47,832	11.2%
Australia	286,096	2.2%	251,735	-0.6%	118,004	3.4%	94,145	-2.2%	39,586	-7.6%	34,361	28.3%
India	272,283	14.2%	232,952	5.9%	191,666	7.6%	30,883	-0.6%	10,403	-2.8%	39,331	113.3%
South Korea	171,113	-14.2%	134,869	1.0%	104,277	-0.8%	24,654	6.6%	5,938	12.4%	36,244	-45.1%
Japan	195,850	-0.4%	172,527	-4.3%	132,722	-4.9%	34,477	-4.4%	5,328	11.5%	23,323	43.6%
Total Non-US	5,804,347	7.2%	4,952,932	1.1%	3,904,244	2.8%	816,422	-6.9%	232,266	4.9%	851,415	65.1%
<b>Total</b>	<b>17,946,223</b>	<b>4.9%</b>										

Source: Statistics Canada, Frontier Counts Custom Tabulations

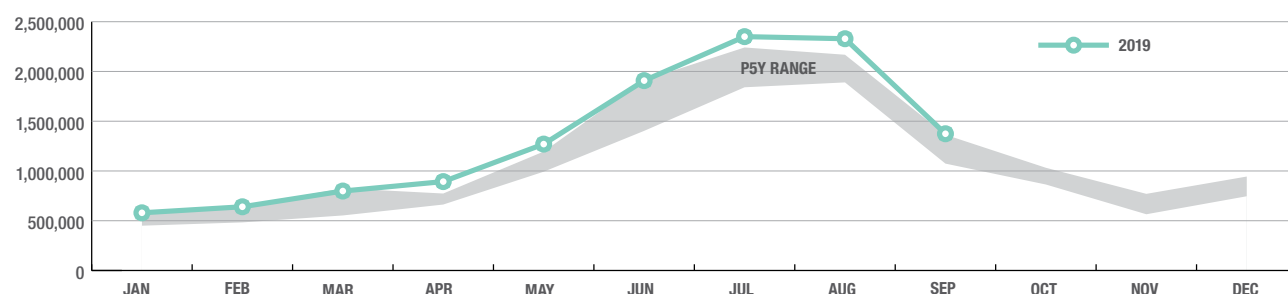
# UNITED STATES

## Current Trends

Over the third quarter (Q3) of 2019, overnight arrivals from the United States maintained the momentum gained over quarter two (Q2) (+4.9%), expanding by 4.8% in Q3 2019 compared to Q3 2018. This performance was largely driven by double-digit gains in air arrivals (+12.7%) for a second consecutive quarter, which stood in contrast to contractions in air arrivals sustained a year earlier. Gains in US auto arrivals (+3.9%) over Q3 2019

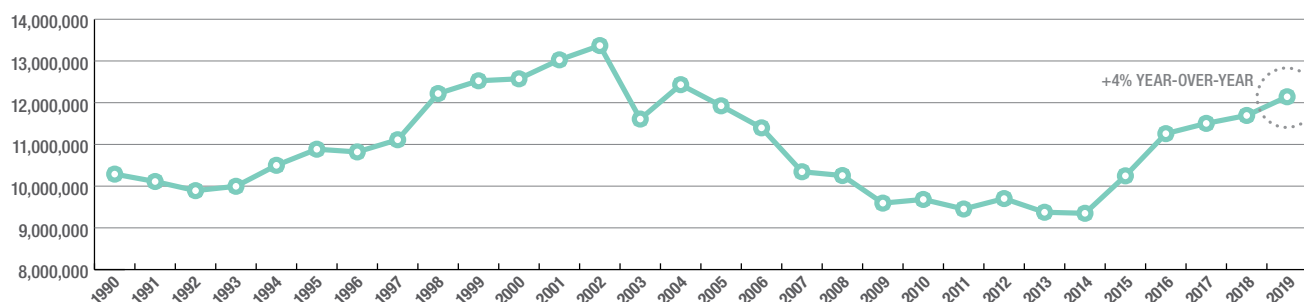
were a welcome relief following subdued gains over the same quarter in 2018, given that travel to Canada was affected by forest fires in Western Canada during much of the third quarter of 2018. Over the Q3 2019 period, the strengthened US dollar (+1.0%) helped offset the potential impact of a slight weakening in consumer confidence on travel to Canada.

## Overnight Arrivals by Month: Past 5-Year Trend



Source: Statistics Canada, Frontier counts custom tabulations

## September Year-to-date Arrivals Long-Term Trend



Source: Statistics Canada, Frontier counts custom tabulations

## Overnight Arrivals by Mode

Overnight Arrivals	Q1	Year-over-year change	Q2	Year-over-year change	Q3	Year-over-year change	Q4	Year-over-year change
Total (all modes)	2,018,152	-1.1%	4,071,080	4.9%	6,052,644	4.8%		
✈️ Air	843,851	4.5%	1,408,720	19.3%	1,790,861	12.7%		
🚗 Auto	1,096,715	-2.0%	2,235,077	5.0%	3,544,235	3.9%		
🚶 Other	77,586	-31.8%	427,283	-25.1%	717,548	-7.3%		

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

# UNITED STATES

## Overnight Arrivals by Province - Q3 2019

Overnight Arrivals	Total (all modes)	✈️ Air	🚗 Auto	🗨️ Other
Alberta	337,248	240,161	88,644	8,443
YOY* change	5.7%	7.5%	2.8%	-10.3%
British Columbia	1,600,924	475,050	738,107	387,767
YOY change	5.2%	20.1%	3.9%	-6.6%
Saskatchewan	35,078	7,461	26,615	1,002
YOY change	5.6%	-3.3%	8.3%	7.6%
Manitoba	84,126	24,808	57,929	1,389
YOY change	2.5%	5.2%	1.7%	-10.2%
Ontario	2,837,956	721,368	1,984,701	131,887
YOY change	4.0%	11.1%	4.8%	-29.3%
Quebec	758,170	280,099	445,449	32,622
YOY change	4.0%	7.5%	3.7%	-15.5%
Nova Scotia	71,489	35,936	0	35,553
YOY change	-21.0%	63.2%	-100.0%	-34.9%

Overnight Arrivals	Total (all modes)	✈️ Air	🚗 Auto	🗨️ Other
New Brunswick	217,749	540	152,856	64,353
YOY change	21.8%	-15.5%	8.6%	72.6%
Prince Edward Island	164	164	0	0
YOY change	-20.8%	-20.8%	0.0%	0.0%
Newfoundland and Labrador	11,154	1,248	0	9,906
YOY change	65.7%	-36.4%	0.0%	107.8%
Nunavut	38	38	0	0
YOY change	-7.3%	-7.3%	0.0%	0.0%
Yukon	98,548	3,988	49,934	44,626
YOY change	19.6%	4.3%	-5.8%	74.6%

YOY = year-over-year

Source: Statistics Canada, Table 24-10-0043-01 (formerly CANSIM 427-0004)

## 2019 Key Indicators

	Quarter 3	Year-to-date
Exchange Rate <sup>1</sup>	1.0%	3.2%
Air Capacity <sup>2</sup>	0.2%	2.7%
Consumer Confidence Index <sup>3</sup>	100.9	101.1

<sup>1</sup> Bank of Canada

<sup>2</sup> IATA - Diiio SRS Analyser

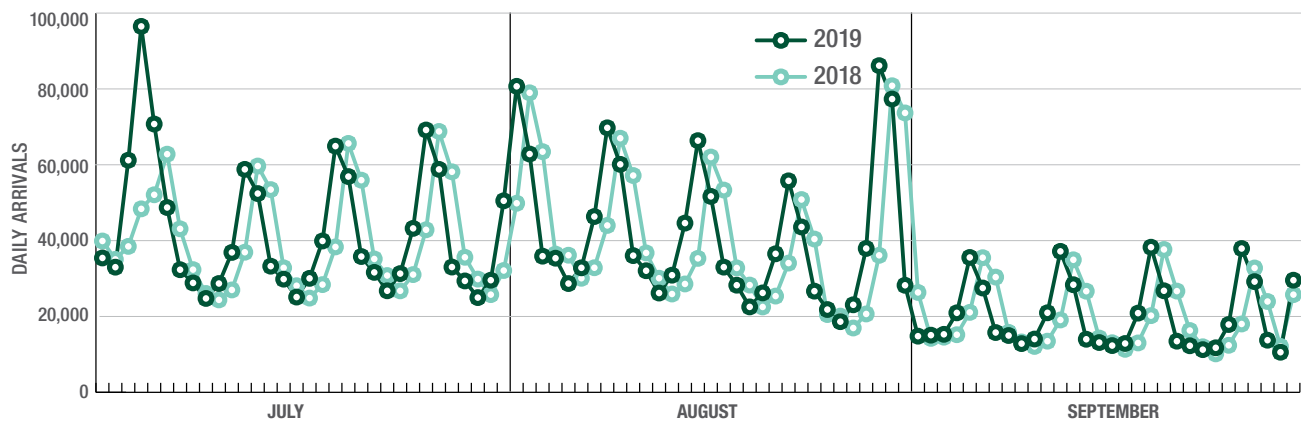
<sup>3</sup> OECD

Notes:

i. Air seat capacity is the variation in the total number of seats on direct commercial scheduled flights during the current quarter and YTD relative to the same periods in the previous year.

ii. The exchange rate variation is calculated on the average value of the Canadian Dollar during the current quarter and YTD relative to the same periods in the previous year.

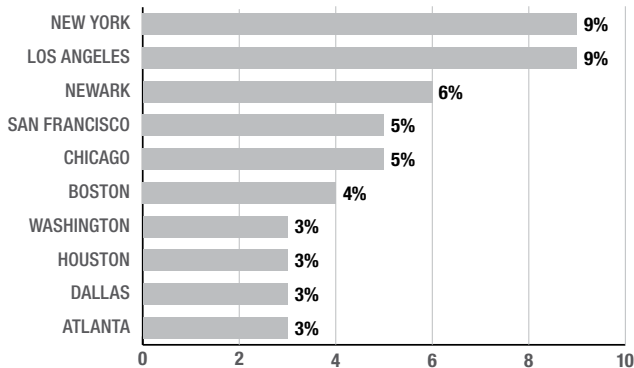
## Daily US Overnight Auto Arrivals - Q3 2019



Source: Statistics Canada, Integrated Primary Inspection Lane statistics

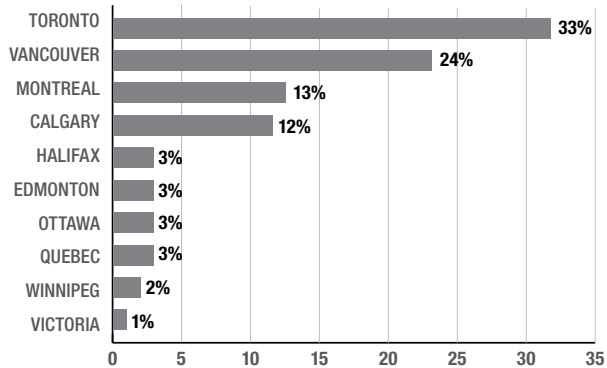
# UNITED STATES

## Top Origin Cities - Q3 2019 (Air Travel)



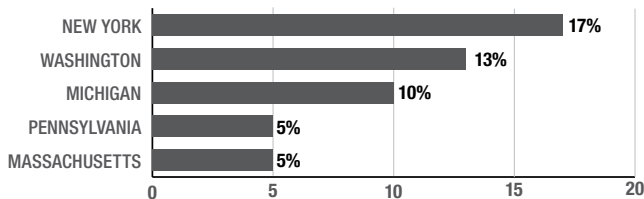
Source: IATA, Global Agency Pro

## Top Destination Cities - Q3 2019 (Air Travel)



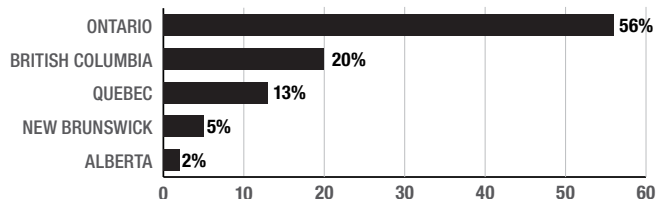
Source: IATA, Global Agency Pro

## Top 5 Origin States - Q3 2019 (Overnight Auto Arrivals)



Source: Statistics Canada, Integrated Primary Inspection Lane statistics

## Top 5 Destination Provinces - Q3 2019 (Overnight Auto Arrivals)



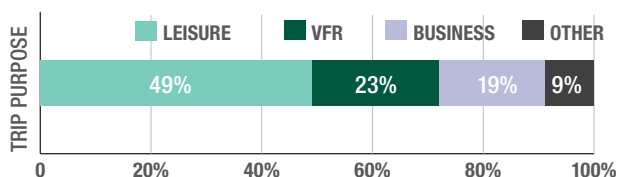
Source: Statistics Canada, Integrated Primary Inspection Lane statistics

## 2018 Key Facts

<b>Canada's market share of total outbound travel<sup>1</sup></b>	12.1%
<b>Global outbound departures rank<sup>1</sup></b>	#2
<b>Global tourism expenditures rank<sup>2</sup></b>	#2

Source: <sup>1</sup>Oxford Economics

<sup>2</sup>UNWTO, World Tourism Barometer



	Total	Leisure	VFR	Business
Average trip length (days)	5.0	4.3	5.4	4.3
Average spend per day	\$140.0	\$171.1	\$66.3	\$225.0
Average trip spend	\$697.1	\$739.4	\$357.7	\$978.4

Source: Statistics Canada, Visitor Travel Survey



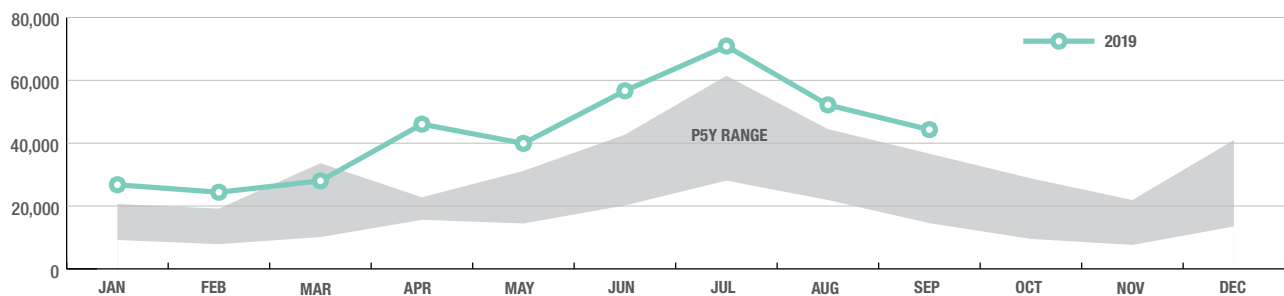
# MEXICO

## Current Trends

Between July and September (Q3) 2019, the number of Mexican overnight visitors reached 167,400, 82.0% of whom travelled to Canada by air or cruise. Combined overnight arrivals from Mexico by air and cruise were up 4.8% year-over-year in Q3 2019. This gain was characterized by a surge in air arrivals via the United States (+22.6%) and in cruise arrivals (+14.7%). Meanwhile, direct air arrivals edged up a marginal +0.6% despite a contraction in direct air service between

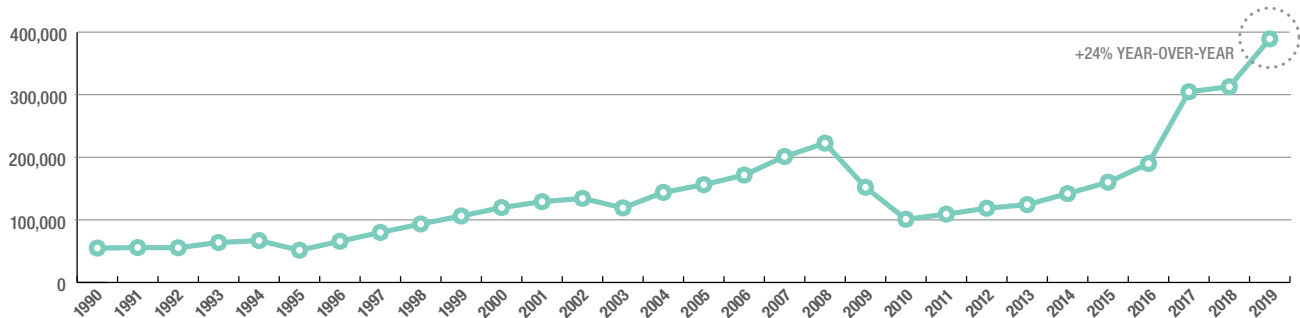
Mexico City and Canada (-8.5% or 17,200 fewer seats, excluding China Southern service to Vancouver). Symptomatic of a healthy tourism demand toward Canada, air service from Mexican carriers (Aeromexico and InterJet) increased to Montreal, Toronto, Calgary and Vancouver (+15.9% or 18,800 additional seats), while Canadian carriers reduced their overall service offerings (-42.1% or 36,000 fewer seats).

## Overnight Arrivals by Month: Past 5-Year Trend



Source: Statistics Canada, Frontier counts custom tabulations

## September Year-to-date Arrivals Long-Term Trend



Source: Statistics Canada, Frontier counts custom tabulations

## Overnight Arrivals by Mode

Overnight Arrivals	Q1	Year-over-year change	Q2	Year-over-year change	Q3	Year-over-year change	Q4	Year-over-year change
Total (all modes)	79,156	7.8%	142,642	47.6%	167,383	17.4%		
✈️ Air direct from overseas	58,426	2.0%	95,050	25.6%	103,645	0.6%		
✈️ Air via US	12,563	5.5%	21,540	64.7%	23,105	22.6%		
🚗 Land	8,161	91.2%	22,008	475.2%	30,212	158.5%		
🌊 Sea	6	0.0%	4,044	-0.8%	10,421	14.7%		

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

# MEXICO

## Overnight Arrivals by Province - Q3 2019

Overnight Arrivals	Total (all modes)	Air direct from overseas	Air via US	Land	Sea
Alberta	7,803	4,498	2,680	625	0
YOY* change	19.5%	-7.2%	84.8%	168.2%	0.0%
British Columbia	53,557	29,593	7,313	7,310	9,341
YOY change	3.9%	-7.9%	24.3%	34.5%	14.8%
Saskatchewan	81	0	13	68	0
YOY change	-10.0%	0.0%	-48.0%	4.6%	0.0%
Manitoba	580	22	314	244	0
YOY change	38.1%	266.7%	11.3%	84.8%	0.0%
Ontario	71,743	44,614	8,425	18,701	3
YOY change	32.3%	3.4%	13.2%	412.9%	0.0%
Quebec	32,131	24,842	4,151	3,108	30
YOY change	14.3%	9.5%	21.3%	55.5%	650.0%

Overnight Arrivals	Total (all modes)	Air direct from overseas	Air via US	Land	Sea
Nova Scotia	514	40	119	0	355
YOY change	-24.2%	-38.5%	-4.8%	-100.0%	-26.5%
New Brunswick	674	0	0	37	637
YOY change	50.4%	0.0%	0.0%	54.2%	50.2%
Newfoundland and Labrador	169	36	89	0	44
YOY change	-50.1%	-70.0%	-53.4%	0.0%	57.1%
Nunavut	12	0	1	0	11
YOY change	20.0%	0.0%	-80.0%	0.0%	120.0%
Yukon	119	0	0	119	0
YOY change	-26.1%	0.0%	-100.0%	-19.6%	0.0%

YOY = year-over-year

Source: Statistics Canada, Frontier counts, custom tabulations

Note: The figures are preliminary estimates and are subject to change.

## 2019 Key Indicators

	Quarter 3	Year-to-date
Exchange Rate <sup>1</sup>	-1.5%	2.0%
Air Capacity <sup>2</sup>	-3.7%	-1.7%
Consumer Confidence Index <sup>3</sup>	101.8	102.5

<sup>1</sup> Bank of Canada

<sup>2</sup> IATA - Diio SRS

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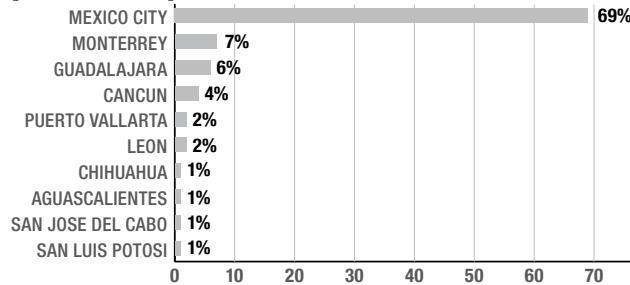
<sup>3</sup> OECD

Notes:

i. Air seat capacity is the variation in the total number of seats on direct commercial scheduled flights during the current quarter and YTD relative to the same periods in the previous year. For Mexico, only direct commercial scheduled flights between Mexico City and Canada are included.

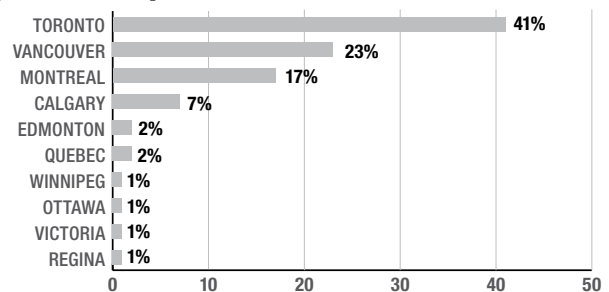
ii. The exchange rate variation is calculated on the average value of the Canadian Dollar during the current quarter and YTD relative to the same periods in the previous year.

## Top Origin Cities - Q3 2019 (Air Travel)



Source: IATA, Global Agency Pro

## Top Destination Cities - Q3 2019 (Air Travel)

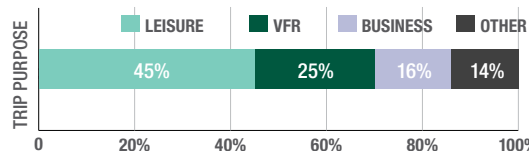


## 2018 Key Facts

Canada's market share of total outbound travel <sup>1</sup>	1.8%
Global outbound departures rank <sup>1</sup>	#12
Global tourism expenditures rank <sup>2</sup>	#30

Source: <sup>1</sup>Oxford Economics

<sup>2</sup>UNWTO, World Tourism Barometer



	Total	Leisure	VFR	Business
Average trip length (days)	25.2	10.5	24.5	46.4
Average spend per day	\$69.7	\$165.0	\$52.6	\$47.3
Average trip spend	\$1,759.6	\$1,736.7	\$1,287.7	\$2,196.8

Source: Statistics Canada, Visitor Travel Survey

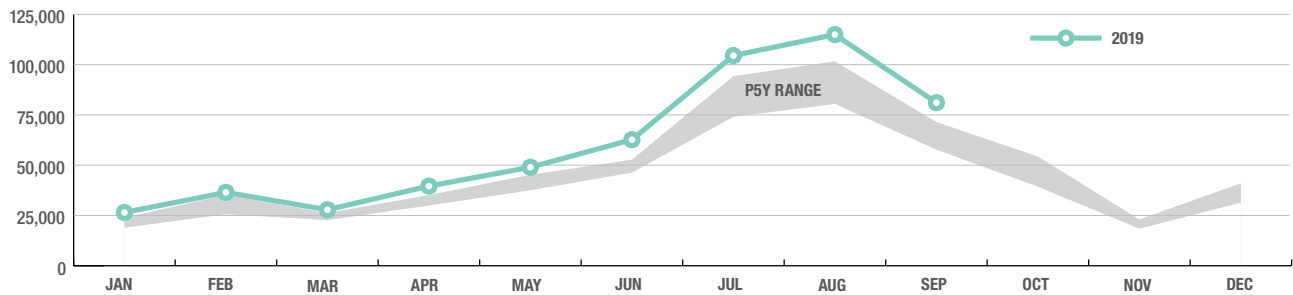
# FRANCE

## Current Trends

Over Q3 2019, the number of overnight arrivals from France reached 300,500 visitors, 86.3% of whom travelled to Canada by air or cruise, making France the second largest long-haul market for travel to Canada. Together air and cruise arrivals increased by 7.8% year-over-year in Q3 2019. For a sixth consecutive quarter, air arrivals (+7.7%) were characterized by a surge in air arrivals direct from overseas (+11.0%) and by a steep decline in air arrivals via the United States (-12.6%). The strong demand for air service between Canada and France

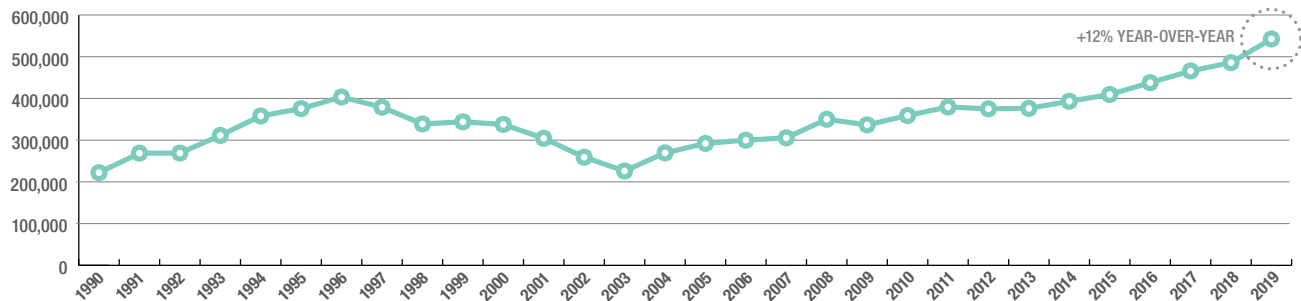
generated an increase in direct air service of 38,500 seats (+6.9%) primarily to Montreal (+13.6%), while air service was maintained to Vancouver and contracted to Toronto (-10.9%). WestJet's Halifax to Paris flight, introduced in Mar 2018, was temporarily halted as part of the global grounding of the Boeing 737 Max 8 aircraft. In lieu of this route, WestJet redeployed the same seat capacity using a Boeing Dreamliner jet on a non-stop flight between Calgary and Paris.

## Overnight Arrivals by Month: Past 5-Year Trend



Source: Statistics Canada, Frontier counts custom tabulations

## September Year-to-date Arrivals Long-Term Trend



Source: Statistics Canada, Frontier counts custom tabulations

## Overnight Arrivals by Mode

Overnight Arrivals	Q1	Year-over-year change	Q2	Year-over-year change	Q3	Year-over-year change	Q4	Year-over-year change
Total (all modes)	90,803	6.4%	151,258	13.6%	300,523	12.4%		
✈️ Air direct from overseas	73,208	27.9%	117,513	13.3%	227,991	11.0%		
✈️ Air via US	11,473	-52.1%	17,360	-13.9%	29,582	-12.6%		
🚗 Land	6,118	48.1%	15,902	81.7%	41,279	53.2%		
🚢 Sea	4	-80.0%	483	11.8%	1,671	34.4%		

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

# FRANCE

## Overnight Arrivals by Province - Q3 2019

Overnight Arrivals	Total (all modes)	✈️ Air direct from overseas	✈️ Air via US	🚗 Land	🌊 Sea
Alberta	4,145	3,233	553	359	0
YOY* change	64.5%	108.0%	-17.7%	22.1%	0.0%
British Columbia	20,748	14,410	1,910	3,539	889
YOY change	5.7%	8.8%	-9.8%	-4.9%	61.3%
Saskatchewan	58	4	37	17	0
YOY change	241.2%	0.0%	1,133.3%	21.4%	0.0%
Manitoba	204	7	101	96	0
YOY change	30.8%	16.7%	34.7%	28.0%	0.0%
Ontario	54,218	24,249	16,453	13,510	6
YOY change	22.3%	0.6%	5.4%	194.0%	-79.3%
Quebec	217,321	184,463	10,186	22,628	44
YOY change	11.7%	13.7%	-31.8%	30.0%	450.0%

Overnight Arrivals	Total (all modes)	✈️ Air direct from overseas	✈️ Air via US	🚗 Land	🌊 Sea
Nova Scotia	1,647	1,448	111	0	88
YOY change	-58.3%	-60.8%	-4.3%	-100.0%	-24.8%
New Brunswick	618	0	3	491	124
YOY change	152.2%	0.0%	-66.7%	161.2%	158.3%
Newfoundland and Labrador	529	116	190	0	223
YOY change	-39.7%	-73.0%	-34.5%	0.0%	42.0%
Nunavut	325	4	24	0	297
YOY change	-6.9%	0.0%	50.0%	0.0%	-10.8%
Yukon	710	57	14	639	0
YOY change	3.5%	5.6%	180.0%	1.9%	0.0%

YOY = year-over-year

Source: Statistics Canada, Frontier counts, custom tabulations

Note: The figures are preliminary estimates and are subject to change.

## 2019 Key Indicators

	Quarter 3	Year-to-date
Exchange Rate <sup>1</sup>	-3.5%	-2.9%
Air Capacity <sup>2</sup>	6.9%	6.9%
Consumer Confidence Index <sup>3</sup>	100.2	99.8

<sup>1</sup> Bank of Canada

<sup>2</sup> IATA - Diio SRS

Analysier

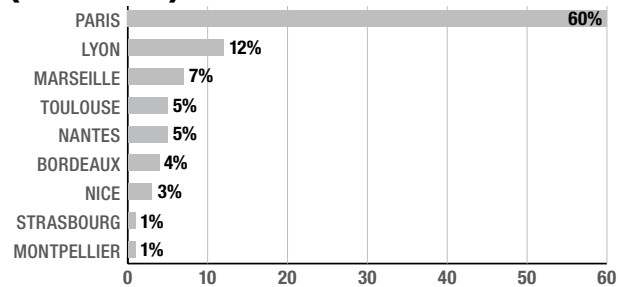
<sup>3</sup> OECD

Notes:

i. Air seat capacity is the variation in the total number of seats on direct commercial scheduled flights during the current quarter and YTD relative to the same periods in the previous year.

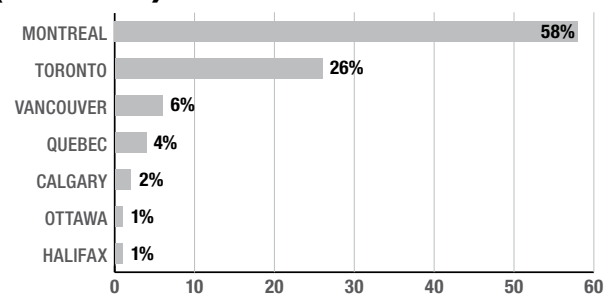
ii. The exchange rate variation is calculated on the average value of the Canadian Dollar during the current quarter and YTD relative to the same periods in the previous year.

## ✈️ Top Origin Cities - Q3 2019 (Air Travel)



Source: IATA, Global Agency Pro

## Top Destination Cities - Q3 2019 (Air Travel)

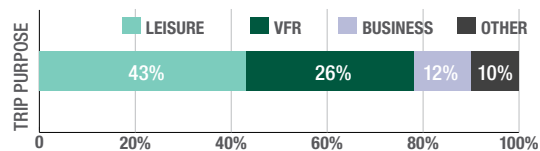


## 2018 Key Facts

Canada's market share of long-haul travel <sup>1</sup>	4.5%
Global outbound departures rank <sup>1</sup>	#8
Global tourism expenditures rank <sup>2</sup>	#5

Source: <sup>1</sup> Oxford Economics

<sup>2</sup> UNWTO, World Tourism Barometer



	Total	Leisure	VFR	Business
Average trip length (days)	18.0	13.1	16.2	16.8
Average spend per day	\$82.6	\$135.7	\$54.4	\$95.3
Average trip spend	\$1,485.8	\$1,782.3	\$879.3	\$1,599.1

Source: Statistics Canada, Visitor Travel Survey

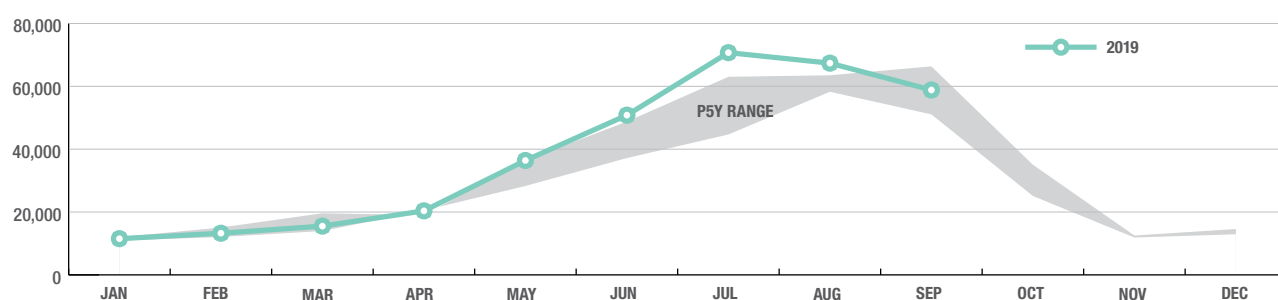
# GERMANY

## Current Trends

Over Q3 2019, overnight arrivals of German residents to Canada reached almost 197,000 visitors, 84.1% of whom entered Canada by air or cruise. Gains in air arrivals direct from overseas (+3.6%) helped offset much of the contractions sustained in German arrivals via the US by air (-7.0%) and cruise (-23.4%). Despite lower German consumer confidence and loss in the purchasing power of the Euro relative to the

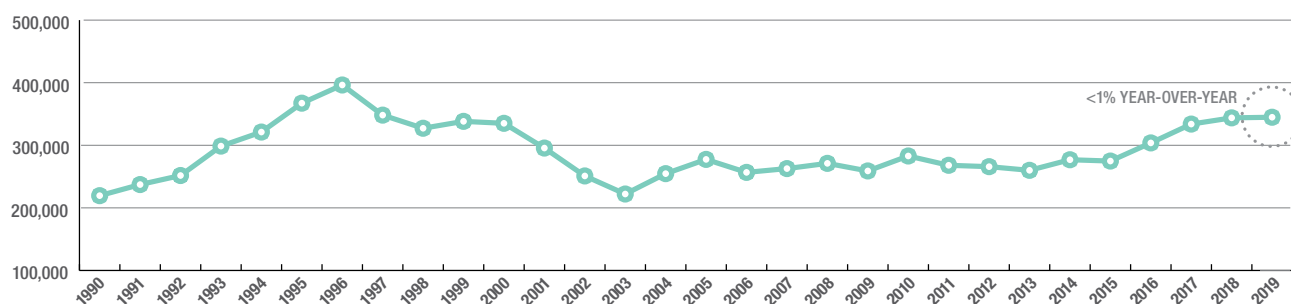
Canadian dollar over Q3 2019, non-stop air capacity between Germany and Canada increased 4.7%, as both German (+4.9% or 11,000 seats) and Canadian (+4.5% or 9,100 seats) air carriers strengthened the routes between the two countries. From Germany, air capacity to Canada increased from all three gateway cities (Frankfort, Munich and Berlin).

## Overnight Arrivals by Month: Past 5-Year Trend



Source: Statistics Canada, Frontier counts custom tabulations

## September Year-to-date Arrivals Long-Term Trend



Source: Statistics Canada, Frontier counts custom tabulations

## Overnight Arrivals by Mode

Overnight Arrivals	Q1	Year-over-year change	Q2	Year-over-year change	Q3	Year-over-year change	Q4	Year-over-year change
Total (all modes)	40,283	-13.7%	107,604	3.2%	196,925	2.1%		
✈️ Air direct from overseas	30,836	-13.3%	78,590	8.9%	134,192	3.6%		
✈️ Air via US	6,601	-13.3%	11,368	-5.8%	15,675	-7.0%		
🚗 Land	2,840	-18.6%	13,658	0.2%	31,334	20.9%		
🌊 Sea	6	0.0%	3,988	-37.5%	15,724	-23.4%		

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

# GERMANY

## Overnight Arrivals by Province - Q3 2019

Overnight Arrivals	Total (all modes)	✈️ Air direct from overseas	✈️ Air via US	🚗 Land	🌊 Sea
Alberta	16,643	14,221	1,131	1,291	0
YOY* change	8.9%	9.8%	-17.1%	32.4%	0.0%
British Columbia	58,501	40,795	4,995	9,906	2,805
YOY change	-0.6%	3.6%	-1.7%	-3.6%	-31.8%
Saskatchewan	104	1	25	78	0
YOY change	48.6%	0.0%	78.6%	39.3%	0.0%
Manitoba	591	17	313	261	0
YOY change	-20.5%	112.5%	22.7%	-45.6%	0.0%
Ontario	65,213	47,917	6,457	10,822	17
YOY change	10.5%	0.8%	-4.7%	130.0%	21.4%
Quebec	27,769	22,064	2,004	3,389	312
YOY change	2.2%	12.6%	-24.9%	-30.9%	7,700.0%

Overnight Arrivals	Total (all modes)	✈️ Air direct from overseas	✈️ Air via US	🚗 Land	🌊 Sea
Nova Scotia	10,319	7,517	390	0	2,412
YOY change	-43.6%	-1.6%	75.7%	-100.0%	-76.7%
New Brunswick	2,583	0	9	2,143	431
YOY change	-10.3%	0.0%	-60.9%	589.1%	-83.1%
Newfoundland and Labrador	9,428	108	280	0	9,040
YOY change	128.4%	-85.0%	-17.4%	0.0%	194.8%
Nunavut	755	1	47	0	707
YOY change	65.6%	0.0%	17.5%	0.0%	70.4%
Yukon	5,019	1,551	24	3,444	0
YOY change	-15.8%	-10.7%	-66.7%	-17.1%	0.0%

YOY = year-over-year

Source: Statistics Canada, Frontier counts, custom tabulations

Note: The figures are preliminary estimates and are subject to change.

## 2019 Key Indicators

	Quarter 3	Year-to-date
Exchange Rate <sup>1</sup>	-3.5%	-2.9%
Air Capacity <sup>2</sup>	4.7%	4.7%
Consumer Confidence Index <sup>3</sup>	100.8	101.0

<sup>1</sup> Bank of Canada

<sup>2</sup> IATA - Diio SRS

Analysier

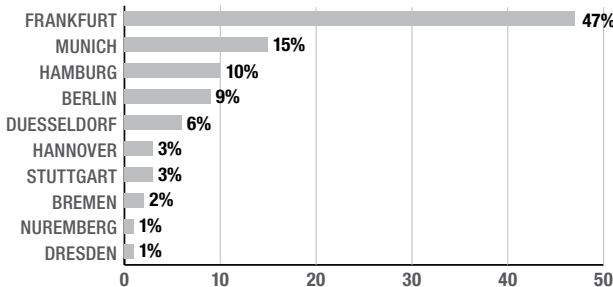
<sup>3</sup> OECD

Notes:

i. Air seat capacity is the variation in the total number of seats on direct commercial scheduled flights during the current quarter and YTD relative to the same periods in the previous year.

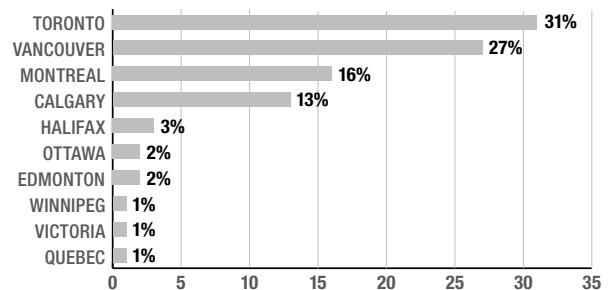
ii. The exchange rate variation is calculated on the average value of the Canadian Dollar during the current quarter and YTD relative to the same periods in the previous year.

## ✈️ Top Origin Cities - Q3 2019 (Air Travel)



Source: IATA, Global Agency Pro

## Top Destination Cities - Q3 2019 (Air Travel)

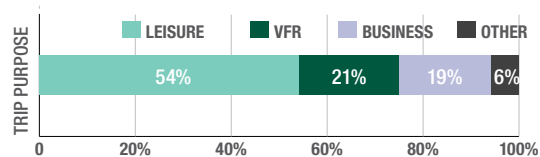


## 2018 Key Facts

Canada's market share of long-haul travel <sup>1</sup>	3.4%
Global outbound departures rank <sup>1</sup>	#1
Global tourism expenditures rank <sup>2</sup>	#3

Source: <sup>1</sup> Oxford Economics

<sup>2</sup> UNWTO, World Tourism Barometer



	Total	Leisure	VFR	Business
Average trip length (days)	18.3	15.3	18.1	9.5
Average spend per day	\$95.3	\$140.1	\$49.4	\$117.0
Average trip spend	\$1,747.5	\$2,144.1	\$892.9	\$1,112.0

Source: Statistics Canada, Visitor Travel Survey

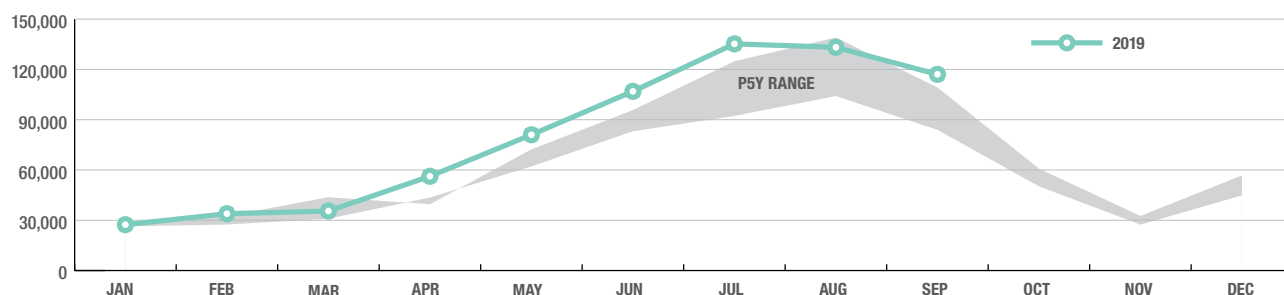
# UNITED KINGDOM

## Current Trends

Over Q3 2019, overnight arrivals from the United Kingdom numbered 385,500 visitors, 82.3% of whom travelled to Canada by air or cruise. Despite Brexit headwinds affecting consumer confidence and a weaker pound sterling (-4.5% against the CAD), air and cruise arrivals to Canada registered a 3.1% gain between July and September 2019. Total air arrivals edged up 0.5%, as air arrivals direct from overseas (+1.3%) were sufficient to offset declines in air arrivals via the United States (-5.2%). The growth in air arrivals direct from

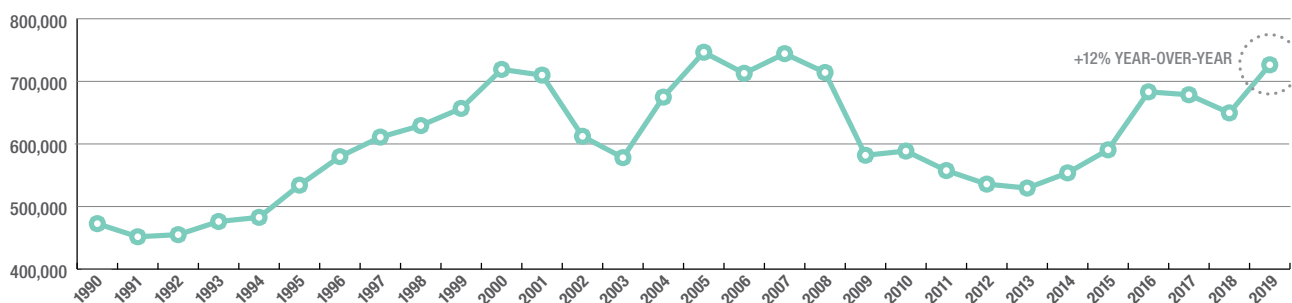
overseas was remarkable given contractions in scheduled air capacity between Canada and the United Kingdom (-7.6% or 57,000 fewer seats). The reduction in seats was partly due to the grounding of Boeing 737 Max 8 aircrafts, which forced Air Canada to put on hiatus services between St. John's and Halifax and the UK. Among the nine Canadian destinations with non-stop service to the UK, the WestJet service to Calgary was the only one with increased seat capacity in Q3 2019.

## Overnight Arrivals by Month: Past 5-Year Trend



Source: Statistics Canada, Frontier counts custom tabulations

## September Year-to-date Arrivals Long-Term Trend



Source: Statistics Canada, Frontier counts custom tabulations

## Overnight Arrivals by Mode

Overnight Arrivals	Q1	Year-over-year change	Q2	Year-over-year change	Q3	Year-over-year change	Q4	Year-over-year change
Total (all modes)	96,766	-12.0%	244,182	19.1%	385,500	15.2%		
✈️ Air direct from overseas	74,277	-18.1%	165,534	7.6%	248,512	1.3%		
✈️ Air via US	12,481	-12.2%	23,340	-3.9%	32,998	-5.2%		
🚗 Land	9,962	99.1%	38,347	211.6%	68,347	151.9%		
🌊 Sea	46	228.6%	16,961	15.9%	35,643	30.4%		

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

# UNITED KINGDOM

## Overnight Arrivals by Province - Q3 2019

Overnight Arrivals	Total (all modes)	✈️ Air direct from overseas	✈️ Air via US	🚗 Land	🌊 Sea
Alberta	37,903	32,665	2,313	2,925	0
YOY* change	13.3%	12.1%	-28.9%	176.5%	0.0%
British Columbia	106,337	66,002	8,634	15,416	16,285
YOY change	4.1%	0.5%	-5.7%	39.8%	0.1%
Saskatchewan	279	2	60	217	0
YOY change	220.7%	0.0%	150.0%	244.4%	0.0%
Manitoba	2,098	784	371	943	0
YOY change	52.8%	4.3%	96.3%	118.3%	0.0%
Ontario	181,901	121,399	17,129	43,320	53
YOY change	26.6%	4.8%	0.7%	301.6%	-27.4%
Quebec	27,801	20,594	3,594	3,053	560
YOY change	11.6%	15.6%	-17.2%	12.0%	1,597.0%

Overnight Arrivals	Total (all modes)	✈️ Air direct from overseas	✈️ Air via US	🚗 Land	🌊 Sea
Nova Scotia	10,556	6,981	494	0	3,081
YOY change	-36.4%	-40.5%	2.3%	-100.0%	-28.7%
New Brunswick	8,385	0	3	1,845	6,537
YOY change	107.2%	0.0%	50.0%	485.7%	75.3%
Newfoundland and Labrador	9,217	81	312	0	8,824
YOY change	23.0%	-98.2%	11.4%	0.0%	219.2%
Nunavut	347	0	44	0	303
YOY change	139.3%	-100.0%	175.0%	0.0%	142.4%
Yukon	676	4	44	628	0
YOY change	-6.4%	-63.6%	0.0%	-5.8%	0.0%

YOY = year-over-year

Source: Statistics Canada, Frontier counts, custom tabulations

Note: The figures are preliminary estimates and are subject to change.

## 2019 Key Indicators

	Quarter 3	Year-to-date
Exchange Rate <sup>1</sup>	-4.5%	-2.7%
Air Capacity <sup>2</sup>	-7.6%	-6.5%
Consumer Confidence Index <sup>3</sup>	99.9	99.8

<sup>1</sup> Bank of Canada

<sup>2</sup> IATA - Diio SRS

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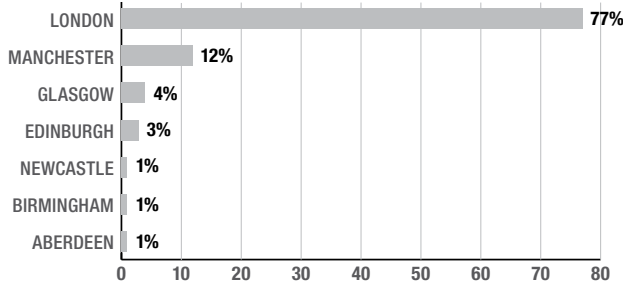
<sup>3</sup> OECD

Notes:

i. Air seat capacity is the variation in the total number of seats on direct commercial scheduled flights during the current quarter and YTD relative to the same periods in the previous year.

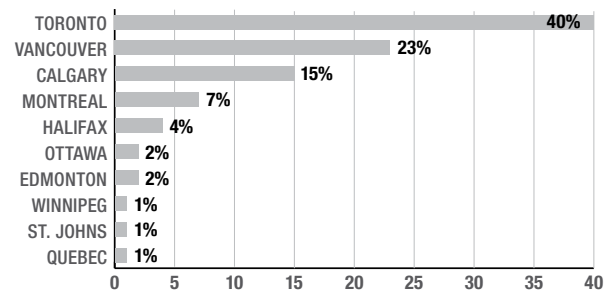
ii. The exchange rate variation is calculated on the average value of the Canadian Dollar during the current quarter and YTD relative to the same periods in the previous year.

## ✈️ Top Origin Cities - Q3 2019 (Air Travel)



Source: IATA, Global Agency Pro

## Top Destination Cities - Q3 2019 (Air Travel)

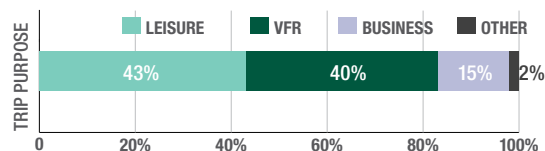


## 2018 Key Facts

Canada's market share of long-haul travel <sup>1</sup>	3.8%
Global outbound departures rank <sup>1</sup>	#4
Global tourism expenditures rank <sup>2</sup>	#4

Source: <sup>1</sup> Oxford Economics

<sup>2</sup> UNWTO, World Tourism Barometer



	Total	Leisure	VFR	Business
Average trip length (days)	13.2	11.1	14.1	8.2
Average spend per day	\$115.2	\$188.9	\$56.6	\$186.2
Average trip spend	\$1,516.9	\$2,091.9	\$799.4	\$1,533.4

Source: Statistics Canada, Visitor Travel Survey



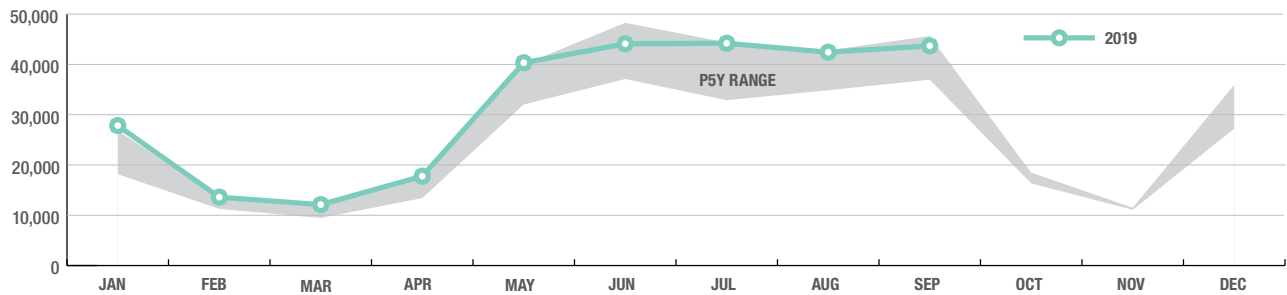
# AUSTRALIA

## Current Trends

Over Q3 2019, total overnight arrivals from Australian residents exceeded 130,300 visitors, 86.4% of whom travelled to Canada by air or cruise. With the weak purchasing power of the Australian dollar against the Canadian dollar (-5.3%) and a declining consumer confidence, air and cruise arrivals fell -2.6% year-over-year in Q3 2019. Cruise arrivals, which accounted for 17.0% of total overnight arrivals from Australia – the highest share among Destination Canada’s markets, declined by -10.7% in Q3 2019. Air arrivals also contracted

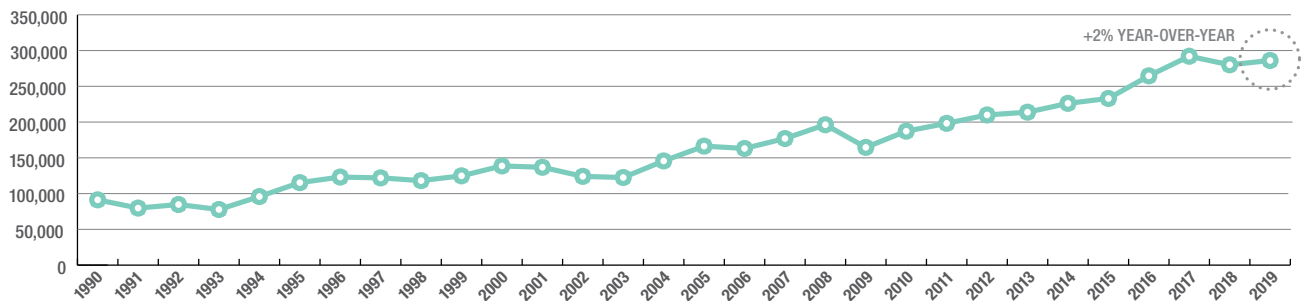
by a marginal -0.3% as fewer arrivals direct from overseas countered slight gains in air arrivals via the US. The contraction in air arrivals direct from overseas was matched by a contraction in scheduled air capacity (-1.0%), from Qantas Airlines withholding its July service between Sydney and Vancouver in 2019. In Q3 2019, Air Canada added to its total scheduled seat capacity (+5.8% or 3,675 seats) by increasing services between Melbourne and Vancouver from 40 flights 2018 to 52 flight in 2019.

## Overnight Arrivals by Month: Past 5-Year Trend



Source: Statistics Canada, Frontier counts custom tabulations

## September Year-to-date Arrivals Long-Term Trend



Source: Statistics Canada, Frontier counts custom tabulations

## Overnight Arrivals by Mode

Overnight Arrivals	Q1	Year-over-year change	Q2	Year-over-year change	Q3	Year-over-year change	Q4	Year-over-year change
Total (all modes)	53,557	3.2%	102,212	2.4%	130,327	1.5%		
✈️ Air direct from overseas	27,867	8.8%	41,468	5.3%	48,669	-1.0%		
✈️ Air via US	20,557	-6.0%	31,814	-3.0%	41,774	0.5%		
🚗 Land	5,130	15.6%	11,502	20.4%	17,729	38.5%		
🚢 Sea	3	0.0%	17,428	-3.4%	22,155	-10.7%		

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

# AUSTRALIA

## Overnight Arrivals by Province - Q3 2019

Overnight Arrivals	Total (all modes)	✈️ Air direct from overseas	✈️ Air via US	🚗 Land	🌊 Sea
Alberta	7,037	393	6,110	534	0
YOY* change	12.6%	-27.2%	17.3%	7.4%	0.0%
British Columbia	88,476	41,974	17,781	11,100	17,621
YOY change	1.3%	-0.5%	1.4%	57.4%	-14.3%
Saskatchewan	116	0	38	78	0
YOY change	38.1%	-100.0%	-15.6%	122.9%	0.0%
Manitoba	797	8	435	354	0
YOY change	99.2%	0.0%	88.3%	119.9%	0.0%
Ontario	22,701	5,129	13,309	4,243	20
YOY change	6.5%	0.6%	-6.7%	120.8%	-13.0%
Quebec	5,680	1,047	3,665	776	192
YOY change	-19.1%	-4.6%	-2.9%	-63.6%	1,376.9%

Overnight Arrivals	Total (all modes)	✈️ Air direct from overseas	✈️ Air via US	🚗 Land	🌊 Sea
Nova Scotia	1,330	111	300	0	919
YOY change	-34.9%	-37.6%	14.1%	-100.0%	-41.0%
New Brunswick	1,093	0	0	149	944
YOY change	53.1%	0.0%	0.0%	-18.1%	77.4%
Newfoundland and Labrador	2,193	2	17	0	2174
YOY change	12.5%	-97.1%	-34.6%	0.0%	17.2%
Nunavut	286	0	1	0	285
YOY change	5.9%	-100.0%	-50.0%	0.0%	7.5%
Yukon	618	5	118	495	0
YOY change	-37.0%	66.7%	-42.7%	-35.9%	0.0%

YOY = year-over-year

Source: Statistics Canada, Frontier counts, custom tabulations

Note: The figures are preliminary estimates and are subject to change.

## 2019 Key Indicators

	Quarter 3	Year-to-date
Exchange Rate <sup>1</sup>	-5.3%	-4.7%
Air Capacity <sup>2</sup>	-1.0%	8.9%
Consumer Confidence Index <sup>3</sup>	99.7	99.9

<sup>1</sup> Bank of Canada

<sup>2</sup> IATA - Diio SRS

Analysier

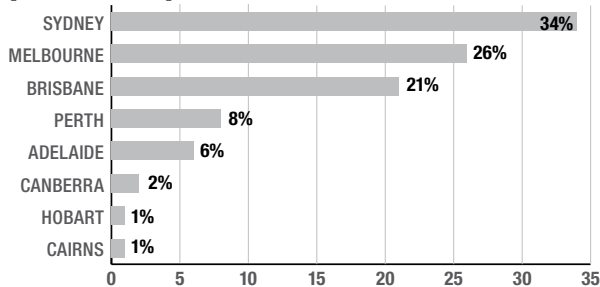
<sup>3</sup> OECD

Notes:

i. Air seat capacity is the variation in the total number of seats on direct commercial scheduled flights during the current quarter and YTD relative to the same periods in the previous year.

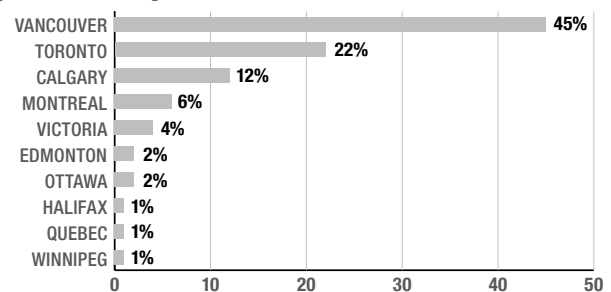
ii. The exchange rate variation is calculated on the average value of the Canadian Dollar during the current quarter and YTD relative to the same periods in the previous year.

## ✈️ Top Origin Cities - Q3 2019 (Air Travel)



Source: IATA, Global Agency Pro

## Top Destination Cities - Q3 2019 (Air Travel)

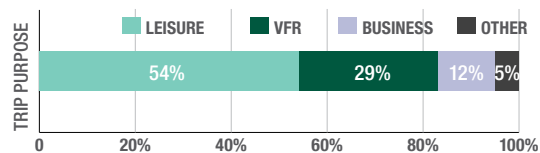


## 2018 Key Facts

Canada's market share of long-haul travel <sup>1</sup>	3.0%
Global outbound departures rank <sup>1</sup>	#22
Global tourism expenditures rank <sup>2</sup>	#6

Source: <sup>1</sup> Oxford Economics

<sup>2</sup> UNWTO, World Tourism Barometer



	Total	Leisure	VFR	Business
Average trip length (days)	20.5	13.1	24.2	22.7
Average spend per day	\$112.1	\$192.6	\$69.7	\$86.8
Average trip spend	\$2,302.5	\$2,527.1	\$1,685.6	\$1,970.6

Source: Statistics Canada, Visitor Travel Survey

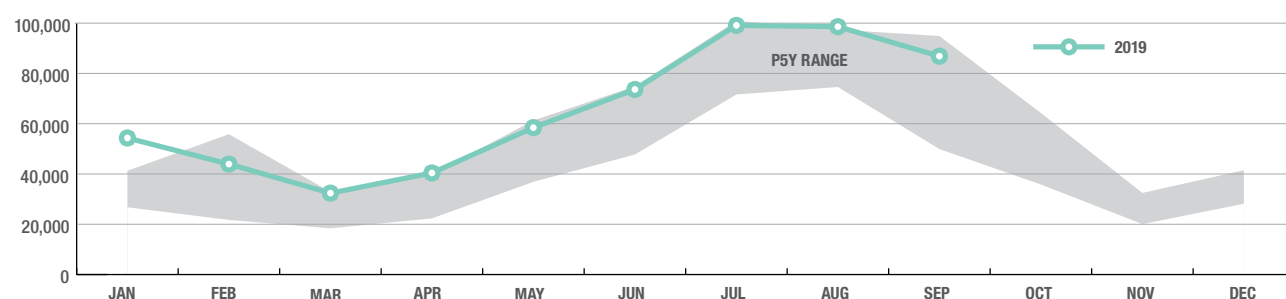
# CHINA

## Current Trends

Over Q3 2019, the deceleration in Chinese travel to North America was further entrenched as a result of increased consumer uncertainties amid a slowing Chinese economy and global trade frictions, together with increased travel avoidance to the United States. For the first time since 2015, China fell from its position as Canada's second largest long-haul market to third, behind France. In Q3 2019, overnight arrivals from China reached 284,600 visitors. During this period, air arrivals (-13.8%) declined both direct from overseas (-13.2%)

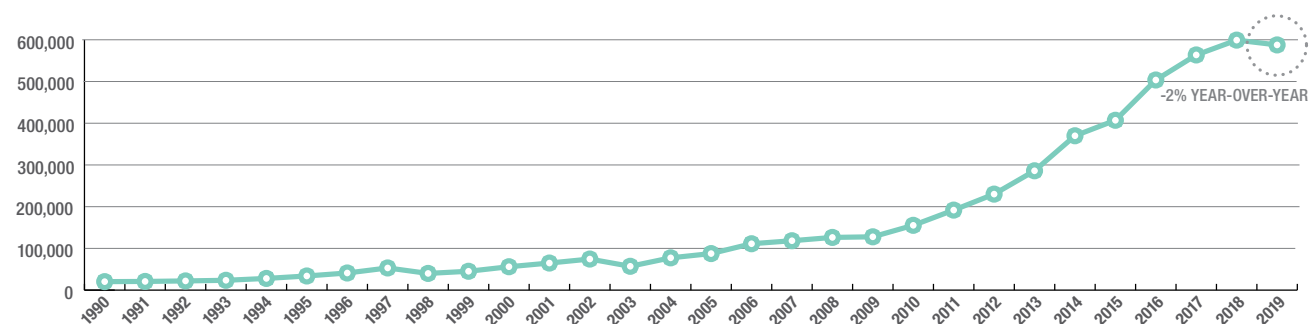
and via the United States (-18.8%). While direct air capacity in terms of seats available contracted year-over-year in Q3 2019 (-6.7%), most of this decline was from Air Canada's service (-15.1%), with the reduction from Chinese airlines being much less (-1.9%). The number of flights (-2.4%), however, remained relatively stable, an indicator of optimism for travel demand between the two countries, despite the current economic slowdown.

## Overnight Arrivals by Month: Past 5-Year Trend



Source: Statistics Canada, Frontier counts custom tabulations

## September Year-to-date Arrivals Long-Term Trend



Source: Statistics Canada, Frontier counts custom tabulations

## Overnight Arrivals by Mode

Overnight Arrivals	Q1	Year-over-year change	Q2	Year-over-year change	Q3	Year-over-year change	Q4	Year-over-year change
Total (all modes)	130,628	0.5%	172,463	-2.0%	284,580	-2.9%		
✈️ Air direct from overseas	101,859	-1.6%	121,540	-5.7%	193,033	-13.2%		
✈️ Air via US	13,198	-12.0%	15,760	-22.8%	22,960	-18.8%		
🚗 Land	15,489	35.7%	30,649	33.6%	59,602	72.4%		
🌊 Sea	82	0.0%	4,514	18.7%	8,985	11.6%		

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

# CHINA

## Overnight Arrivals by Province - Q3 2019

Overnight Arrivals	Total (all modes)	✈️ Air direct from overseas	✈️ Air via US	🚗 Land	🌊 Sea
Alberta	5,589	3,156	1,951	482	0
YOY* change	-12.8%	-25.8%	-2.1%	193.9%	0.0%
British Columbia	136,380	99,445	8,796	19,662	8,477
YOY change	-11.5%	-15.4%	-27.0%	15.5%	11.9%
Saskatchewan	48	2	14	32	0
YOY change	0.0%	0.0%	40.0%	-11.1%	0.0%
Manitoba	253	4	121	128	0
YOY change	19.9%	0.0%	7.1%	36.2%	0.0%
Ontario	121,122	74,945	9,631	36,542	4
YOY change	12.9%	-11.4%	-12.5%	211.1%	0.0%
Quebec	20,195	15,447	2,248	2,496	4
YOY change	-16.3%	-2.7%	-24.2%	-52.9%	300.0%

Overnight Arrivals	Total (all modes)	✈️ Air direct from overseas	✈️ Air via US	🚗 Land	🌊 Sea
Nova Scotia	400	33	193	0	174
YOY change	-15.3%	-34.0%	43.0%	-100.0%	-37.0%
New Brunswick	305	0	0	84	221
YOY change	91.8%	0.0%	0.0%	200.0%	68.7%
Newfoundland and Labrador	103	0	6	0	97
YOY change	49.3%	-100.0%	500.0%	0.0%	98.0%
Nunavut	8	0	0	0	8
YOY change	-52.9%	0.0%	0.0%	0.0%	-52.9%
Yukon	177	1	0	176	0
YOY change	2.9%	0.0%	0.0%	2.3%	0.0%

YOY = year-over-year

Source: Statistics Canada, Frontier counts, custom tabulations

Note: The figures are preliminary estimates and are subject to change.

## 2019 Key Indicators

	Quarter 3	Year-to-date
Exchange Rate <sup>1</sup>	-2.0%	-2.0%
Air Capacity <sup>2</sup>	-6.7%	-1.4%
Consumer Confidence Index <sup>3</sup>	104.2	104.4

<sup>1</sup> Bank of Canada

<sup>2</sup> IATA - Diio SRS

Analysier

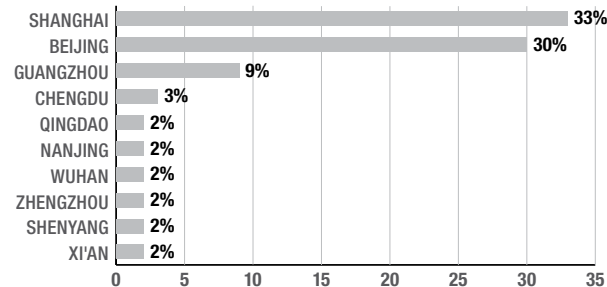
<sup>3</sup> OECD

Notes:

i. Air seat capacity is the variation in the total number of seats on direct commercial scheduled flights during the current quarter and YTD relative to the same periods in the previous year.

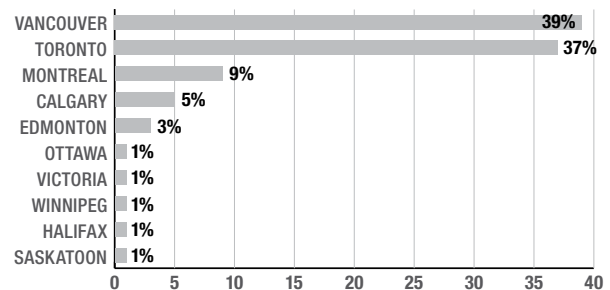
ii. The exchange rate variation is calculated on the average value of the Canadian Dollar during the current quarter and YTD relative to the same periods in the previous year.

## ✈️ Top Origin Cities - Q3 2019 (Air Travel)



Source: IATA, Global Agency Pro

## Top Destination Cities - Q3 2019 (Air Travel)

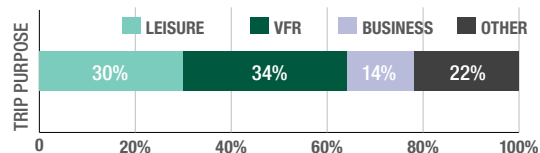


## 2018 Key Facts

Canada's market share of long-haul travel <sup>1</sup>	2.9%
Global outbound departures rank <sup>1</sup>	#3
Global tourism expenditures rank <sup>2</sup>	#1

Source: <sup>1</sup> Oxford Economics

<sup>2</sup> UNWTO, World Tourism Barometer



	Total	Leisure	VFR	Business
Average trip length (days)	40.4	16.4	40.4	13.7
Average spend per day	\$74.2	\$174.2	\$52.7	\$179.5
Average trip spend	\$2,999.9	\$2,858.8	\$2,127.4	\$2,456.7

Source: Statistics Canada, Visitor Travel Survey

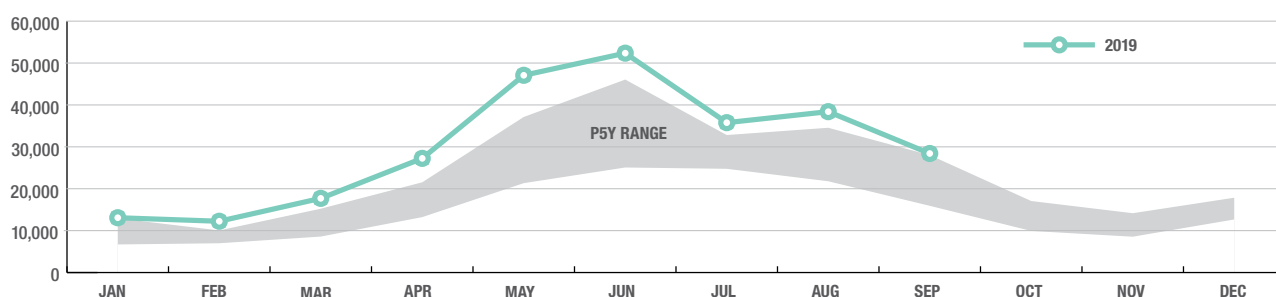
# INDIA

## Current Trends

Overnight arrivals from India in Q3 2019 numbered 102,600 visitors, 80.9% of whom entered Canada by air or sea. Air arrivals, which accounted for 93.9% of non-land arrivals, contracted by 3.0%, with fewer visitors flying into Canada direct from overseas (-2.0%) and via the United States (-7.8%). A steep reduction in non-stop air service between India and Canada forced Indian travellers to seek alternative routes for travel to Canada. Non-stop air capacity fell from 57,800 seats in Q3 2018 to 28,000 in Q3 2019 (-51.4%) as Air Canada's

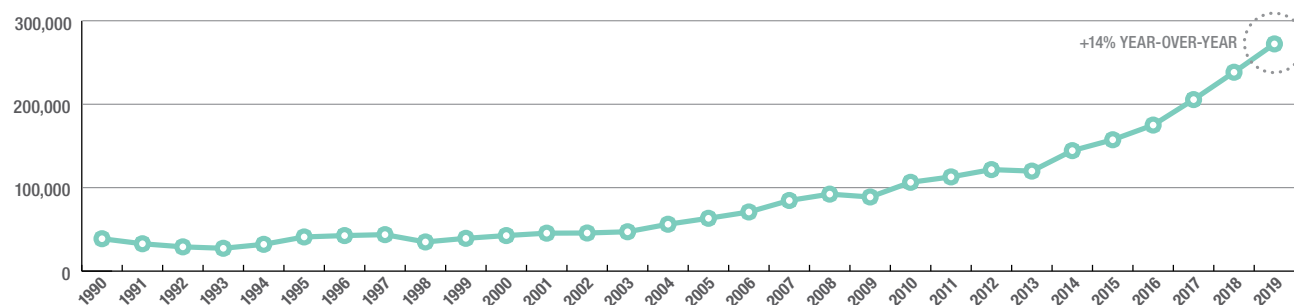
service from Delhi and Mumbai to Toronto were suspended, which was partly compensated with a substantial service increase on its Vancouver-Delhi route. Air India introduced a new non-stop service between Delhi and Toronto at the end of September 2019, which with Air Canada resuming service on its Mumbai-Toronto route in October 2019, bodes well to meet future demand for travel from India to Canada.

## Overnight Arrivals by Month: Past 5-Year Trend



Source: Statistics Canada, Frontier counts custom tabulations

## September Year-to-date Arrivals Long-Term Trend



Source: Statistics Canada, Frontier counts custom tabulations

## Overnight Arrivals by Mode

Overnight Arrivals	Q1	Year-over-year change	Q2	Year-over-year change	Q3	Year-over-year change	Q4	Year-over-year change
Total (all modes)	43,027	12.6%	126,678	21.0%	102,578	7.5%		
✈️ Air direct from overseas	33,820	7.2%	92,586	15.8%	65,260	-2.0%		
✈️ Air via US	4,331	10.9%	13,906	3.4%	12,646	-7.8%		
🚗 Land	4,848	79.4%	14,843	130.2%	19,640	111.4%		
🌊 Sea	28	-50.0%	5,343	9.7%	5,032	-12.9%		

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

# INDIA

## Overnight Arrivals by Province - Q3 2019

Overnight Arrivals	Total (all modes)	Air direct from overseas	Air via US	Land	Sea
Alberta	2,423	1,278	844	301	0
YOY* change	-42.2%	-55.4%	-24.0%	40.0%	0.0%
British Columbia	37,371	26,265	3,005	3,285	4,816
YOY change	15.4%	41.4%	-15.5%	-28.9%	-14.5%
Saskatchewan	55	3	22	30	0
YOY change	27.9%	-70.0%	-15.4%	328.6%	0.0%
Manitoba	241	10	108	123	0
YOY change	30.3%	900.0%	-0.9%	64.0%	0.0%
Ontario	58,157	35,099	7,999	15,059	0
YOY change	5.6%	-18.4%	-3.1%	294.1%	-100.0%
Quebec	3,889	2,564	564	737	24
YOY change	26.1%	32.3%	-2.6%	45.7%	-60.0%

Overnight Arrivals	Total (all modes)	Air direct from overseas	Air via US	Land	Sea
Nova Scotia	183	36	82	0	65
YOY change	-14.9%	-73.9%	148.5%	0.0%	47.7%
New Brunswick	142	0	0	72	70
YOY change	208.7%	0.0%	0.0%	227.3%	191.7%
Newfoundland and Labrador	82	5	20	0	57
YOY change	-42.3%	-94.4%	-54.5%	0.0%	612.5%
Nunavut	2	0	2	0	0
YOY change	-71.4%	0.0%	0.0%	0.0%	-100.0%
Yukon	33	0	0	33	0
YOY change	17.9%	0.0%	-100.0%	32.0%	0.0%

YOY = year-over-year

Source: Statistics Canada, Frontier counts, custom tabulations

Note: The figures are preliminary estimates and are subject to change.

## 2019 Key Indicators

	Quarter 3	Year-to-date
Exchange Rate <sup>1</sup>	0.7%	-1.2%
Air Capacity <sup>2</sup>	-68.2%	-33.3%

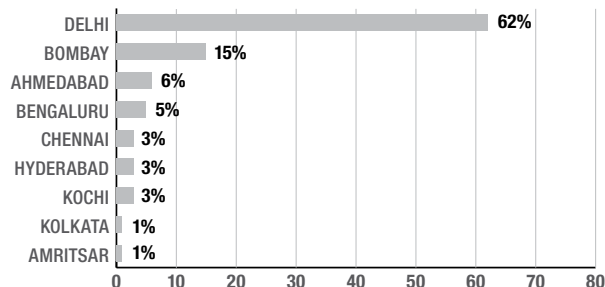
<sup>1</sup> Bank of Canada  
<sup>2</sup> IATA - Diiio SRS  
Analyser

Notes:

i. Air seat capacity is the variation in the total number of seats on direct commercial scheduled flights during the current quarter and YTD relative to the same periods in the previous year. For India, commercial scheduled flights with one stop are also included.

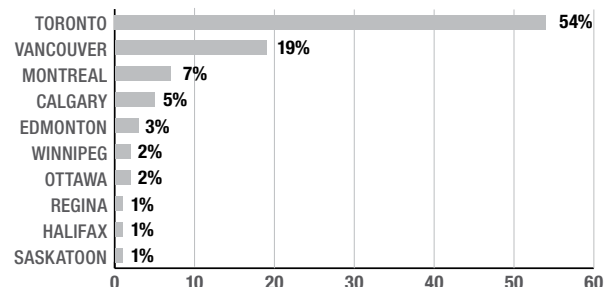
ii. The exchange rate variation is calculated on the average value of the Canadian Dollar during the current quarter and YTD relative to the same periods in the previous year.

## Top Origin Cities - Q3 2019 (Air Travel)



Source: IATA, Global Agency Pro

## Top Destination Cities - Q3 2019 (Air Travel)

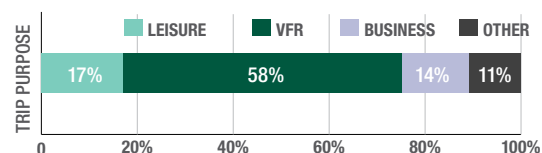


## 2018 Key Facts

Canada's market share of long-haul travel <sup>1</sup>	1.9%
Global outbound departures rank <sup>1</sup>	#20
Global tourism expenditures rank <sup>2</sup>	#16

Source: <sup>1</sup>Oxford Economics

<sup>2</sup>UNWTO, World Tourism Barometer



	Total	Leisure	VFR	Business
Average trip length (days)	48.9	12.8	56.6	28.5
Average spend per day	\$28.5	\$127.6	\$12.4	\$112.2
Average trip spend	\$1,392.2	\$1,633.4	\$702.9	\$3,192.4

Source: Statistics Canada, Visitor Travel Survey

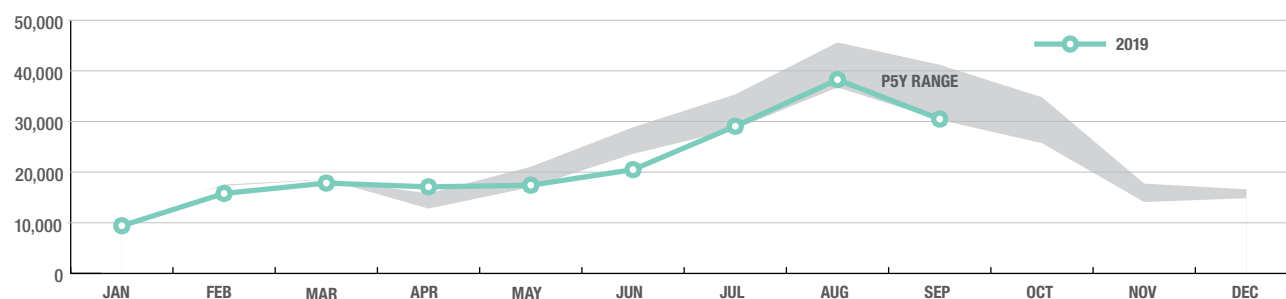
# JAPAN

## Current Trends

Overnight arrivals from Japan reached 97,800 visitors in Q3 2019, with 87.2% travelling to Canada by air or sea. The number of visitors travelling to Canada by these modes of entry contracted in Q3 2019 (-3.5%) as declines in air arrivals (-4.1%) overshadowed gains in cruise arrivals (+14.0%). The number of Japanese visitors entering Canada by air declined both direct from overseas (-3.6%) and via the United States (-6.0%). While the purchasing power of the Japanese yen strengthened against the Canadian dollar in Q3 2019, year-

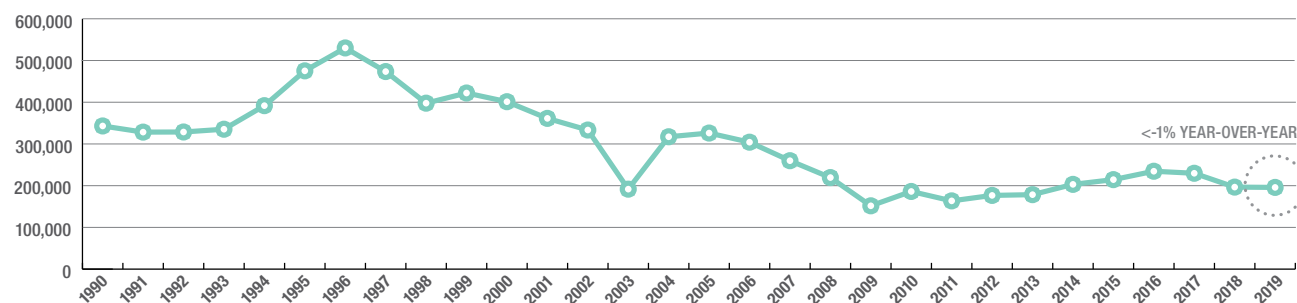
over-year, Japanese travel prospects were constrained by subdued consumer confidence. The lower demand for non-stop air service prompted Air Canada to reduce its air capacity offering from Nagoya and Osaka-Kansai to Vancouver by half (16,600 fewer seats). However, its service from Tokyo-Narita to Montreal was increased by 3,900 seats (+16.8%).

## Overnight Arrivals by Month: Past 5-Year Trend



Source: Statistics Canada, Frontier counts custom tabulations

## September Year-to-date Arrivals Long-Term Trend



Source: Statistics Canada, Frontier counts custom tabulations

## Overnight Arrivals by Mode

Overnight Arrivals	Q1	Year-over-year change	Q2	Year-over-year change	Q3	Year-over-year change	Q4	Year-over-year change
Total (all modes)	43,042	-9.6%	55,000	2.9%	97,808	2.4%		
✈️ Air direct from overseas	30,399	-12.8%	35,835	0.6%	66,488	-3.6%		
✈️ Air via US	7,816	-12.5%	10,999	5.2%	15,662	-6.0%		
🚗 Land	4,826	27.5%	5,997	12.4%	12,500	75.4%		
🚢 Sea	1	0.0%	2,169	8.1%	3,158	14.0%		

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

# JAPAN

## Overnight Arrivals by Province - Q3 2019

Overnight Arrivals	Total (all modes)	✈️ Air direct from overseas	✈️ Air via US	🚗 Land	🌊 Sea
Alberta	8,135	5,793	1,739	603	0
YOY* change	-0.6%	-10.0%	12.3%	200.0%	0.0%
British Columbia	55,216	39,273	4,599	8,363	2,981
YOY change	7.5%	-4.1%	3.9%	87.5%	92.0%
Saskatchewan	32	0	9	23	0
YOY change	23.1%	0.0%	-10.0%	43.8%	0.0%
Manitoba	241	0	128	113	0
YOY change	-2.4%	-100.0%	-22.9%	41.3%	0.0%
Ontario	25,074	15,845	6,932	2,297	0
YOY change	1.6%	-2.8%	1.9%	45.7%	-100.0%
Quebec	8,540	5,559	2,100	878	3
YOY change	-9.2%	7.1%	-41.4%	38.3%	0.0%

Overnight Arrivals	Total (all modes)	✈️ Air direct from overseas	✈️ Air via US	🚗 Land	🌊 Sea
Nova Scotia	220	18	155	0	47
YOY change	-83.1%	-84.6%	38.4%	-100.0%	-95.6%
New Brunswick	149	0	0	64	85
YOY change	-2.0%	0.0%	0.0%	88.2%	-28.0%
Newfoundland and Labrador	33	0	0	0	33
YOY change	-15.4%	-100.0%	-100.0%	0.0%	37.5%
Nunavut	9	0	0	0	9
YOY change	0.0%	-100.0%	0.0%	0.0%	50.0%
Yukon	159	0	0	159	0
YOY change	40.7%	0.0%	-100.0%	43.2%	0.0%

YOY = year-over-year

Source: Statistics Canada, Frontier counts, custom tabulations

Note: The figures are preliminary estimates and are subject to change.

## 2019 Key Indicators

	Quarter 3	Year-to-date
Exchange Rate <sup>1</sup>	5.0%	3.7%
Air Capacity <sup>2</sup>	-7.2%	0.2%
Consumer Confidence Index <sup>3</sup>	98.4	99.1

<sup>1</sup> Bank of Canada

<sup>2</sup> IATA - Diio SRS

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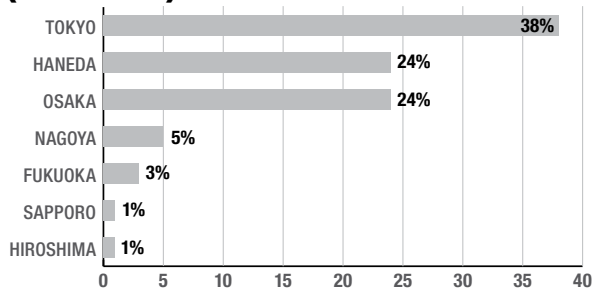
<sup>3</sup> OECD

Notes:

i. Air seat capacity is the variation in the total number of seats on direct commercial scheduled flights during the current quarter and YTD relative to the same periods in the previous year.

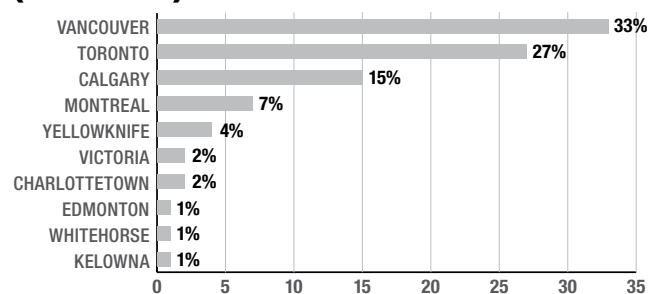
ii. The exchange rate variation is calculated on the average value of the Canadian Dollar during the current quarter and YTD relative to the same periods in the previous year.

## ✈️ Top Origin Cities - Q3 2019 (Air Travel)



Source: IATA, Global Agency Pro

## Top Destination Cities - Q3 2019 (Air Travel)

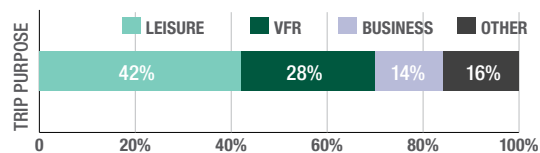


## 2018 Key Facts

Canada's market share of long-haul travel <sup>1</sup>	2.2%
Global outbound departures rank <sup>1</sup>	#14
Global tourism expenditures rank <sup>2</sup>	#17

Source: <sup>1</sup> Oxford Economics

<sup>2</sup> UNWTO, World Tourism Barometer



	Total	Leisure	VFR	Business
Average trip length (days)	17.6	9.3	11.5	9.9
Average spend per day	\$110.1	\$209.2	\$103.6	\$176.0
Average trip spend	\$1,934.7	\$1,942.7	\$1,187.7	\$1,748.8

Source: Statistics Canada, Visitor Travel Survey



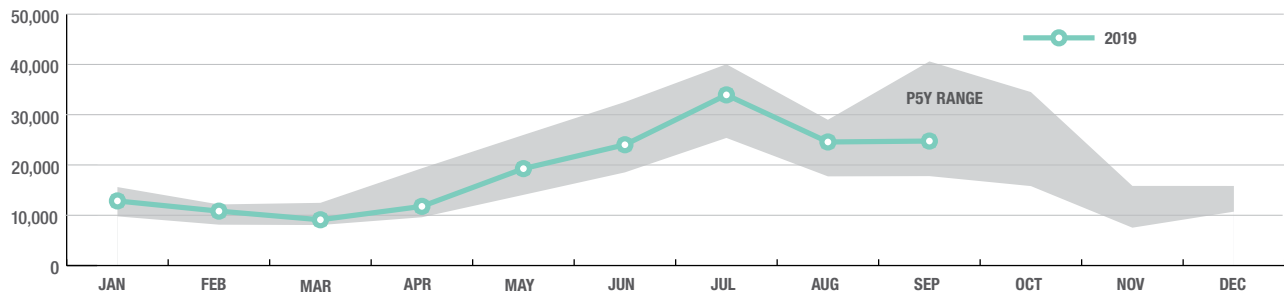
# SOUTH KOREA

## Current Trends

Over Q3 2019, overnight arrivals of South Koreans to Canada reached 83,300 visitors, 77.1% of whom travelled to Canada by air or sea. Despite subdued consumer confidence related to the lower purchasing power of the Korean Won (-5.1% vs the CAD) and uncertain economic prospects in the midst of ongoing trade disputes between the US and China on one side and Japan and South Korea on the other, overnight arrivals from Korea were refreshingly robust over the Q3 2019 period. Over 60,700 visitors entered Canada by air (+1.6%), including

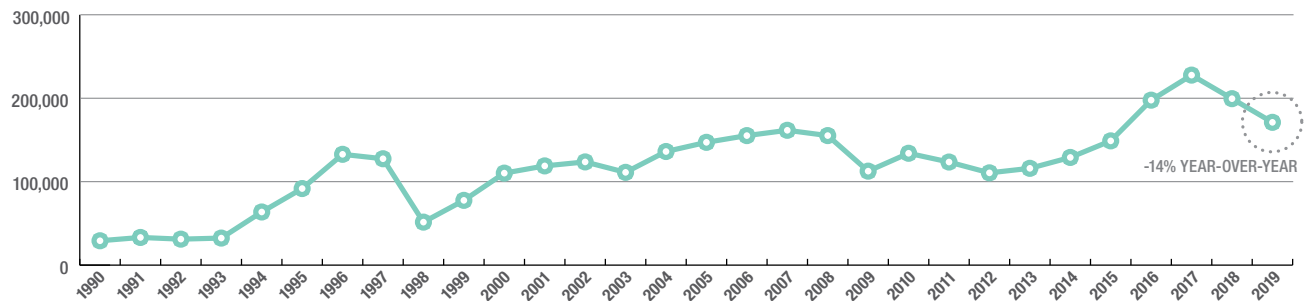
gains in arrivals direct from overseas (+0.7%) and via the United States (+6.2%). Relative to the same period in 2018, Korean Air maintained its service levels to both Vancouver and Toronto. Air Canada also maintained its service level to Vancouver, but increased its air capacity to Toronto (+33.2% or an additional 9,000 seats).

## Overnight Arrivals by Month: Past 5-Year Trend



Source: Statistics Canada, Frontier counts custom tabulations

## September Year-to-date Arrivals Long-Term Trend



Source: Statistics Canada, Frontier counts custom tabulations

## Overnight Arrivals by Mode

Overnight Arrivals	Q1	Year-over-year change	Q2	Year-over-year change	Q3	Year-over-year change	Q4	Year-over-year change
Total (all modes)	32,776	-15.5%	55,066	-23.0%	83,271	-6.6%		
✈️ Air direct from overseas	21,782	-0.0%	33,097	-3.3%	49,398	0.7%		
✈️ Air via US	5,467	7.1%	7,845	7.0%	11,342	6.2%		
🚗 Land	5,421	-54.4%	11,764	-57.6%	19,059	-27.5%		
🌊 Sea	106	0.0%	2,360	10.3%	3,472	10.5%		

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

# SOUTH KOREA

## Overnight Arrivals by Province - Q3 2019

Overnight Arrivals	Total (all modes)	✈️ Air direct from overseas	✈️ Air via US	🚗 Land	🌊 Sea
Alberta	2,452	433	1,803	216	0
YOY* change	22.0%	-9.2%	30.8%	39.4%	0.0%
British Columbia	44,733	27,624	3,690	10,021	3,398
YOY change	3.9%	-5.9%	-4.3%	47.9%	10.6%
Saskatchewan	26	0	4	22	0
YOY change	225.0%	0.0%	0.0%	450.0%	0.0%
Manitoba	171	2	98	71	0
YOY change	-10.9%	0.0%	180.0%	-54.8%	0.0%
Ontario	33,538	20,864	4,497	8,175	2
YOY change	-18.4%	10.5%	3.4%	-54.3%	0.0%
Quebec	2,151	473	1,189	486	3
YOY change	-17.2%	42.9%	16.7%	-61.0%	0.0%

Overnight Arrivals	Total (all modes)	✈️ Air direct from overseas	✈️ Air via US	🚗 Land	🌊 Sea
Nova Scotia	90	2	61	0	27
YOY change	-19.6%	-85.7%	45.2%	-100.0%	-50.9%
New Brunswick	74	0	0	33	41
YOY change	174.1%	0.0%	0.0%	135.7%	215.4%
Newfoundland and Labrador	1	0	0	0	1
YOY change	-87.5%	-100.0%	0.0%	0.0%	-50.0%
Yukon	35	0	0	35	0
YOY change	-27.1%	0.0%	-100.0%	-22.2%	0.0%

YOY = year-over-year

Source: Statistics Canada, Frontier counts, custom tabulations

Note: The figures are preliminary estimates and are subject to change.

## 2019 Key Indicators

	Quarter 3	Year-to-date
Exchange Rate <sup>1</sup>	-5.1%	-3.0%
Air Capacity <sup>2</sup>	8.6%	2.2%
Consumer Confidence Index <sup>3</sup>	99.0	99.4

<sup>1</sup> Bank of Canada

<sup>2</sup> IATA - Diio SRS

Analysier

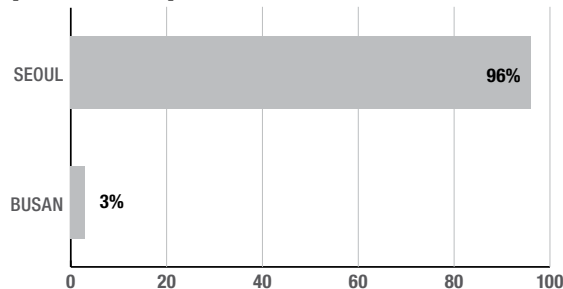
<sup>3</sup> OECD

Notes:

i. Air seat capacity is the variation in the total number of seats on direct commercial scheduled flights during the current quarter and YTD relative to the same periods in the previous year.

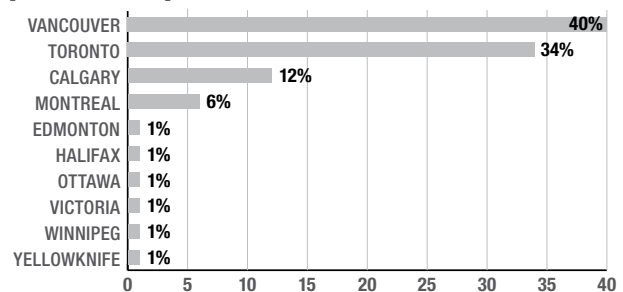
ii. The exchange rate variation is calculated on the average value of the Canadian Dollar during the current quarter and YTD relative to the same periods in the previous year.

## ✈️ Top Origin Cities - Q3 2019 (Air Travel)



Source: IATA, Global Agency Pro

## Top Destination Cities - Q3 2019 (Air Travel)

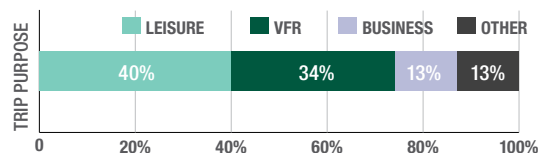


## 2018 Key Facts

Canada's market share of long-haul travel <sup>1</sup>	1.1%
Global outbound departures rank <sup>1</sup>	#9
Global tourism expenditures rank <sup>2</sup>	#9

Source: <sup>1</sup> Oxford Economics

<sup>2</sup> UNWTO, World Tourism Barometer



	Total	Leisure	VFR	Business
Average trip length (days)	21.0	6.1	21.9	6.7
Average spend per day	\$82.5	\$245.1	\$59.9	\$235.4
Average trip spend	\$1,731.6	\$1,492.9	\$1,313.8	\$1,586.8

Source: Statistics Canada, Visitor Travel Survey

# Accommodation

## Hotel Performance Indicators by Province

	Occupancy Rates				Average Daily Rate (ADR)				Revenue Per Available Room (RevPAR)			
	Sept. 2019	YOY <sup>^</sup> Change	Year-to-date	YOY <sup>^</sup> Change	Sept. 2019	YOY Change	Year-to-date	YOY Change	Sept. 2019	YOY Change	Year-to-date	YOY Change
Alberta <sup>1</sup>	58.5%	-3.3	56.1%	-1.2	\$131.49	-1.0%	\$130.23	-1.2%	\$76.98	-6.3%	\$73.03	-3.3%
British Columbia	80.2%	-0.8	73.7%	0.3	\$210.21	4.5%	\$199.80	2.3%	\$168.48	3.5%	\$147.31	2.8%
Saskatchewan	56.3%	-4.7	56.0%	-1.2	\$117.26	-0.7%	\$118.30	0.6%	\$66.03	-8.4%	\$66.27	-1.5%
Manitoba	72.2%	-4.5	68.1%	-1.3	\$127.81	1.6%	\$125.14	-0.5%	\$92.26	-4.4%	\$85.23	-2.3%
Ontario	78.3%	-3.2	70.2%	-1.4	\$177.50	-2.0%	\$164.79	0.7%	\$138.97	-5.9%	\$115.64	-1.2%
Quebec	78.5%	-0.5	69.9%	-0.3	\$190.06	2.7%	\$177.25	1.9%	\$149.28	2.1%	\$123.83	1.5%
New Brunswick	69.4%	-3.5	62.3%	-0.8	\$131.48	1.1%	\$130.30	2.8%	\$91.25	-3.8%	\$81.15	1.4%
Nova Scotia	84.1%	0.2	68.7%	-0.2	\$164.22	-1.5%	\$148.59	-1.7%	\$138.16	-1.3%	\$102.14	-2.0%
Newfoundland and Labrador	71.7%	-0.9	57.3%	1.9	\$144.63	-5.7%	\$134.31	-6.8%	\$103.67	-6.9%	\$76.91	-3.7%
Prince Edward Island	78.1%	-3.8	64.8%	2.1	\$177.76	5.0%	\$161.08	1.6%	\$138.87	0.1%	\$104.33	5.1%
Northwest Territories	86.6%	-3.4	61.9%	-9.7	\$158.97	1.1%	\$147.79	-1.2%	\$137.72	-2.7%	\$91.43	-14.6%
Yukon	74.8%	-3.9	67.3%	-1.6	\$164.03	4.3%	\$154.03	5.1%	\$122.74	-0.9%	\$103.73	2.7%
<b>Canada</b>	<b>73.7%</b>	<b>-2.7</b>	<b>67.0%</b>	<b>-0.9</b>	<b>\$177.38</b>	<b>0.5%</b>	<b>\$166.63</b>	<b>0.9%</b>	<b>\$130.71</b>	<b>-3.0%</b>	<b>\$111.68</b>	<b>-0.4%</b>

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

<sup>^</sup> Percentage points.

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

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- The national average occupancy rate sat at 73.7% in September 2019. Continuing the trend observed throughout Q3 2019 and most of this year, this fell below the same month a year ago (down 2.7 percentage points). This brought the year-to-date national average occupancy rate for the first three quarters of 2019 to 67.0%, a marginal -0.9 percentage points below the average rate in the first three quarters of 2018.
- Over the first three quarters of 2019, the highest occupancy rates were recorded in British Columbia, Ontario, and Quebec. The year-over-year decline in average occupancy rate was seen to varying degrees across most provinces and territories, with only Prince Edward Island, Newfoundland and Labrador, and British Columbia recording higher rates compared to the first three quarters of 2018.
- The national average daily rate (ADR) continued to climb slowly ahead of 2018 levels, currently sitting at \$166.63 (+0.9%) for the first three quarters of 2019. British Columbia, Quebec, and Ontario reported the highest ADR year-to-date. Just over half of the provinces and territories reported year-over-year increases in ADR over this period, led by Yukon, New Brunswick, and British Columbia.
- From January to September 2019, the national revenue per available room (RevPar) fell marginally year-over-year (\$111.68, -0.4%). British Columbia, Quebec and Ontario reported the highest RevPar year-to-date. Just under half of the provinces and territories recorded year-over-year gains on this measure, led by Prince Edward Island, British Columbia and Yukon.

# Accommodation

## Hotel Performance Indicators by Property Type

	Occupancy Rates				Average Daily Rate (ADR)			
	Sept. 2019	YOY^ Change	Year-to-date	YOY^ Change	Sept. 2019	YOY Change	Year-to-date	YOY Change
<b>Property Size</b>								
Under 50 rooms	63.4%	-2.5	56.5%	1.1	\$126.84	-2.4%	\$124.68	1.4%
50-75 rooms	67.9%	-3.6	61.6%	-0.7	\$129.48	-0.3%	\$126.10	0.8%
76-125 rooms	71.7%	-2.5	65.3%	-1.2	\$142.39	-0.1%	\$138.19	0.7%
126-200 rooms	73.5%	-2.3	67.2%	-0.7	\$158.64	-0.1%	\$151.66	0.1%
201-500 rooms	76.9%	-2.9	70.1%	-0.9	\$214.64	1.6%	\$197.69	1.3%
Over 500 rooms	83.8%	-2.5	74.9%	-1.3	\$291.96	1.0%	\$258.29	2.4%
<b>Total</b>	<b>73.7%</b>	<b>-2.7</b>	<b>67.0%</b>	<b>-0.9</b>	<b>\$177.38</b>	<b>0.5%</b>	<b>\$166.63</b>	<b>0.9%</b>
<b>Property Type</b>								
Limited Service	69.1%	-2.8	62.7%	-0.6	\$128.81	0.2%	\$125.54	1.0%
Full Service	76.5%	-2.5	69.2%	-1.2	\$197.99	1.1%	\$181.23	1.1%
Suite Hotel	80.0%	-3.0	74.3%	-1	\$178.97	-0.8%	\$170.79	-0.2%
Resort	70.7%	-3.3	66.9%	0	\$283.50	1.8%	\$274.42	2.9%
<b>Total</b>	<b>73.7%</b>	<b>-2.7</b>	<b>67.0%</b>	<b>-0.9</b>	<b>\$177.38</b>	<b>0.5%</b>	<b>\$166.63</b>	<b>0.9%</b>
<b>Price Level</b>								
Budget	70.6%	-2.1	62.0%	-0.3	\$116.42	0.4%	\$112.55	1.6%
Mid-Price	73.1%	-3.2	67.2%	-1.2	\$162.53	-0.1%	\$154.68	0.8%
Upscale	80.3%	-1.2	72.8%	-0.4	\$306.53	1.7%	\$276.39	0.9%
<b>Total</b>	<b>73.7%</b>	<b>-2.7</b>	<b>67.0%</b>	<b>-0.9</b>	<b>\$177.38</b>	<b>0.5%</b>	<b>\$166.63</b>	<b>0.9%</b>

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

- Over the first three quarters of 2019, occupancy rates increased by property size, ranging from 56.5% for properties with under 50 rooms to 74.9% for properties with over 500 rooms. The year-over-year decline in the national average occupancy rate was recorded across all properties sizes, with the exception of the smallest properties (<50 rooms).
- The downward trend in average occupancy rate over the first three quarters of 2019 was also reported across accommodation price levels and property types, with the exception of resort properties, which were on par with the same period in 2018.
- ADR also increased by property size, ranging from \$124.68 to \$258.29 year-to-date. While ADR increased year-over-year across all property sizes, the biggest increases were reported from properties with over 500 rooms (+2.4%) and those with under 50 rooms (+1.4%).
- By property type, resort properties continued to report the highest ADR over this period (\$274.42), as well as the biggest year-over-year increase (+2.9%).
- Accommodations at all price levels recorded a decline in average occupancy rate, while also recording an increase in ADR year-to-date.