

National Tourism Indicators

March to June (Q2) and January to June (H1) 2018



National Tourism Indicators highlights including the second quarters of 2018 (January to June 2018) as released by Statistics Canada on September 27, 2018.

Tourism activities in Canada:
CAD 43.8 Billion
+5.7%

Total tourism expenditures in Canada rose 5.7 % over the first half of 2018 backed by vibrant domestic (+6.4%) and international (+3.2%) tourism spend contributions.

The largest spending sources emerged from passenger air transport (\$10.5, +9.8%), food and beverage services (\$7.3B, +5.0%), accommodation (\$6.1B, +3.5%) and vehicle fuel (\$4.5B, +11.9%).

Year-over-year, inflation accelerated over the second quarter of 2018 and accounted for 2.9% of overall gains YTD June 2018. Inflation most impacted vehicle fuel, resulting in a real spending (-2%) drop for this tourism commodity over the first half of 2018.

Tourism Export:
CAD 9.3 Billion
+3.2%

Following spending levels over the first quarter (+8.5%) fueled by tourist arrivals levels (+6.8%) heightened by travels over the Lunar New Year in Asia in February and Easter in March, international tourism spending over the second quarter (0%) remained on par year-over-year despite ebbing arrivals levels (-0.9%).

Over the first half of 2018, a 1.7% rise in tourist arrivals led to a 3.2% overall increase tourism export revenues.

The largest sources of export revenues were accommodation (\$2.4B, +3.0%), passenger air transport (\$2.1B, +2.5%), food and beverage services ((\$1.6B, +4.9%) and recreation & entertainment (\$855M, +4.3%). Other non-tourism commodities (souvenir, groceries, clothing, etc.) represented \$1.4B (+0.8%).

Tourism Employment:
733,800 jobs
+1.4%

Frontline jobs required to service tourism demand over the first half of 2018 averaged 733,800 jobs across Canada, up 1.4% year-over-year.

The largest sources of employment directly attributable to tourism were with the food and beverage services (236k, +1.7%), in non-tourism industries (154K, +3.5%), accommodation (150K, +2.1%) and recreation and entertainment (69K, +0.7%).

Tourism's share of Canada's GDP
1.9%

Over the first half of 2018, tourism activities added \$18.7B in value added to the Canadian economy an increase of 6.2%, and which contributed to 1.9% to the Canadian Gross Domestic Product (GDP) over the first half of 2017.

Table 1. National Tourism Indicators for the first and second quarters (q), first half (h) of 2018.

| | 2018q1 | y/y | 2018q2 | y/y | 2018h1 | y/y |
|--|--------|------|--------|------|---------|------|
| Total Tourism Demand (\$million) | 19,395 | 5.5% | 24,446 | 5.8% | 43,841 | 5.7% |
| Domestic Demand (\$million) | 15,690 | 4.8% | 18,803 | 7.7% | 34,493 | 6.4% |
| Tourism Export (\$million) | 3,705 | 8.5% | 5,643 | 0.0% | 9,348 | 3.2% |
| Supply (\$million) | 53,326 | 5.6% | 60,348 | 6.9% | 113,674 | 6.3% |
| GDP (\$million) | 8,227 | 6.3% | 10,493 | 6.1% | 18,720 | 6.2% |
| Tourism GDP Share ¹ | 1.7% | 0.03 | 2.1% | 0.04 | 1.9% | 0.04 |
| Employment (thousand jobs) | 721.8 | 1.4% | 745.7 | 1.3% | 733.8 | 1.4% |
| Tourism Implicit Price Index 100=2007q3) | 116.0 | 2.5% | 117.0 | 3.4% | 116.5 | 2.9% |

¹ Year-over-year change expressed as Percentage-Points