



Outbound Canada

May 2016

A monthly report on Canadian outbound travel

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Executive Summary

Total Canadian Outbound Travel

Canadians made more than 8.1 million overnight trips to the U.S. and other destinations during the first quarter of 2016. Of this total, an estimated 6.7 million trips were for leisure purposes. Overseas leisure trips continue to post strong monthly gains (+6.1%), while leisure travel to the United States has declined by more than half a million trips (-13.3%) so far this year. Overseas travel now accounts for half of all outbound leisure trips.

The first five months of the winter season saw overseas leisure trips grow by 6.5 per cent, while winter leisure travel to the United States has declined by -13.1 per cent.

Canadian Travel to the United States

In the first quarter of 2016, Canadians made almost 3.5 million overnight leisure trips to the U.S. So far this year, overnight auto travel has declined -17.1 per cent. Taking the exchange rate into account, the average daily hotel rate increased 14.2 per cent to \$165.65 CAD.

Direct arrivals from Canada to select Florida destinations surpassed 737 thousand passengers in the first quarter of 2016. While this represents a 6.2 per cent increase in air arrivals, the volume of trips by other modes have decreased by an estimated -4.6 per cent so far this year. Direct passenger arrivals in Hawaii increased by more than 6 thousand passengers during the period, but the total number of arrivals has declined by -12.2 per cent. The first quarter also saw an -8.7 per cent drop in direct arrivals in Phoenix and -5.3 per cent fewer direct arrivals in Las Vegas. On the other hand, direct arrivals in New Orleans have grown 6.3 per cent so far this year, while an increase in capacity resulted in a slight (1.0%) increase in Canadian arrivals at LAX.

Canadian Travel to Europe

Canadians made almost 583 thousand visits to Europe in the first quarter of 2016 (based on estimates from 24 countries). This represents an increase of 5.4 per cent compared to 2015. So far this winter, the region has experienced solid growth of 3.6 per cent.

Canadian Travel to Asia and the South Pacific

Canadians made more than 760 thousand visits to the Asia/Pacific region in the first quarter of 2016, a 6.7 per cent increase compared to the previous year. Sri Lanka and Japan saw the largest percentage increase in arrivals, while Malaysia experienced the largest decline. Due primarily to the exchange rate, the average room rate in Canadian dollars increased 5.4 per cent in Singapore, 1.6 per cent in Thailand, and 0.2 per cent in Hong Kong.

Canadian Travel to the Caribbean and Mexico

While the volume of travel to the Caribbean and Mexico in the first quarter of 2016 was similar to that seen one year ago, the distribution of visits is quite different. Compared to 2015, only Mexico, Cuba, and the Dominican Republic experienced a significant increase in the volume of visitors. Canadian arrivals in the Dominican Republic increased 2.6 per cent, while Cuba and Mexico saw growth of 1.1 per cent and 0.6 per cent, respectively. Even with increased visitation to these popular destinations, overall growth for the region faltered slightly, dropping -0.8 per cent.

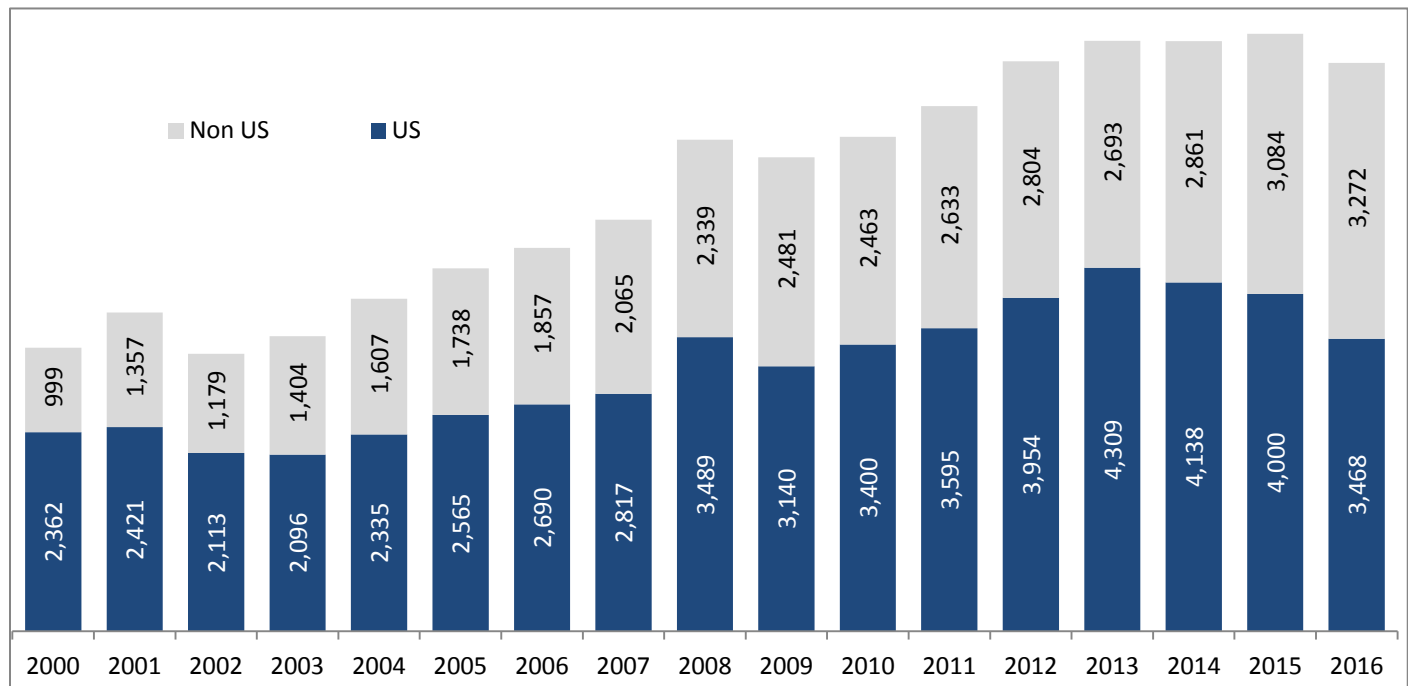
Consumer Confidence

The national consumer confidence rating was 101.8 points in May, an increase of 7.3 points compared to April. In addition to this uptick in consumer confidence, a one-in-three Canadians indicated May was a good time to make a major purchase. At 30.4 per cent, the national rating is the highest it has been so far in 2016.

Outbound Canada

Canadians made more than 8.1 million overnight trips to the U.S. and other destinations during the first quarter of 2016. Of this total, an estimated 6.7 million trips were for leisure purposes. Overseas leisure trips continue to post strong monthly gains (+6.1%), while leisure travel to the United States has declined by more than half a million trips (-13.3%) so far this year. Overseas travel now accounts for half of all outbound leisure trips.

Canadian Outbound Leisure Travel (000s of trips)
(January-March each year)



Source: CBoC estimates of leisure trips from total outbound trips as reported by Statistics Canada.

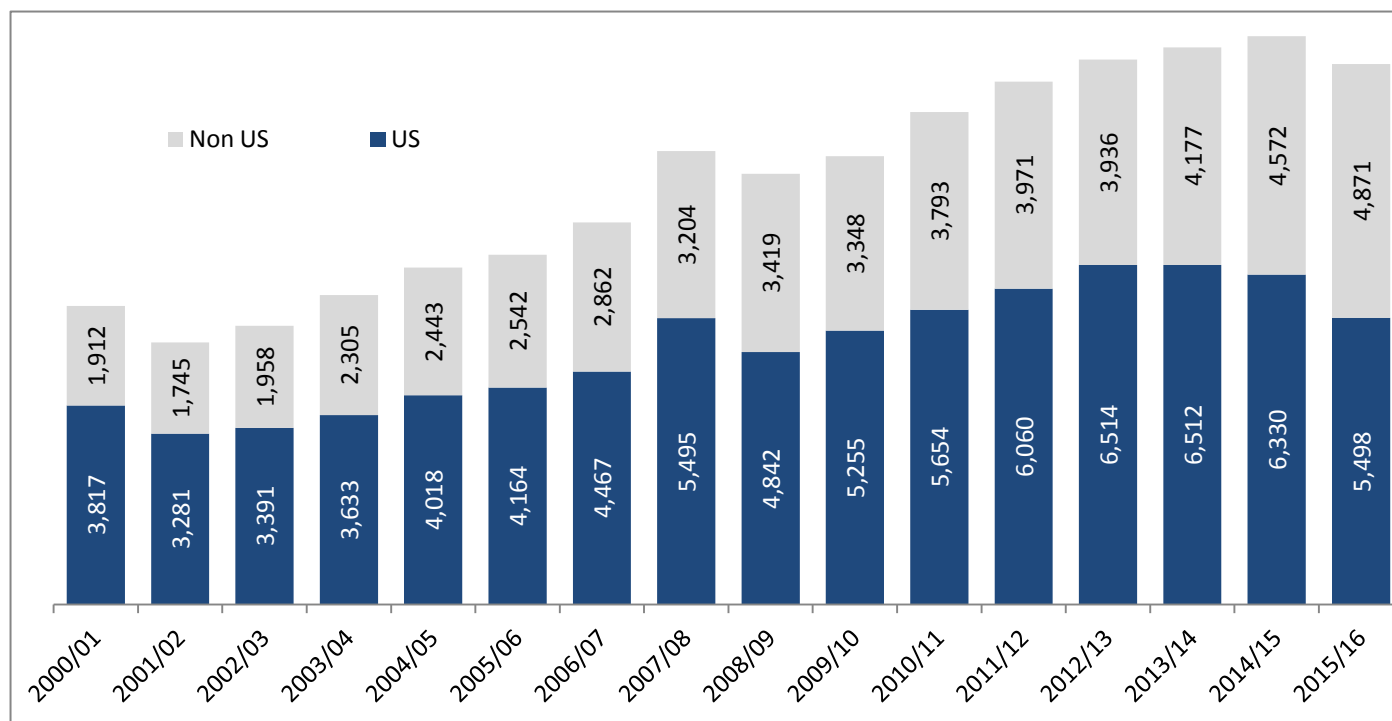
Compared to last year, Canadians made -7.8 per cent fewer outbound trips (for all purposes) in the first quarter of 2016. The number of trips to the U.S. continued to fall, and the volume of overseas trips decreased from all regions except Ontario. The overall volume of non-auto travel decreased -3.4 per cent, but overnight auto travel to the U.S. decreased by -17.1 per cent. Residents from Ontario made 6.3 per cent more trips to destinations other than the U.S. and now account for half of all overseas travel.

TRIPS FOR ALL PURPOSES	US Auto Trips	% Change	US Non-Auto Trips	% Change	Non-US Trips	% Change	Total Outbound	% Change
Atlantic Canada	22,460	-31.2%	21,192	-0.9%	39,946	-10.9%	83,598	-15.4%
Québec	126,807	-14.6%	146,878	-4.9%	295,211	-0.6%	568,896	-5.1%
Ontario	459,381	-18.0%	394,391	-14.9%	652,213	6.3%	1,505,985	-8.0%
Manitoba	34,736	-14.0%	17,995	-14.0%	22,862	-11.5%	75,593	-13.3%
Saskatchewan	10,783	-8.9%	12,239	2.1%	12,933	-24.3%	35,955	-12.1%
Alberta	33,886	-10.1%	133,076	-10.2%	109,725	-8.0%	276,687	-9.3%
BC	214,700	-16.8%	168,819	1.5%	194,740	-1.6%	578,259	-7.0%
Yukon	892	-16.8%	90	--	731	--	1,713	53.9%
Total	903,645	-17.1%	894,680	-9.3%	1,328,361	1.0%	3,126,686	-7.8%

Winter 2015-16

From November 2015 through March 2016, Canadians made almost 10.4 million overnight leisure trips to the U.S. and other destinations. The first five months of the winter season saw overseas leisure trips grow by 6.5 per cent, while winter leisure travel to the United States has declined by -13.1 per cent. During the period, the Canadian dollar fell to an average of \$0.73.

Outbound Leisure Travel by Destination Winter Season, (000s of trips) (November-March each year)



Source: CBoC estimates of leisure trips from total outbound trips as reported by Statistics Canada.

Canadians made almost 1.9 million trips to the Caribbean during the first five months of the winter 2015-16 season, a -2.0 per cent drop compared to last winter, but more than the three winters prior. Two-thirds (66.0%) of winter trips to the region were to Cuba and the Dominican Republic. During the period, visits to the Dominican Republic increased 3.6 per cent, making it one of the best performing destinations in the Caribbean during the season. With visitation surpassing 1.1 million, Mexico has also performed fairly well this winter.

So far this winter, visitation to European countries has experienced 3.6 per cent growth as the volume of trips surpassed one million for the first time ever. With over 1.2 million arrivals, travel to the Asia/Pacific region has also posted strong growth (5.9%) compared to the previous winter period.

Canadian Arrivals (for all purposes) by Region, Winter Season (November-March each year)

Region	2012-13	2013-14	2014-15	2015-16	% change
Asia-Pacific	1,125,306	1,156,496	1,192,739	1,262,981	5.9%
Europe	925,464	860,155	973,777	1,008,471	3.6%
Caribbean	1,746,304	1,825,335	1,936,985	1,898,629	-2.0%
Mexico	1,051,890	1,121,648	1,146,323	1,154,129	0.7%

Source: various government statistical agencies and tourism associations for destinations with monthly data available.

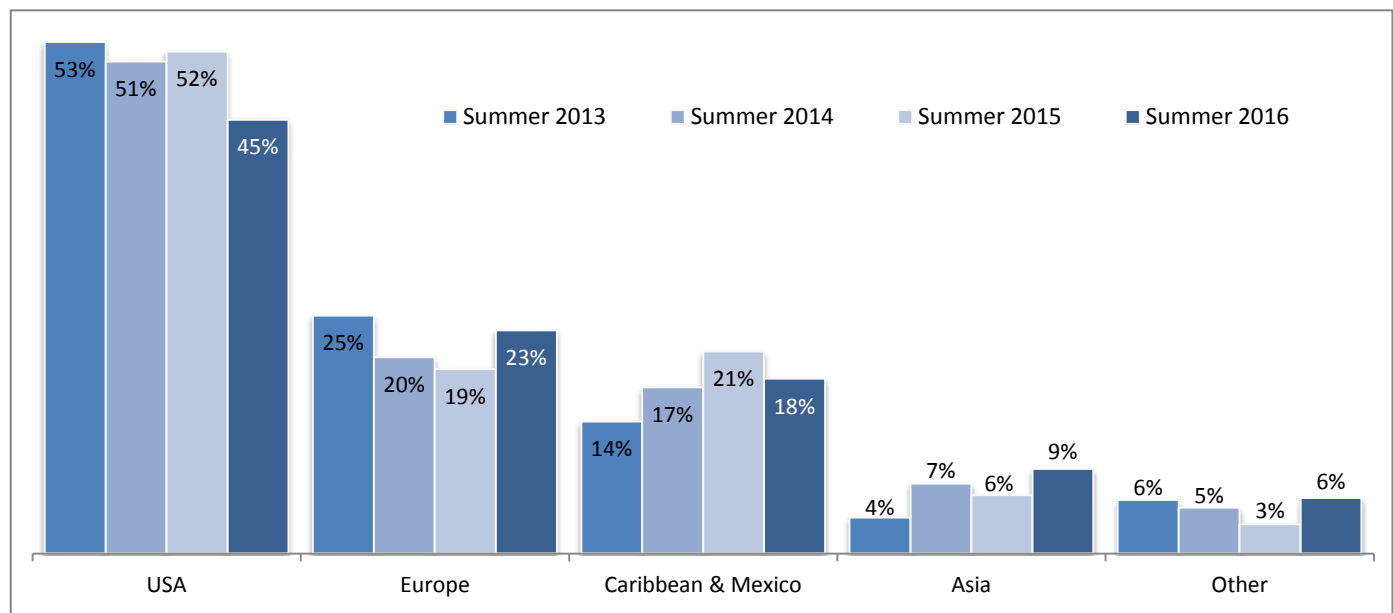
Summer 2016 Outlook

Even though the country's economy isn't as strong as it was in recent years, Canadian summer travel intentions remain strong with three-quarters of Canadians planning to take a vacation trip between May and October 2016. While overall intentions are up slightly (1.5%), a smaller proportion of travellers plan to travel outside the country on their longest trip this summer. About one-in-four (38.6%) Canadians planning a leisure trip intend to travel outside the country.

Given economic weakness and a low dollar, it is not surprising that higher outbound travel intentions are expected for domestic trips this summer. Contrary to the past few years, less than half of all outbound leisure travellers intend to visit the U.S. on their longest trip (45%). The dollar seems to be affecting trip volumes to the Caribbean as well—a smaller proportion of outbound travellers plan to visit the region this summer (-3.1%). That said, intentions to visit Mexico are about the same as last year (+0.4%) suggesting a stable selling climate for mass destination sun-seeking Canadians.

After a strong uptick in visits of late, travel intentions for European and Asia-Pacific destinations do not appear to be slowing. Intentions to visit Europe grew to almost one-quarter of outbound summer travellers (23%), while the proportion planning to travel to the Asia-Pacific region reached 8.7 per cent.

Intended Destination of Summer Outbound Travellers



Source: CBoC annual summer vacation travel intention survey of Canadians 18+

During summer 2015, Canadians made an estimated 13.6 million overnight leisure trips to the U.S. and other destinations. One-third of leisure trips were to destinations other than the U.S. (4.4 million). While growth was registered in overseas trips (+11.5%), leisure travel to the United States declined by 1.2 million due to a significant drop in trips by automobile.

Leisure trips to overseas destinations are expected to continue to grow this summer, however total outbound travel is forecast to decline, dropping -1.7 per cent to 13.3 million leisure trips. Trips to the U.S. are expected to decline to 8.5 million (-6.6%) while trips to overseas destinations are expected to surpass 4.7 million (8.6%).

Travel to U.S. Destinations

Thanks to a 10.1 per cent increase in capacity, direct arrivals from Canada to select Florida destinations surpassed 737 thousand passengers in the first quarter of 2016. While this represents a 6.2 per cent increase in air arrivals, the volume of trips by other modes have decreased by an estimated -4.6 per cent so far this year.

Direct passenger arrivals in Hawaii increased by more than 6 thousand passengers in the first quarter of 2016 but indirect arrivals in the state have fallen by almost half bringing the total number of Canadian visitors to 189 thousand, a decline of -12.2 per cent. Direct arrivals in New Orleans have grown 6.3 per cent so far this year, while an increase in capacity resulted in a slight (1.0%) increase in Canadian arrivals at LAX. On the other hand, continued service reductions out of Calgary and Edmonton have led to an -8.7 per cent drop in direct arrivals in Phoenix and -5.3 per cent fewer direct arrivals in Las Vegas.

Direct Air Arrivals to Select U.S. Destinations (January-March each year)

Destination	2012	2013	2014	2015	2016	2016 vs. 2015	CARG*
Orlando	176,749	187,282	180,326	189,643	197,899	4.4%	3.4%
Sarasota	9,691	9,953	11,276	11,341	18,297	61.3%	13.0%
Tampa	46,157	50,606	53,785	61,444	67,680	10.1%	5.0%
Miami	114,164	122,068	129,686	122,465	118,131	-3.5%	2.3%
Fort Myers	39,991	47,158	52,220	54,457	69,670	27.9%	12.9%
Palm Beach	17,857	20,602	23,649	23,712	30,287	27.7%	7.8%
Fort Lauderdale	201,123	201,973	213,259	231,811	235,706	1.7%	4.3%
Total Florida	605,732	639,642	664,201	694,873	737,670	6.2%	4.6%
Hawaii	129,639	129,263	135,309	148,995	155,002	4.0%	9.0%
Las Vegas	207,228	206,172	215,598	225,836	213,770	-5.3%	1.7%
Los Angeles	206,649	205,614	220,386	237,543	239,942	1.0%	3.1%
New Orleans	4,771	4,883	5,371	5,541	5,892	6.3%	--
Phoenix	161,695	163,407	175,837	199,575	182,202	-8.7%	7.1%

Sources: Hawaii's figures from State of Hawaii Department of Business, Economic Development & Tourism. Other figures are from respective airport authorities.

*CARG = Compound Average Annual Rate of Growth from 2008 to 2016.

Though some markets in Arizona and Louisiana saw price decreases, the daily hotel rate in the United States averaged USD \$120.59 in the first quarter of 2016, an increase of 3.2 per cent. Taking the exchange rate into account, the cost per night increased 14.2 per cent to an average of \$165.65 CAD. During the period, the loonie averaged \$0.73 US.

YTD ADR (\$ CAD)	2012	2013	2014	2015	2016	% change YTD average (\$ CAD)	% Change YTD average (\$ USD)
Arizona	\$110.80	\$116.13	\$130.79	\$165.80	\$183.44	10.6%	0.1%
Flagstaff	\$65.03	\$69.38	\$77.90	\$94.84	\$113.18	19.3%	7.9%
Phoenix	\$127.17	\$133.48	\$150.94	\$197.29	\$214.32	8.6%	-1.7%
Tucson	\$102.65	\$104.11	\$115.95	\$132.55	\$155.39	17.2%	6.0%
California	\$117.87	\$124.23	\$145.27	\$176.13	\$211.97	20.4%	8.7%
Anaheim	\$138.50	\$123.18	\$142.49	\$171.61	\$198.92	15.9%	4.8%
Los Angeles	\$128.03	\$135.19	\$157.52	\$189.35	\$233.35	23.2%	11.3%
San Diego	\$125.14	\$127.93	\$149.96	\$175.18	\$198.06	13.1%	2.2%
San Francisco	--	\$167.54	\$185.09	\$219.29	\$273.92	24.9%	12.7%
Florida	\$127.89	\$137.82	\$156.84	\$190.42	\$217.91	14.4%	3.6%
Lake Buena Vista	\$114.31	\$124.91	\$143.51	\$171.15	\$195.08	14.0%	3.0%
Miami	\$201.69	\$224.69	\$253.08	\$311.42	\$361.95	16.2%	5.1%
Orlando	\$105.63	\$111.82	\$128.14	\$150.94	\$175.41	16.2%	5.1%
Hawaii*	\$206.95	\$235.94	\$273.49	\$314.02	\$354.80	13.0%	2.0%
Las Vegas	\$110.10	\$112.49	\$134.36	\$154.27	\$178.55	15.7%	4.2%
Louisiana	\$108.27	\$116.24	\$125.67	\$144.08	\$158.47	10.0%	-0.6%
USA National	\$103.51	\$109.19	\$123.38	\$145.09	\$165.65	14.2%	3.2%

Sources: STR, Respective state and city tourism organizations with conversion to \$ CAD by CBoC. *Hawaii estimate based on weekly ADR reporting for the month.

Travel to Europe

Canadians made almost 583 thousand visits to Europe in the first quarter of 2016 (based on estimates from 24 countries). This represents an increase of 5.4 per cent compared to 2015. So far this winter, the region has experienced 3.6 per cent growth.

Canadian Arrivals in Selected European Countries

Country	YTD	Arrivals		% Change
		2015	2016	
Austria	March	12,230	12,863	5.2%
Belgium*	March	8,081	7,854	-2.8%
Bulgaria	March	1,316	1,574	19.6%
Croatia	March	2,145	2,435	13.5%
Czech Republic	March	7,414	8,445	13.9%
Denmark	March	7,723	9,328	20.8%
Finland	March	2,094	2,579	23.2%
France*	March	95,000	97,366	2.5%
Germany	March	42,946	41,863	-2.5%
Greece*	March	6,586	6,915	5.0%
Hungary	March	3,196	3,399	6.3%
Ireland*	March	22,664	24,930	10.0%
Italy	March	93,000	99,000	6.5%

Country	YTD	Arrivals		% Change
		2015	2016	
Netherlands	March	24,131	24,288	0.6%
Norway	March	5,473	6,236	13.9%
Portugal	March	26,002	33,719	29.7%
Romania	March	2,713	2,874	5.9%
Serbia	March	827	731	-11.6%
Slovenia	March	999	1,030	3.1%
Spain*	March	39,231	41,405	5.5%
Sweden	March	3,377	3,740	10.8%
Switzerland	March	17,700	18,103	2.3%
Turkey	March	21,071	17,137	-18.7%
United Kingdom*	March	107,000	115,000	7.5%

YTD Total (YTD)		552,920	582,813	5.4%
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Sources: respective government statistical agencies for destinations with monthly data available. * CBoC estimates.

Canadian Arrivals in Selected European Cities

City	YTD	Arrivals		% Change
Amsterdam				
Belgrade	Jan-Feb	ADS	273	-6.8
Berlin				
Budapest	Jan-Mar	AA	3,423	16.8
Dresden	Jan-Mar	AA	628	61.4
Dubrovnik				
Genua	Jan	AG	110	-14.1
Hamburg	Jan-Mar	AA	1,265	-0.2
Heidelberg	Jan	AA	118	-19.7
Helsinki	Jan-Mar	AA	1,537	54.8
Innsbruck	Jan-Feb	AA	700	35.1
Lisbon	Jan-Feb	AG	4,036	22.6
Ljubljana	Jan	AA	116	-10.8

City	YTD	Arrivals		% Change
London				
Lucerne	Jan-Mar	AG	612	5.0
Luxembourg	Jan-Mar	AA	673	-20.5
Madrid	Jan-Mar	AG	7,265	8.4
Munich	Jan	AG	2,142	20.5
Nürnberg				
Paris				
Prague	Jan-Mar	AA	6,738	7.9
Salzburg	Jan-Feb	AA	618	-12.1
Scotland				
Tallinn	Jan-Mar	AA	466	2.0
Vienna				
Zagreb				

AA = Arrivals in all forms of paid accommodation in city area only; AAS = Arrivals in all forms of paid accommodation in greater city area; AD = Arrivals of all visitors in city area only; ADS = Arrivals of all visitors in greater city area; AG = Arrivals in hotels and similar establishments in city area only; AS=All overnight visitors.

Travel to Asia and the South Pacific

Canadians made more than 760 thousand visits to the Asia/Pacific region in the first quarter of 2016, a 6.7 per cent increase compared to the previous year. Sri Lanka and Japan saw the largest percentage increase in arrivals, while Malaysia experienced the largest decline. With over 1.2 million arrivals, travel to the Asia/Pacific region reached its highest level during winter 2015-16 posting 5.9 per cent growth compared to the previous year.

Canadian Arrivals in Asia/Pacific Destinations

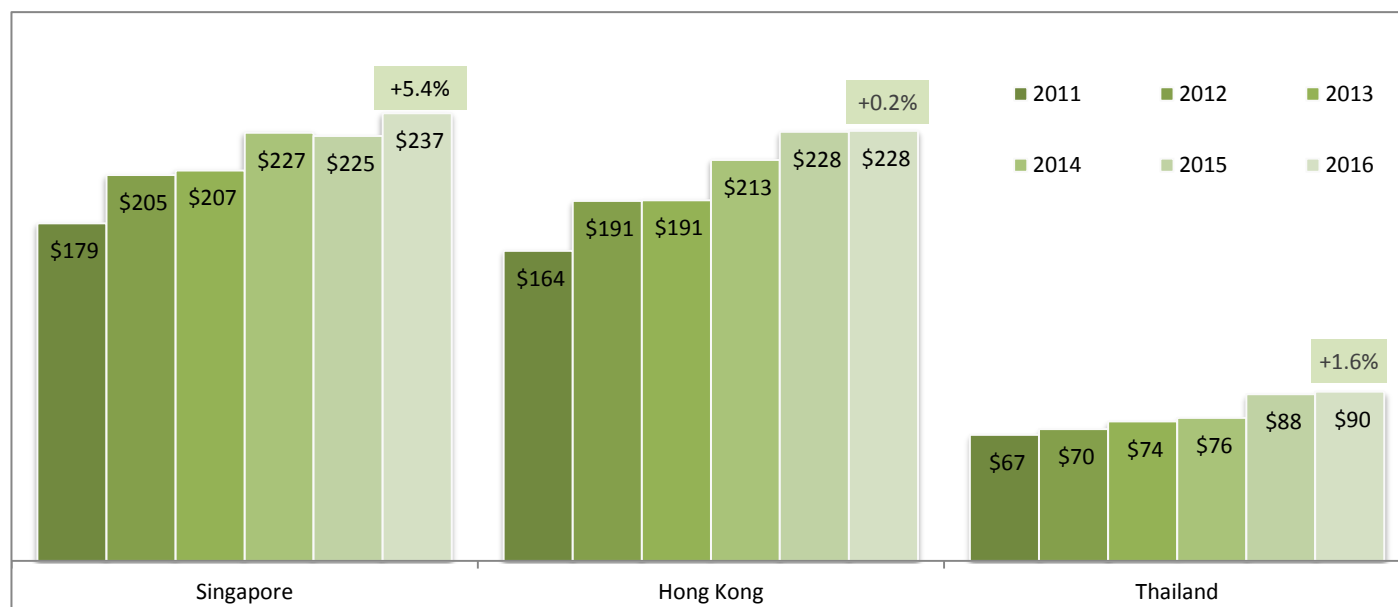
Destination	YTD	2013	2014	2015	2016	% change
Australia	March	41,100	44,300	49,100	50,000	1.8%
Cambodia	March	18,143	19,322	21,227	22,644	6.7%
China*	March	171,300	168,100	164,400	168,000	2.2%
Fiji	March	3,392	3,213	2,908	2,867	-1.4%
Hong Kong	March	90,879	91,365	92,023	95,999	4.3%
Japan	March	35,776	40,351	52,192	61,781	18.4%
Macao	March	17,742	17,914	17,082	18,526	8.5%
Malaysia*	March	26,097	28,821	24,029	22,411	-6.7%
New Zealand	March	20,576	20,560	21,200	24,080	13.6%
Philippines	March	38,486	42,839	46,756	53,301	14.0%
Singapore	March	28,428	31,340	31,305	32,066	2.4%
South Africa	March	18,214	17,035	15,675	16,764	6.9%
South Korea	March	30,461	30,255	34,520	35,705	3.4%
Sri Lanka	March	7,579	8,320	9,385	11,437	21.9%
Taiwan	March	17,277	21,032	22,231	25,462	14.5%
Thailand	March	72,339	67,008	72,426	78,785	8.8%
Vietnam	March	33,122	37,525	36,467	40,679	11.6%
Total (YTD)		670,911	689,300	712,926	760,507	6.7%

Sources: Respective tourism authorities/boards. *CBoC estimate.

Compared to the same period in 2015, the average room rate in Canadian dollars increased 5.4 per cent in Singapore, 1.6 per cent in Thailand, and 0.2 per cent in Hong Kong. The increased cost for Canadians in these destinations is due to the exchange rate; in local currency the average rate declined -9.3 per cent in Hong Kong, -1.6 per cent in Singapore, and -0.1 per cent in Thailand.

Asia/Pacific: Hotel Rates in \$ CAD

(January - March ADR each year)



Sources: Government agencies within each country.

Travel to the Caribbean & Mexico

While the volume of travel to the Caribbean and Mexico in the first quarter of 2016 was similar to that seen one year ago, the distribution of visits is quite different. Compared to 2015, only Mexico, Cuba, and the Dominican Republic experienced a significant increase in the volume of visitors. Canadian arrivals in the Dominican Republic increased 2.6 per cent, while Cuba and Mexico saw growth of 1.1 per cent and 0.6 per cent, respectively. Even with the uptick in visitation to these countries, overall growth for the region faltered slightly, dropping -0.8 per cent.

Canadians made more than 3 million trips to the Caribbean during the first five months of the winter 2015-16 season, which was -1.0 per cent less than last winter, but more than the three winters prior. Two-thirds (66.0%) of winter trips to the region were to Cuba and the Dominican Republic. So far this winter, arrivals in Mexico have surpassed 1.15 million Canadians, an increase of 0.7 per cent compared to the previous year.

Canadian Arrivals in the Caribbean and Mexico

	YTD	2013	2014	2015	2016	% Change
Anguilla	March	1,308	1,573	1,546	1,528	-1.2%
Antigua & Barbuda	March	14,591	13,788	10,879	9,900	-9.0%
Aruba	March	16,743	16,648	18,014	16,665	-7.5%
Bahamas*	March	43,972	52,686	59,277	57,390	-3.2%
Barbados*	March	26,874	24,094	30,931	28,863	-6.7%
Belize	March	12,227	13,049	11,507	9,860	-14.3%
Bermuda	March	6,273	6,277	5,317	4,498	-15.4%
Cayman Islands	March	9,275	10,335	10,124	9,345	-7.7%
Costa Rica	March	75,151	81,370	84,191	84,414	0.3%
Cuba*	March	463,704	490,454	551,259	557,055	1.1%
Curaçao	March	5,042	6,366	8,070	9,390	16.4%
Dominican Republic	March	322,349	323,127	331,044	339,770	2.6%
Grenada*	March	3,548	4,738	4,641	4,977	7.2%
Jamaica	March	149,969	153,070	144,669	125,772	-13.1%
Mexico	March	710,287	757,959	771,040	775,284	0.6%
Panama	March	27,079	27,937	21,779	15,902	-27.0%
Puerto Rico*	March	9,214	10,103	10,170	10,236	0.7%
St. Kitts/Nevis*	March	3,009	3,615	4,217	4,006	-5.0%
St. Lucia	March	16,220	17,926	20,371	17,550	-13.9%
St. Vincent	March	2,367	2,122	2,340	2,111	-9.8%
Arrivals (YTD)		1,919,202	2,017,237	2,101,386	2,084,516	-0.8%

Sources: CTO and respective tourism organizations. *CBoC estimates.

Dominican Republic: Canadians made almost 340 thousand visits to the Dominican Republic in the first quarter of 2016, a 2.6 per cent increase compared to 2015. Most of the growth was due to a boost in visits to Puerto Plata, which has welcomed almost 8 thousand more Canadians than during the same period in 2015. So far this winter, visits to the island have increased 3.6 per cent, making it one of the best performing destinations in the region during the season.

Dominican Republic: Canadian Arrivals by Destination
(January-March each year)

Destination	2011	2012	2013	2014	2015	2016	% Change
Las Americas	4,287	5,976	2,811	2,571	2,320	1,887	-18.7%
Puerto Plata	62,562	76,674	69,107	64,664	62,659	70,515	12.5%
Punta Cana	240,978	235,172	224,185	224,427	237,274	230,635	-2.8%
La Roma	13,745	14,065	10,954	11,704	9,698	13,513	39.3%
El Ciabo	506	690	728	544	401	283	-29.4%
La Isabela	120	124	17	--	--	--	--
El Catey (Samana)	13,433	15,304	14,547	19,217	18,692	22,937	22.7%
Total	335,631	348,005	322,349	323,127	331,044	339,770	2.6%

Source: Government of Dominican Republic

Jamaica: Compared to the same period in 2015, Canadian arrivals in Jamaica during the first quarter of 2016 fell by 19 thousand trips, or 13.1 per cent. While Canada continues to be an important market for Jamaica, the country's largest travel markets (Ontario, Quebec, and Alberta) took 15 thousand fewer trips during the period. Ontario fell by -9.1 per cent, Quebec recorded a decrease of -24.4 per cent, while arrivals from Alberta fell by 22.4 per cent. The first five months of the winter season saw arrivals in Jamaica fall by more than 27 thousand Canadians, a drop of -11.9 per cent.

Jamaica: Canadian Arrivals by Province
(January-March each year)

Annual Arrivals	2012	2013	2014	2015	2016	% change
Alberta	15,728	14,079	13,919	11,642	9,034	-22.4%
BC	5,029	4,322	3,995	3,252	3,116	-4.2%
Manitoba	6,937	5,371	6,494	5,813	5,562	-4.3%
New Brunswick	3,433	3,238	3,137	2,578	2,035	-21.1%
Newfoundland	1,620	2,005	1,751	1,390	1,382	-0.6%
Nova Scotia	5,588	4,901	5,282	4,950	3,727	-24.7%
Ontario	97,332	84,676	89,440	87,823	79,859	-9.1%
PEI	560	456	568	342	343	0.3%
Quebec	23,820	22,699	21,576	20,406	15,431	-24.4%
Saskatchewan	10,783	7,995	6,707	6,297	5,063	-19.6%
Other	224	227	165	176	220	25.0%
Total	171,054	149,969	153,034	144,669	125,772	-13.1%

Source: Government of Jamaica.

Mexico: More than 775 thousand Canadians visited Mexico during the first quarter of 2016, a slight increase (0.6%) compared to last year. During the period, 72.6 per cent of arrivals were in Cancun and Puerto Vallarta. So far this winter, arrivals have surpassed 1.15 million Canadians, an increase of 0.7 per cent compared to the previous year.

Mexico: Canadian Visitors by Destination
(January-March each year)

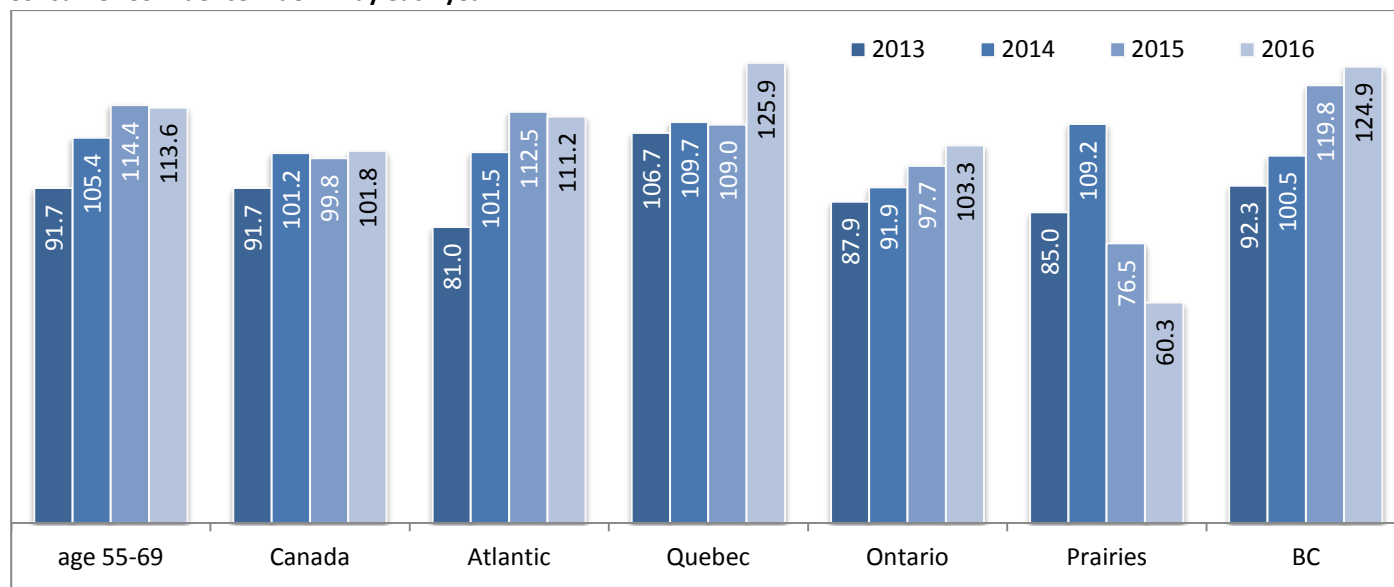
Destination	2012	2013	2014	2015	2016	% change
Cancún	422,102	395,507	410,794	416,933	404,298	-3.0%
Puerto Vallarta	141,574	139,960	152,959	161,933	158,836	-1.9%
Los Cabos	59,156	61,850	63,814	54,254	56,161	3.5%
México	24,102	27,122	29,748	29,599	41,476	40.1%
Zihuatanejo	15,219	10,562	20,649	25,846	26,463	2.4%
Huatulco	13,662	19,192	22,624	23,720	27,955	17.9%
Mazatlán	16,991	16,389	17,309	17,157	18,168	5.9%
Manzanillo	14,883	11,422	12,599	14,020	10,788	-23.1%
Cozumel	15,253	12,322	11,990	12,955	15,037	16.1%
Guadalajara	2,802	2,580	3,103	2,857	2,542	-11.0%
Acapulco	5,530	6,474	4,457	3,732	3,439	-7.9%
Other Destinations	6,700	6,907	7,913	8,034	10,121	26.0%
Total	737,974	710,287	757,959	771,040	775,284	0.6%

Source: Mexico Tourist Board

Consumer Confidence

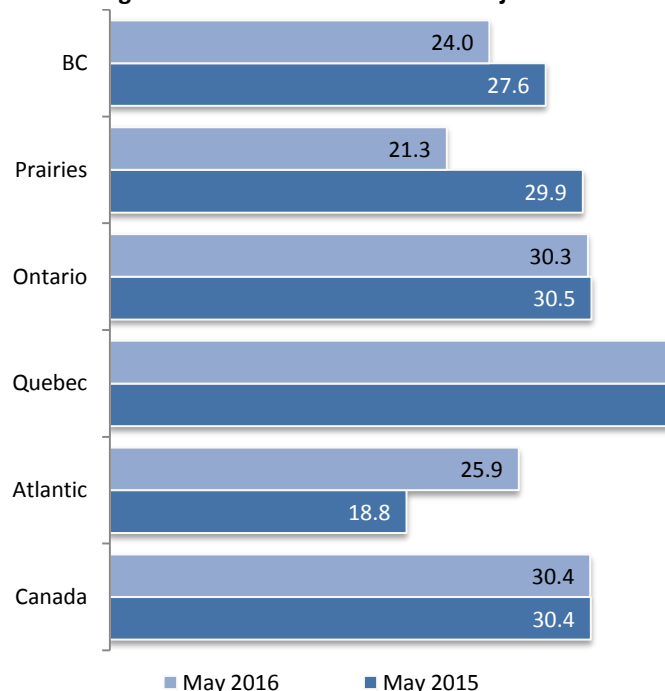
The national consumer confidence rating was 101.8 points in May, an increase of 7.3 points compared to April, and a higher rate than seen one year ago (2.0%). In addition to this slight uptick in consumer confidence, a similar proportion of Canadians indicated May was a good time to make a major purchase. At 30.4 per cent, the national rating is similar to that recorded in May 2015, and is the highest it has been so far in 2016. Compared to the same month in 2015, retail sales grew 3.2 per cent in March posting strong increases in all provinces except Saskatchewan and Alberta.

Consumer Confidence Index: May each year



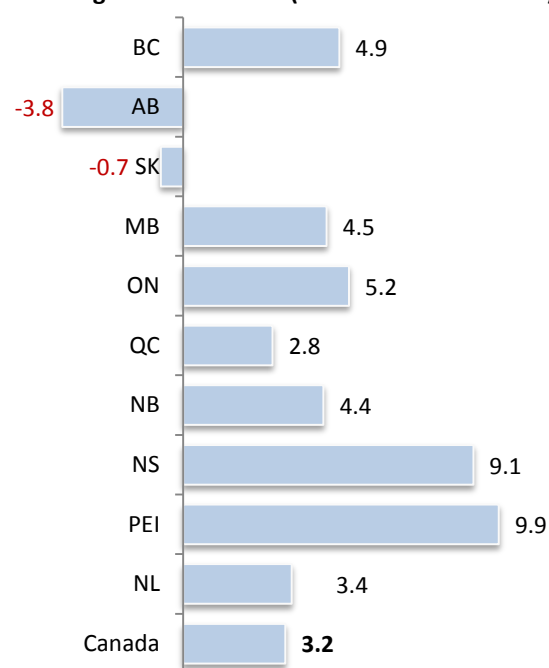
Source: CBoC

% Indicating it is a "Good Time to Make a Major Purchase"



Source: CBoC.

% Change in Retail Sales (Mar 2015 to Mar 2016)



Source: Statistics Canada (63-005-X)