Alberta Tourism Market Monitor April 2021



February 2021 **-86.7%** y/y (YEG and YYC)

Highway Count



March 2021 +40.9% y/y

National Parks Attendance



March 2021 +52.4% y/y (Banff, Jasper and Waterton Lakes only)



March 2021 +13.1% (Tourism Industry)

Occupancy Rate



February 2021

-24.9 pts y/y

(Total Alberta
excluding Resorts)

Average Daily Room Rate



February 2021

-19.3% y/y (Total Alberta excluding Resorts)

Receipts, Food Services & Drinking Places



January 2021 **-36.3%** y/y

Historic Sites & Museums Attendance



March 2021 **-100%** y/y

Exchange Rates



March 2021

.80 USD .67 EUR .57 GBP

Oil Price



March 2021 **\$62.33**

(USD/barrel)

Major Tourism Projects



March 2021 **\$289**

(millions)

Alberta
Parks Campsite
Reservations



March 2021 **67.645**

Please note: Aberta announced the first case of COVID-19 on March 5 and declared a public health state of emergency on March 17, 2020. All non-essential businesses were asked to close on March 27, 2020. Alberta's phased relaunch began on May 14, 2020. All Parks Canada facilities were temporarily closed from March 25, 2020, and opened for day use on June 1, 2020. All provincial parks closed on March 17 and reopened on May 14, 2020. The Royal Alberta Museum and Royal Tyrrell Museum opened on May 16 and 22, respectively while another five historical sites opened on June 20, 2020. A second public health state of emergency was declared on November 24, 2020. Effective Dec. 13, 2020, some businesses including museums are required to temporarily close, reduce capacity or limit their in-person access.

https://www.alberta.ca/tourism-industry-market-information.aspx

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						arket Mo							
	Jan.	Feb.	Mar.		May	and Innova		August	Sept.	Oct.	Nov.	Dec.	Yr-to-Date
Air December 2024 (000) of arrivals and departs		reb.	War.	Apr.	Iwidy	Julie	July	August	зері.	Oct.	NOV.	Dec.	11-10-Date
Air Passengers 2021 (000's of arrivals and departu Edmonton International Total	83.1p	64.2p											147.3p
Per cent change from 2020	-85.8%	-88.7%											-87.2%
Domestic	-83.8% 80.5p	63.8p											144.4p
		-85.0%											-83.2%
Per cent change from 2020 Transborder	-81.5%												
	0.7p -99.2%	0.0p -100.0%											0.7p
Per cent change from 2020	-99.2% 1.8p	0.4p											-99.6% 2.2p
International Per cent change from 2020	-97.2%	-99.4%											-98.2%
Calgary International Total	256.2r	189.5p						-					445.7p
Per cent change from 2020	-81.0%	-85.8%											-83.4%
Domestic	206.7r	174.3p											381.0p
Per cent change from 2020	-76.8%	-80.1%											-78.4%
Transborder	29.9p	10.9p											40.8p
	-89.4%	-96.1%						-					-89.4%
Per cent change from 2020	19.6p												23.9p
International Per cent change from 2020		4.3p					1	-		1			•
Per cent change from 2020 Fort McMurray International Total	-89.0% 12.2	-97.6% 11.4						-					-93.2% 23.6
Fort McMurray International Total	12.2						1			1			23.6
Per cent change from 2020	-73.0%	-74.0%											-74.0%
Highway Count 2021 (000's of vehicles) ²	50.7	50.0	60.5										400 7
Hwy 1 - Sask border w-bound	53.7	50.6	62.5				1	-					166.7
Per cent change from 2020	-6.3%	-16.0%	10.8%										-4.1%
Hwy 1 - Banff Pk Gate (2-way)	589.1	522.4	670.3										1,781.9
Per cent change from 2020	8.0%	-8.5%	54.2%										14.9%
Hwy 16 - Jasper Pk Gate (2-way)	104.1	96.2	135.2										335.4
Per cent change from 2020	4.3%	-8.1%	35.1%										10.1%
Hwy 16 - Blackfoot w-bound	115.1	111.2	138.9										365.1
Per cent change from 2020	-18.7%	-22.0%	12.6%										-10.4%
National Park Attendance (000's of visitors) 2021 ³	207.3	190.1	ours 239.6		<u> </u>	<u> </u>	<u> </u>	<u> </u>	<u> </u>	<u> </u>	<u> </u>	<u> </u>	626.0
Banff	4.1%	-9.5%	54.3%										636.9 12.9%
Per cent change from 2020			77.8										-
Per cent change from 2020	59.6 -2.9%	-7.2%	40.2%										193.3 9.1%
Waterton Lakes	15.3	11.1	16.9										43.2
Per cent change from 2020	44.3%	35.7%	97.2%										58.3%
Elk Island	40.3	27.3	41.1										108.7
			124.8%										
Per cent change from 2020	194.1%	72.4%	0.17										127.3%
Wood Buffalo Per cent change from 2020	677.3%	0.9%	956.3%										204.7%
•		0.9%	930.376										204.7 %
Employment (000's of persons) 2021 Seasonally A Accommodation and Food Services	85.3	104.5	104.3										98.0
													-29.7%
Per cent change from 2020 Tourism Unemployment Rate 2021 Seasonally una	-44.6%	-31.7%	-6.3%										-29.7%
		16.2%	12 19/		<u> </u>	<u> </u>	<u> </u>	<u> </u>	<u> </u>	<u> </u>	<u> </u>	<u> </u>	47 20/
Tourism Unemployment Rate	22.6% 18.6	11.1	13.1% -1.0										17.3% 9.6
Point change from 2020 Sources: Edmonton International Airport, Calgary Inter				anal Airport A	lborta Transr	ortation Park	ke Canada an	d Statistics Ca	mada				9.6
	national Airpo	rt, i ort wiciviui	ray internatio	mai Airport, A	mberta Transp	ortation, Pari	as Canada an	a otatistics Ca	matta.				
Accommodation Indices for Major Regions 2021 ⁶	Jan.	Feb.	Mar.	Ans	May	June	lube	August	Sont	Oct.	Nov.	Dec.	Yr-to-Date
Edmonton Occupancy Pote	Jan. 19.3%	Peb. 22.6%	war.	Apr.	May	June	July	August	Sept.	Oct.	NOV.	Dec.	20.9%
Edmonton Occupancy Rate		-30.2										 	-27.1
Point change from 2020	-24.1 \$89.62	-30.2 \$90.01										 	-27.1 \$90.34
Average daily room rate								-					-
Variance from 2020	- 26.5%	-27.3%					1			1			-26.9%
Revenue per available room	\$17.33	\$20.56						 		1			\$18.87
Calgary Occupancy Rate	14.3%	18.6%					1			1			16.4%
Point change from 2020	-30.1	-33.5					1	 		1			-31.8
Average daily room rate	\$93.03	\$100.26						1					\$96.93
Variance from 2020	-29.2%	-25.5%					1	<u> </u>		1		1	-27.1%
Revenue per available room	\$13.35	\$18.64											\$15.86

	Jan.	Feb.	Mar.	Apr.	May	June	July	August	Sept.	Oct.	Nov.	Dec.	Yr-to-Date
Alberta Resorts Occupancy Rate	20.5%	33.0%		•									26.4%
Point change from 2020	-29.6	-26.6											-28.3
Average daily room rate	\$189.46	\$214.78											\$204.49
Variance from 2020	- 20.7%	-12.2%											-15.4%
Revenue per available room	\$38.77	\$70.87											\$54.03
Other Alberta ^a Occupancy Rate	24.1%	29.6%											26.7%
Point change from 2020	-14.1	-15.5											-14.8
Average daily room rate	\$103.13	\$105.23											\$104.24
Variance from 2020	-9.7 %	-9.3%											-9.5%
Revenue per available room	\$24.89	\$31.12											\$27.87
Total Alberta (excl. Resorts) ©ccupancy Rate	19.9%	24.4%											22.1%
Point change from 2020	-21.6	-24.9											-23.2
Average daily room rate	\$97.28	\$100.39											\$98.92
Variance from 2020	-20.1%	-19.3%											-19.7%
Revenue per available room	\$19.36	\$24.50											\$21.81
Accommodation Indices for Selected Cities or Tow		¥£4.00											421.01
Occ%= Occupancy Rate ADR= Average Daily								February			Year-To-Date		
Room Rate RevPar= Revenue Per	Occ%	ADR	RevPar	Occ%	Year-To-Date ADR	RevPar		Occ%	ADR	RevPar	Occ%	ADR	RevPar
Available Room Airdrie	27.2	\$80.84	\$22.00	23.9	\$81.13	\$19.42	Banff	34.3	\$191.54	\$65.67	26.0	\$183.83	\$47.87
Bonnyville	34.7	\$78.72	\$27.29	30.3	\$79.29	\$23.99	Canmore	41.1	\$142.15	\$58.46	34.3	\$134.68	\$46.26
Drayton Valley	60.8	\$101.04	\$61.41	57.7	\$101.07	\$58.36	Drumheller	12.7	\$108.69	\$13.83	11.0	\$106.79	\$11.80
Edson	47.3	\$107.97	\$51.07	44.9	\$108.85	\$48.85	Fort Mac	39.8	\$129.11	\$51.33	34.2	\$127.80	\$43.66
Fort Saskatchewan	18.0	\$94.08	\$16.89	15.1	\$93.73	\$14.13	Gr. Prairie	36.9	\$123.11	\$45.06	33.9	\$121.17	\$43.00
High Level	34.5	\$125.45	\$43.28	31.2	\$125.24	\$39.05	Hinton	28.8	\$91.24	\$26.32	25.8	\$91.43	\$23.56
-	37.1	\$175.87	\$65.29	34.7	\$163.76	\$56.85	Leduc	17.9	\$80.00	\$14.30	18.1	\$80.79	\$14.60
Jasper Lethbridge	21.2	\$92.62	\$19.65	18.8	\$90.82	\$17.10	Lloydminster	25.6	\$103.34	\$26.49	24.7	\$103.14	\$25.45
Med. Hat	21.6	\$98.39	\$21.26	20.5	\$95.98	\$17.10	Nisku	20.3	\$72.28	\$14.69	18.3	\$73.11	\$13.40
Red Deer	19.4	\$87.63	\$16.97	17.3	\$87.57	\$15.19	Sherwood Pk.	18.4	\$89.89	\$16.58	16.6	\$89.63	\$13.40
Whitecourt	31.6	\$93.77	\$29.67	29.0	\$93.85	\$27.19	Total Alberta	25.8	\$117.19	\$30.20	22.9	\$113.55	\$26.00
Sources: CBRE Hotels Trends in the Hotel Industr	<u> </u>				\$95.05	\$27.19	Total Alberta	25.0	\$117.19	\$30.20	22.5	\$115.55	\$20.00
Food Services and Drinking Places 2021 (\$ Millions	<u> </u>		t and official										
	\$470.93	u I											\$470.93
Total Receipts for Alberta Per cent change from 2020	-36.3%						 						-36.3%
Historic Sites and Museums 2021 (000's of visitors													-30.3%
	0.0	0.0	0.0										0.0
Visitor Attendance ^c Per cent change from 2020	-100.0%	-100.0%	-100.0%										-100.0%
Exchange Rates 2021 ¹⁰	-100.076	-100.076	-100.0%										-100.0%
Canadian Dollar / U.S. Dollar (noon)	0.79	0.79	0.80				l						0.79
Canadian Dollar / C.S. Dollar (110011) Canadian Dollar / Euro	0.79	0.79	0.67				 						0.66
Canadian Dollar / British Pounds	0.58	0.65	0.67										0.57
Oil Price: Western Texas Intermediate (WTI) 2021 ¹¹	l e	0.57	0.57										0.57
Cushing, OK Spot Price (U.S. Dollar per barrel)	52.00	59.04	62.33										57.79
Major Tourism Projects Valued \$5 million or Greate	l e		02.33										57.79
	er 2021 (\$ Mi \$301	\$301	\$289										\$289
Total Value of Hotel Projects Inventory Alberta Provincial Parks Campsite Reservations 20		\$301	\$209										\$209
Reservations made on Reserve.AlbertaParks.ca	62	181	67,645										67,826
Sources: Statistics Canada, Alberta Culture, Multic	sulturalism a	and Status of	Woman Ra	nk of Conor	lo MTL Cov	ornment of l	Alborto Albo	rta Environn	nont and Day	ko			

Other Alberta includes Lethbridge, Red Deer and other Alberta communities.

Per STR's data reporting guidelines, they only close properties if they were closed for a full calendar month (i.e. March 1 – March 31). If a property was open March 1-14, but closed March 15-31, they would consider that ^c All historical sites and museums must close effective Dec 13, 2020 due to provincewide mandatory restriction.

Note: New monthly figures are shown in bold type. Revisions will be bolded. r=revised p=preliminary

- 1. Air Passengers Numbers are preliminary estimates of air passenger arrivals and departures at the Edmonton International and Calgary International Airports. Since September 2015, total domestic passengers at Fort McMurray International Airport has been added, which comprise commercial and charter passengers. Source: Edmonton International Airport, Calgary International Airport and Fort McMurray International Airport websites.
- 2. Highway Traffic These are monthly totals. The monthly average daily traffic (average number of vehicles per day) is calculated by dividing the monthly total by the number of days in the month passing the counter locations and in the direction indicated for a particular month. Automatic Traffic Recorders count all vehicles by direction. Year to date is a cumulative total for all vehicles.

Source: Alberta Transportation's Automatic Traffic Recorders (ATR). https://www.alberta.ca/highway-traffic-counts.aspx

3. National Park Attendance - Attendance is reported as the number of visits to National Parks in Alberta. Data are preliminary unless otherwise noted.

Banff National Park and Jasper National Park reflect independent travellers only and do not include people travelling as part of a tour group. Tour group data is included in the annual edition of Market Monitor. Source: Parks Canada.

4. Employment Food and Accommodation Sector - The employment figure represents all persons who worked for pay, profit or unpaid work in the food services and accommodation sector, including businesses or other ventures owned or operated by a related family member(s) during the reference period of the survey. The year-to-date total is an average for the year.

Source: Statistics Canada, Labour Force Survey.

https://www150.statcan.gc.ca/t1/tbl1/en/tv.action?pid=1410035501

- **5. Tourism Unemployment-** The unemployment rate is calculated as number of unemployed persons expressed as a percentage of the labour force in tourism industry. Source: Tourism HR Canada.
- **6. Accommodation Indices for Major Regions** Occupancy rates and average daily room rates are based on monthly averages of all reporting hotels, motels and motor hotels in each designated region. Alberta Resorts includes the resort communities of Banff, Lake Louise, Kananaskis, Canmore and Jasper.

Revenue per available room is calculated using the occupancy rate and average daily room rate.

Source: CBRE Hotels Trends in the Hotel Industry National Market Report, with reproduction and use of information subject to CBRE Disclaimer and Restrictions as detailed at https://www.cbre.ca/en/real-estate-services/business-lines/valuation-and-advisory-services/hotels-valuation-and-advisory-services/disclaimer

7. Accommodation Indices for Selected Cities or Towns - Destination reports are publications of Smith Travel Research Inc. (STR). Terms and conditions governing the ownership, distribution and use of these Destination Reports and their contents include that no historic data can be published, only current month and year-to-date data.

Source: STR, LLC. Republication or other re-use of this data without the express written permission of STR is strictly prohibited.

8. Food Services and Drinking Places - The monthly survey of Food Services and Drinking Places provides estimates of the value of sales and the number of locations of restaurants, caterers, and drinking places by province and by industry at the North American Industry Classification System (NAICS) four-digit level. Includes total receipts from restaurants, caterers and taverns for chain and independent establishments. The target population is the three-digit NAICS level of 722, which includes: full-service restaurants, limited service eating places, special food places and drinking places. The year-to-date total is an average for the year. Source: Statistics Canada, Food Services and Drinking Places.

https://www150.statcan.gc.ca/t1/tbl1/en/tv.action?pid=2110001901

9. Historic Sites and Museums - Visitor attendance figures are monthly totals based on 18 historic sites and museums. The Royal Alberta Museum opened on Oct 3, 2018 after closure on December 6, 2015. Data for Brooks Aqueduct is no longer collected starting June 2018.

Source: Alberta Culture, Multiculturalism and Status of Women.

10. Exchange Rate - This is the average monthly exchange rate.

Source: Bank of Canada.

https://www.bankofcanada.ca/rates/exchange/monthly-exchange-rates/

11. Western Texas Intermediate - This is the average monthly oil price.

Source: Cushing, OK WTI Spot Price FOB.

https://www.eia.gov/dnav/pet/hist/LeafHandler.ashx?n=PET&s=RWTC&f=M

12. Major Hotel Projects in Alberta - This is the inventory of hotel projects in Alberta, including new hotels and renovations valued at \$5 million or greater. It is not a complete list of hotel projects. The project stages included in the reported number are: announced, under construction and completed. If the project is completed, it will be removed from the inventory after 30 days from completion. More information on other tourism and recreation projects is available on the website provided below.

Source: Government of Alberta. http://majorprojects.alberta.ca/

13. Alberta Provincial Parks Campsite Reservations - Individual campsites, group camping areas, comfort camping and backcountry camping reservations are included. Note that reservation statistics reflect the month the reservation was made, and not the date of stay. Only sites available on the Reserve.AlbertaParks.ca are captured. Non-reservable sites that are First Come First Served and sites available for phone-in reservation only are not captured and thus not reflected.

Source: Alberta Environment and Parks.

April 2021