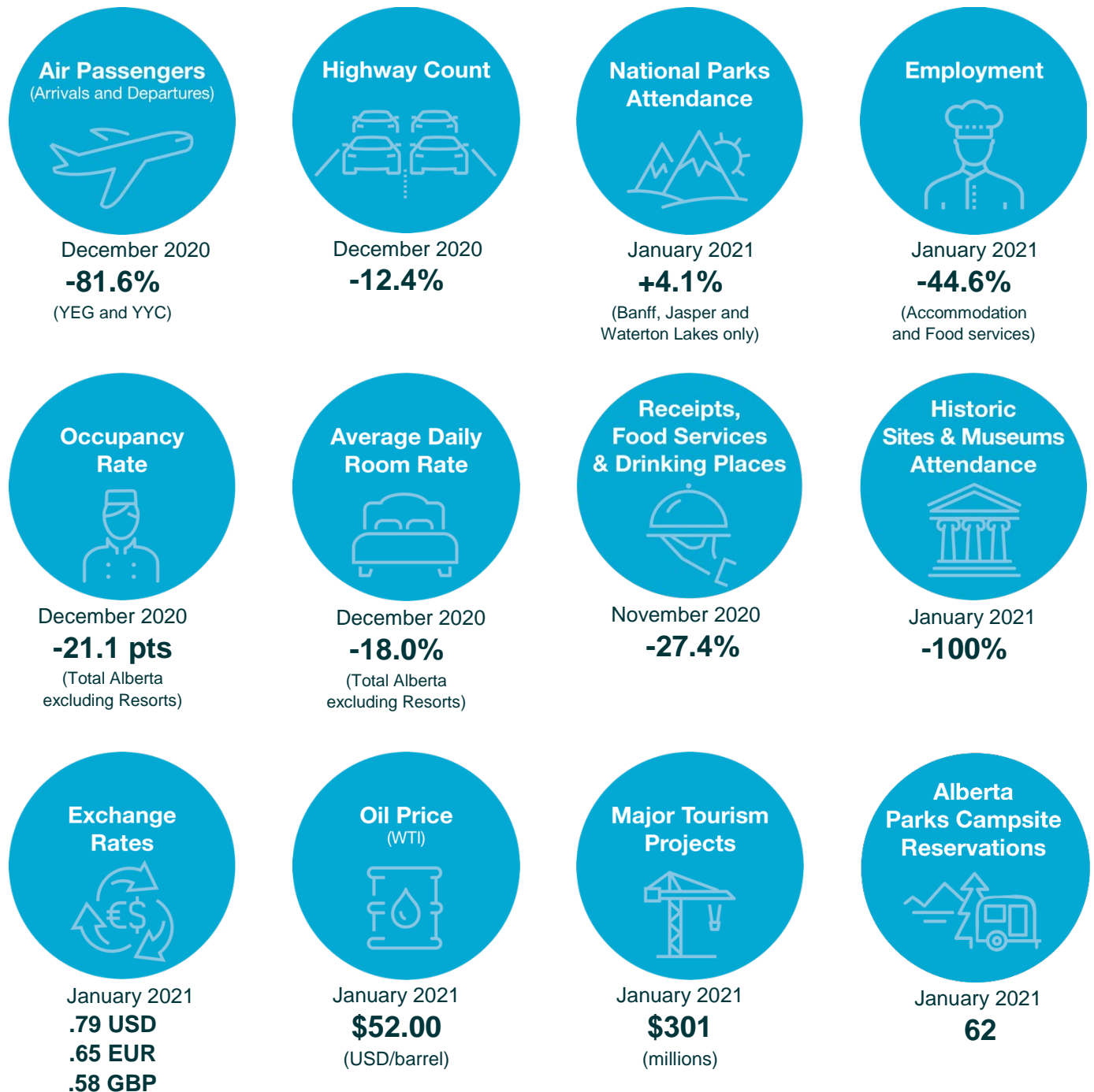


# Alberta Tourism Market Monitor February 2021



Please note: Alberta 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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**2020/2021 Alberta Tourism Market Monitor**

Alberta Jobs, Economy and Innovation

	Jan.	Feb.	Mar.	Apr.	May	June	July	August	Sept.	Oct.	Nov.	Dec.	Yr-to-Date
<b>Air Passengers 2020 (000's of arrivals and departures)<sup>1</sup></b>													
Edmonton International Total	583.3p	569.0p	344.1p	22.1p	27.5p	57.5p	115.3p	139.0p	117.0p	119.6p	102.0p	97.5p	2,924.1p
Per cent change from 2019	-5.3%	-5.5%	-47.6%	-96.5%	-95.7%	-90.9%	-83.7%	-81.0%	-80.7%	-80.1%	-82.6%	-84.8%	-70.0%
Domestic	436.6p	424.5p	271.8p	21.7p	27.0p	56.8p	115.1p	139.0p	117.0p	119.0p	100.2p	95.1p	1,923.7p
Per cent change from 2019	-5.1%	-4.4%	-44.8%	-95.6%	-95.0%	-89.8%	-81.7%	-76.8%	-80.7%	-76.4%	-77.5%	-80.8%	-69.2%
Transborder	81.6p	82.3p	41.7p	0.4p	0.4p	0.8p	0.2p	0.0p	0.0p	0.1p	0.7p	0.6p	209.2p
Per cent change from 2019	-15.4%	-18.8%	-59.9%	-99.6%	-99.4%	-98.7%	-99.7%	-100.0%	-100.0%	-99.8%	-99.3%	-99.3%	-78.5%
International	65.1p	62.2p	30.6p	0.0p	0.0p	0.0p	0.0p	0.0p	0.0p	0.4p	1.1p	1.8p	161.2p
Per cent change from 2019	10.1%	9.7%	-49.9%	-100.0%	-100.0%	-100.0%	-100.0%	-100.0%	-100.0%	-97.4%	-97.7%	-96.9%	-64.2%
Calgary International Total	1334.4r	1334.7r	814.3r	68.1r	81.0p	142.3p	288.7p	371.6p	326.3r	329.8r	283.2r	286.9p	5,675.5p
Per cent change from 2019	-3.9%	-0.5%	-45.1%	-95.2%	-94.5%	-91.0%	-83.8%	-79.3%	-78.7%	-77.3%	-78.1%	-80.1%	-68.4%
Domestic	878.5r	876.1r	549.1r	66.1r	78.4p	138.3p	278.5p	357.8p	310.8r	308.1r	251.8r	233.9p	4,339.4p
Per cent change from 2019	-6.4%	-1.4%	-45.3%	-93.1%	-92.6%	-87.6%	-78.3%	-72.5%	-71.5%	-70.4%	-71.4%	-76.4%	65.3%
Transborder	279.1p	283.1	154.6r	1.6p	2.6p	4.0p	8.2p	9.1p	9.4p	13.7p	19.9p	31.2p	817.9p
Per cent change from 2019	5.0%	3.5%	-51.3%	-99.4%	-99.0%	-98.7%	-97.5%	-97.2%	-96.8%	-95.3%	-92.8%	89.1%	-76.8%
International	176.8p	175.5r	110.5r	0.3p	0.0p	0.0p	2.0p	4.7p	6.1p	8.1p	11.6p	21.8p	518.1p
Per cent change from 2019	5.0%	-2.3%	-43.2%	-99.8%	-100.0%	-100.0%	-98.8%	-97.2%	-95.8%	-93.1%	-91.5%	-86.8%	-73.0%
Fort McMurray International Total	45.7	43.5	29.0	3.9	4.3	7.9	14.5	16.9	16.1	17.7	15.8	14.1	229.3
Per cent change from 2019	-6.5%	-8.1%	-42.0%	-92.2%	-91.6%	-83.8%	-72.5%	-67.9%	-66.8%	-65.4%	-65.6%	-71.0%	-61.5%
<b>Highway Count 2020 (000's of vehicles)<sup>2</sup></b>													
Hwy 1 - Sask border w-bound	57.3	60.2	56.4	41.8	56.7	69.5	89.4	100.2	83.2	78.802	57.78	53.9	805.1
Per cent change from 2019	-1.6%	13.8%	-13.1%	-41.6%	-28.7%	-19.3%	-17.1%	-11.8%	3.2%	-0.1%	-13.4%	-25.5%	-13.7%
Hwy 1 - Banff Pk Gate (2-way)	545.7	571.1	434.6	257.0	448.7	672.7	1,016.8	1,112.7	816.2	621.1	525.51	539.0	7,561.1
Per cent change from 2019	-4.6%	23.9%	-31.1%	-57.3%	-36.9%	-19.2%	-4.2%	-0.6%	6.8%	2.3%	2.1%	-9.2%	-10.7%
Hwy 16 - Jasper Pk Gate (2-way)	99.9	104.6	100.1	72.8	109.9	155.2	218.7	252.2	174.1	127.2	93.54	102.0	1610.1
Per cent change from 2019	1.3%	28.6%	-23.7%	-48.1%	-41.6%	-20.2%	-20.3%	-4.9%	2.8%	6.3%	4.9%	-6.2%	-13.5%
Hwy 16 - Blackfoot w-bound	141.5	142.6	123.3	88.4	119.1	139.5	157.2	165.4	160.8	154.5	129.27	122.0	1643.7
Per cent change from 2019	-3.6%	6.6%	-24.1%	-46.5%	-33.3%	-17.6%	-16.7%	-13.7%	-4.1%	-11.5%	-18.9%	-22.8%	-17.7%
<b>National Park Attendance (000's of visitors) 2021<sup>3</sup> Does not include group tours</b>													
Banff	207.3												207.3
Per cent change from 2020	4.1%												4.1%
Jasper	59.6												59.6
Per cent change from 2020	-2.9%												-2.9%
Waterton Lakes	15.3												15.3
Per cent change from 2020	44.3%												44.3%
Elk Island	40.3												40.3
Per cent change from 2020	194.1%												194.1%
Wood Buffalo	0.2												0.2
Per cent change from 2020	677.3%												677.3%
<b>Employment (000's of persons) 2021 Seasonally Adjusted<sup>4</sup></b>													
Accommodation and Food Services	85.3												85.3
Per cent change from 2020	-44.6%												-44.6%
<b>Sources: Edmonton International Airport, Calgary International Airport, Fort McMurray International Airport, Alberta Transportation, Parks Canada and Statistics Canada.</b>													
<b>Accommodation Indices for Major Regions<sup>5</sup> 2020<sup>5</sup></b>													
	Jan.	Feb.	Mar.	Apr.	May	June	July	August	Sept.	Oct.	Nov.	Dec.	Yr-to-Date
Edmonton Occupancy Rate	43.5%	52.8%	29.1%	11.6%	15.9%	22.9%	26.7%	34.0%	30.2%	26.0%	23.2%	19.3%	28.4%
Point change from 2019	-5.7	-3.9	-32.2	-48.7	-43.4	-38.8	-31.6	-22.9	-24.8	-28.8	-33.9	-25.2	-27.7
Average daily room rate	\$121.86	\$125.11	\$119.40	\$93.23	\$98.00	\$101.94	\$110.2	\$115.50	\$109.47	\$103.15	\$101.56	\$99.89	\$112.25
Variance from 2019	-3.1%	-3.0%	-8.5%	-27.9%	-22.8%	-18.9%	-9.6%	-4.9%	-15.7%	-18.8%	-21.0%	-18.3%	-11.3%
Revenue per available room	\$52.98	\$66.08	\$34.71	\$10.82	\$15.63	\$23.30	\$29.41	\$39.23	\$33.03	\$26.88	\$23.55	\$19.32	\$31.91
Calgary Occupancy Rate	44.6%	52.2%	27.7%	9.1%	11.2%	17.7%	23.4%	29.2%	27.3%	22.5%	19.5%	14.8%	25.7%
Point change from 2019	-2.4	-1.7	-25.5	-48.1	-48.7	-51.4	-56.8	-46.9	-42.7	-35.4	-38.2	-28.5	-34.9
Average daily room rate	\$131.38	\$134.55	\$126.86	\$93.82	\$93.54	\$95.74	\$103.96	\$104.10	\$104.78	\$104.59	\$100.67	\$91.47	\$114.12
Variance from 2019	-3.7%	-1.6%	-5.4%	-31.6%	-35.3%	-36.8%	-41.2%	-25.5%	-29.1%	-27.9%	-29.8%	-27.2%	-21.3%
Revenue per available room	\$58.57	\$70.23	\$35.12	\$8.51	\$10.47	\$16.98	\$24.28	\$30.39	\$28.59	\$23.54	\$19.58	\$13.57	\$29.32

	Jan.	Feb.	Mar.	Apr.	May	June	July	August	Sept.	Oct.	Nov.	Dec.	Yr-to-Date
Alberta Resorts Occupancy Rate	50.1%	59.6%	26.5%	7.1%	16.3%	29.1%	50.2%	60.8%	47.5%	38.7%	30.2%	23.7%	38.7%
Point change from 2019	1.9	3.1	-33.0	-44.5	-51.1	-55.2	-42.3	-32.1	-38.1	-19.6	-17.6	-27.2	-28.1
Average daily room rate	\$239.13	\$244.52	\$232.94	\$100.79	\$100.54	\$212.77	\$274.27	\$293.97	\$270.72	\$232.09	\$204.40	\$226.12	\$241.76
Variance from 2019	12.4%	16.7%	10.4%	-49.8%	-60.9%	-44.0%	-38.0%	-32.9%	-33.5%	-14.0%	-3.7%	-26.7%	-24.1%
Revenue per available room	\$119.72	\$145.73	\$61.70	\$7.15	\$16.36	\$61.83	\$137.68	\$178.80	\$128.53	\$89.92	\$61.81	\$53.67	\$93.45
Other Alberta <sup>b</sup> Occupancy Rate	38.2%	45.0%	31.0%	15.1%	21.0%	28.5%	34.7%	41.1%	44.3%	38.6%	31.0%	21.0%	32.8%
Point change from 2019	-2.7	-2.6	-18.4	-30.6	-28.9	-25.7	-22.1	-15.8	-9.2	-11.5	-15.7	-13.2	-16.0
Average daily room rate	\$114.51	\$116.43	\$110.98	\$101.21	\$104.53	\$105.15	\$106.96	\$107.88	\$108.70	\$106.33	\$103.20	\$100.28	\$108.33
Variance from 2019	-1.2%	-1.2%	-4.3%	-12.7%	-10.8%	-11.4%	-12.8%	-10.9%	-7.5%	-7.6%	-11.5%	-10.7%	-7.8%
Revenue per available room	\$43.73	\$52.43	\$34.41	\$15.28	\$21.90	\$29.95	\$37.07	\$44.29	\$48.14	\$41.04	\$32.01	\$21.06	\$35.52
Total Alberta (excl. Resorts) Occupancy Rate	41.6%	49.4%	29.5%	12.5%	17.0%	23.9%	29.1%	35.5%	35.4%	30.3%	25.4%	18.7%	29.6%
Point change from 2019	-3.4	-2.6	-24.3	-40.6	-38.4	-36.8	-35.0	-27.0	-23.3	-23.4	-27.5	-21.1	-24.8
Average daily room rate	\$121.92	\$124.62	\$117.79	\$97.72	\$100.96	\$102.34	\$107.11	\$109.09	\$108.04	\$105.17	\$102.20	\$98.12	\$110.82
Variance from 2019	-2.6%	-1.8%	-6.4%	-23.0%	-21.7%	-22.4%	-24.9%	-14.7%	-17.7%	-17.8%	-20.7%	-18.0%	-14.2%
Revenue per available room	\$50.66	\$61.51	\$34.71	\$12.26	\$17.21	\$24.45	\$31.17	\$38.74	\$38.25	\$31.92	\$25.94	\$18.38	\$32.75

Sources: CBRE Hotels Trends in the Hotel Industry National Market Report.

Food Services and Drinking Places 2020 (\$ Millions) unadjusted <sup>6</sup>													
Total Receipts for Alberta	739.16r	752.61r	532.16r	344.93r	496.75r	651.67r	701.05r	720.13r	690.75r	676.26r	594.99p		627.31p
Per cent change from 2019	0.5%	6.7%	-35.5%	-56.5%	-41.9%	-24.7%	-21.2%	-19.4%	-16.9%	-19.9%	-27.4%		-23.8%

Historic Sites and Museums 2021 (000's of visitors) <sup>7</sup>													
Visitor Attendance <sup>8</sup>	0.0												0.0
Per cent change from 2020	-100.0%												-100.0%

Exchange Rates 2021 <sup>8</sup>													
Canadian Dollar / U.S. Dollar (noon)	0.79												0.79
Canadian Dollar / Euro	0.65												0.65
Canadian Dollar / British Pounds	0.58												0.58

Oil Price: Western Texas Intermediate (WTI) 2021 <sup>9</sup>													
Cushing, OK Spot Price (U.S. Dollar per barrel)	52.00												52.00

Major Tourism Projects Valued \$5 million or Greater 2021 (\$ Millions) <sup>10</sup>													
Total Value of Hotel Projects Inventory	\$301												\$301

Alberta Provincial Parks Campsite Reservations 2021 <sup>11</sup>													
Reservations made on Reserve.AlbertaParks.ca	62												62

Sources: Statistics Canada, Alberta Culture, Multiculturalism and Status of Women, Bank of Canada, WTI, Government of Alberta, Alberta Environment and Parks.

<sup>a</sup> Closed properties were not included. More reference can be found here: [https://ftlcollect.com/fr2/520/46295/CBRE\\_Hotels\\_Canadian\\_Hotel\\_Industry\\_Outlook.mp4](https://ftlcollect.com/fr2/520/46295/CBRE_Hotels_Canadian_Hotel_Industry_Outlook.mp4).

<sup>b</sup> Other Alberta includes Lethbridge, Red Deer and other Alberta communities.

<sup>c</sup> 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. 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>

**6. 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>

**7. 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.

**8. Exchange Rate** - This is the average monthly exchange rate.

Source: Bank of Canada.

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

**9. 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>

**10. 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/>

**11. 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.

February 2021