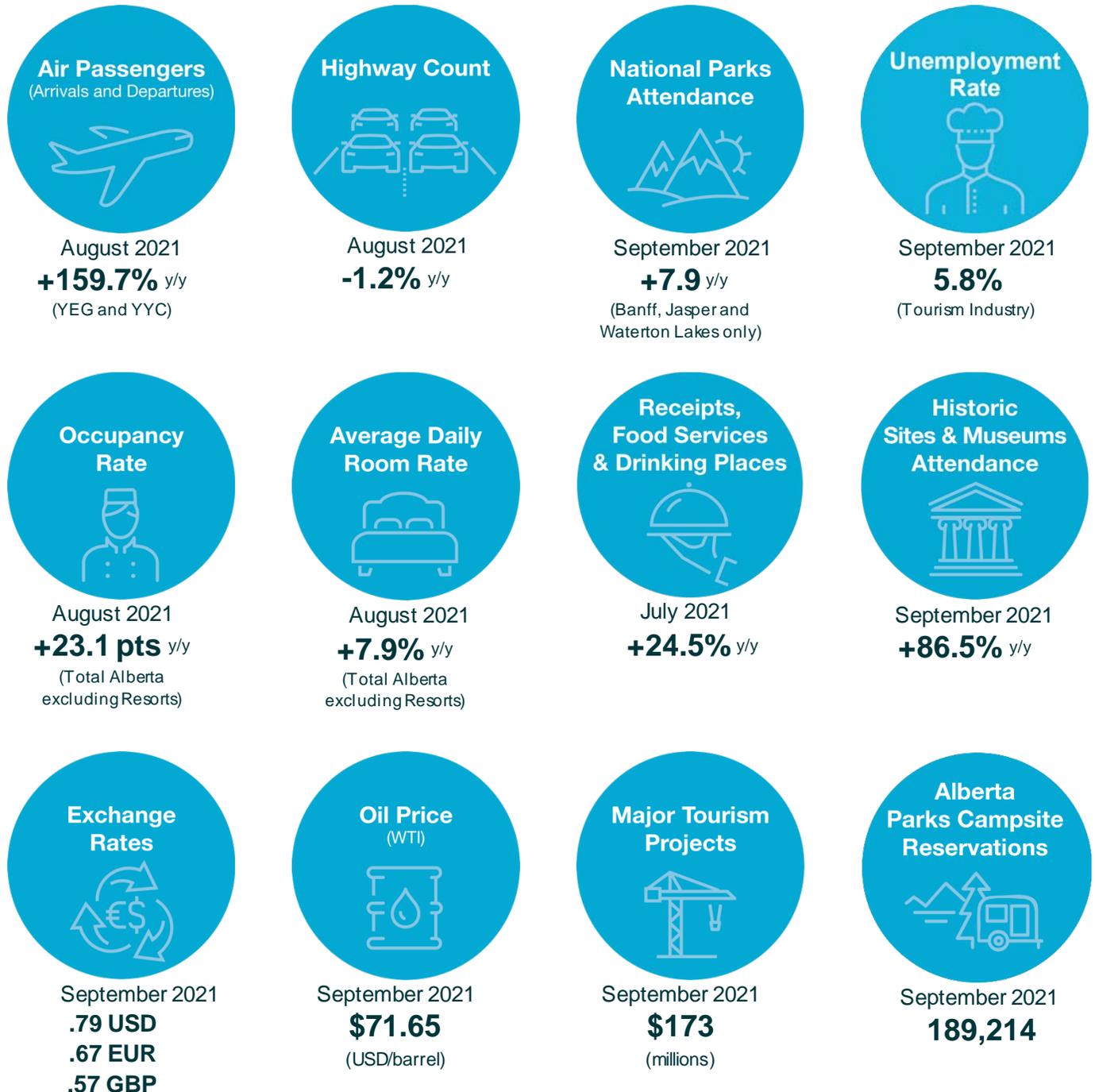


Alberta Tourism Market Monitor October 2021



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. Public health measures in effect at various times during 2020 and early 2021 led to travel restrictions, capacity-reducing health restrictions, and closures of national parks, historic sites, museums, and tourism-related businesses at various points during the pandemic. Alberta lifted most public health restrictions when we entered Stage 3 of the Open for Summer Plan on July 1, 2021. On September 15, 2021, Alberta declared a state of public health emergency. As of September 20, new public health measures are in effect provincially.

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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
Air Passengers 2021 (000's of arrivals and departures)¹													
Edmonton International Total	83.1p	64.2p	78.0p	77.6p	67.2p	115.2p	264.8p	371.4p					1,122.4p
Per cent change from 2020	-85.8%	-88.7%	-77.3%	251.2%	144.8%	100.3%	129.2%	167.2%					-39.6%
Domestic	80.5p	63.8p	78.0p	77.6p	67.2p	115.2p	264.8p	370.7p					1,118.9p
Per cent change from 2020	-81.5%	-85.0%	-71.3%	257.7%	148.6%	102.9%	130.0%	166.7%					-25.0%
Transborder	0.7p	0.0p					0.7p						
Per cent change from 2020	-99.2%	-100.0%	-100.0%	-100.0%	-100.0%	-100.0%	-100.0%	-100.0%					-99.7%
International	1.8p	0.4p	0.0p	0.0p	0.0p	0.0p	0.0p	0.7p					2.9p
Per cent change from 2020	-97.2%	-99.4%	-100.0%	n/a	n/a	n/a	n/a	n/a					-98.2%
Calgary International Total	256.2r	191.9r	222.6r	209.3	190.0p	319.1r	639.0r	954.6p					2,982.7p
Per cent change from 2020	-81.0%	-85.6%	-72.7%	207.5%	134.5%	124.1%	121.3%	156.8%					-33.0%
Domestic	206.7r	176.7r	210.0r	194.3	173.0p	298.9r	585.4r	871.1p					2,727.3p
Per cent change from 2020	-76.8%	-79.8%	-61.6%	194.1%	120.6%	116.0%	113.8%	143.4%					-15.7%
Transborder	29.9p	10.9p	9.4p	12.4p	13.5p	13.8p	28.4p	52.7p					171.0
Per cent change from 2020	-89.4%	-96.1%	-93.9%	654.1%	418.3%	244.9%	244.9%	479.9%					-77.0%
International	19.6p	4.3p	2.2r	2.6p	3.5p	6.4p	15.1p	30.8p					84.4p
Per cent change from 2020	-89.0%	-97.6%	-98.0%	648.4%	n/a	n/a	662.5%	554.1%					-82.1%
Fort McMurray International Total	12.2	11.4	13.7	12.8	11.0	15.6	24.4	30.8					131.8
Per cent change from 2020	-73.0%	-74.0%	-53.0%	226.0%	159.0%	99.0%	68.0%	82%					-20.0%
Highway Count 2021 (000's of vehicles)²													
Hwy 1 - Sask border w-bound	53.7	50.6	62.5	63.2	65.1	77.1	109.9	116.4					598.5
Per cent change from 2020	-6.3%	-16.0%	10.8%	51.3%	14.8%	11.0%	22.9%	16.2%					119.8%
Hwy 1 - Banff Pk Gate (2-way)	589.1	522.4	670.3	580.1	553.8	729.2	1,069.6	1,057.2					5,772
Per cent change from 2020	8.0%	-8.5%	54.2%	125.8%	23.4%	8.4%	5.2%	-5.0%					155.7%
Hwy 16 - Jasper Pk Gate (2-way)	104.1	96.2	135.2	135.7	139.5	160.2	248.4	259.3					1,278.5
Per cent change from 2020	4.3%	-8.1%	35.1%	86.4%	26.9%	3.2%	13.6%	2.8%					162.4%
Hwy 16 - Blackfoot w-bound	115.1	111.2	138.9	140.5	145.5	153.7	171.6	178.3					1,154.8
Per cent change from 2020	-18.7%	-22.0%	12.6%	58.9%	22.2%	10.2%	9.2%	7.8%					87.8%
National Park Attendance (000's of visitors) 2021³ Does not include group tours													
Banff ⁴	207.3	190.1	239.6	246.9	225.9	298.5	653.9	647.9	504.9				3,214.9
Per cent change from 2020	4.1%	-9.5%	54.3%	n/a	n/a	10.0%	12.5%	1.4%	8.5%				27.5%
Jasper	59.6	55.8	77.8	153.1	148.2	184.7	450.4	451.7	342.9				1,924.3
Per cent change from 2020	-2.9%	-7.2%	40.2%	n/a	n/a	4.7%	12.9%	2.0%	7.3%				27.0%
Waterton Lakes	15.3	11.1	16.9	20.3	42.4	81.0	118.2	108.2	68.6				481.9
Per cent change from 2020	44.3%	35.7%	97.2%	n/a	n/a	50.0%	4.3%	-10.1%	6.4%				27.0%
Elk Island	40.3	27.3	41.1	49.4	67.5	57.6	58.6	60.6	52.3				454.7
Per cent change from 2020	194.1%	72.4%	124.8%	n/a	n/a	10.2%	-28.2%	-24.4%	-4.5%				43.6%
Wood Buffalo	0.2	0.1	0.17	0.3	1.1	1.0	1.2	0.4	0.1				4.5
Per cent change from 2020	677.3%	0.9%	956.3%	n/a	n/a	695.2%	-19.2%	-70.5%	-78.5%				24.7%
Employment (000's of persons) 2021 Seasonally Adjusted⁴													
Accommodation and Food Services	85.3	104.5	104.3	100.4	95.3	127.3	126.5	131.8	129.1				111.6
Per cent change from 2020	-44.6%	-31.7%	-6.3%	31.2%	9.8%	29.5%	10.8%	11.6%	11.7%				-2.2%
Tourism Unemployment Rate 2021 Seasonally unadjusted⁵													
Tourism Unemployment Rate	22.6%	16.2%	13.1%	11.9%	8.8%	2.9%	2.9%	3.0%	5.8%				9.7%
Point change from 2020	18.6	11.1	-1.0	-11.9	-19.3	-22.9	-15.3%	-14.4%	-8.2				-7.0
Sources: Edmonton International Airport, Calgary International Airport, Fort McMurray International Airport, Alberta Transportation, Parks Canada and Statistics Canada.													
Accommodation Indices for Major Regions 2021⁶													
	Jan.	Feb.	Mar.	Apr.	May	June	July	August	Sept.	Oct.	Nov.	Dec.	Yr-to-Date
Edmonton Occupancy Rate	19.3%	22.6%	26.6%	27.2%	25.7%	31.1%	44.5%	55.5%					31.7%
Point change from 2020	-24.1	-30.2	-2.5	15.6	9.8	8.3	17.5	21.6					1.2
Average daily room rate	\$89.62	\$90.01	\$91.30	\$91.26	\$87.44	\$91.25	\$97.80	\$107.69					\$95.52
Variance from 2020	-26.5%	-27.3%	-23.6%	-2.1%	-10.8%	-10.5%	-11.7%	-6.8%					-17.5%
Revenue per available room	\$17.33	\$20.56	\$24.29	\$24.84	\$22.51	\$28.42	\$43.55	\$59.78					\$30.24
Calgary Occupancy Rate	14.3%	18.6%	22.4%	23.5%	19.7%	27.7%	52.4%	63.1%					30.3%
Point change from 2020	-30.1	-33.5	-5.3	14.3	8.5	10.2	29.0	33.8					2.0
Average daily room rate	\$93.03	\$100.26	\$104.74	\$106.33	\$110.16	\$108.44	\$130.55	\$129.64					\$116.92
Variance from 2020	-29.2%	-25.5%	-17.5%	10.5%	17.8%	10.5%	26.0%	25.0%					-2.2%
Revenue per available room	\$13.35	\$18.64	\$23.47	\$25.01	\$21.69	\$29.99	\$68.42	\$81.75					\$35.40

	Jan.	Feb.	Mar.	Apr.	May	June	July	August	Sept.	Oct.	Nov.	Dec.	Yr-to-date
Alberta Resorts Occupancy Rate	20.5%	33.0%	40.0%	28.8%	17.4%	30.4%	53.7%	63.9%					36.1%
Point change from 2020	-29.6	-26.6	15.3	21.8	0.5	0.6	2.3	2.0					-4.5
Average daily room rate	\$189.46	\$214.78	\$210.49	\$216.29	\$218.53	\$272.89	\$363.84	\$389.49					\$286.82
Variance from 2020	-20.7%	-12.2%	-5.6%	121.3%	128.2%	35.2%	37.6%	36.3%					18.1%
Revenue per available room	\$38.77	\$70.87	\$84.12	\$62.28	\$38.10	\$83.03	\$195.34	\$248.89					\$103.44
Other Alberta ^b Occupancy Rate	24.1%	29.6%	33.3%	32.1%	30.8%	38.5%	52.4%	58.3%					37.5%
Point change from 2020	-14.1	-15.5	2.5	16.9	8.8	9.6	17.6	17.0					5.3
Average daily room rate	\$103.13	\$105.23	\$104.31	\$103.84	\$102.04	\$104.97	\$113.70	\$114.99					\$107.88
Variance from 2020	-9.7%	-9.3%	-6.4%	2.6%	-2.5%	-0.8%	6.1%	6.5%					-1.7%
Revenue per available room	\$24.89	\$31.12	\$34.71	\$33.29	\$31.45	\$40.44	\$59.55	\$67.00					\$40.46
Total Alberta (excl. Resorts) Occupancy Rate	19.9%	24.4%	28.2%	28.2%	26.1%	33.3%	50.2%	58.9%					33.7%
Point change from 2020	-21.6	-24.9	-1.2	15.5	8.5	9.1	20.8	23.1					3.1
Average daily room rate	\$97.28	\$100.39	\$100.93	\$101.04	\$99.77	\$102.16	\$114.87	\$117.57					\$106.96
Variance from 2020	-20.1%	-19.3%	-14.4%	2.9%	-1.4%	-1.1%	7.0%	7.9%					-6.1%
Revenue per available room	\$19.36	\$24.50	\$28.48	\$28.49	\$26.08	\$34.03	\$57.65	\$69.21					\$36.10

Accommodation Indices for Selected Cities or Towns^c 2021⁷

Occ%= Occupancy Rate ADR= Average Daily Room Rate RevPar= Revenue Per Available Room	August			Year-To-Date				August			Year-To-Date		
	Occ%	ADR	RevPar	Occ%	ADR	RevPar		Occ%	ADR	RevPar	Occ%	ADR	RevPar
Airdrie	67.7	\$115.98	\$78.54	39.9	\$95.37	\$38.10	Banff	65.1	\$337.38	\$219.61	36.4	\$247.31	\$89.91
Bonnyville	60.1	\$83.30	\$50.05	36.8	\$81.53	\$29.97	Canmore	76.1	\$279.62	\$212.79	44.5	\$203.01	\$90.37
Drayton Valley	53.0	\$103.42	\$54.79	46.1	\$100.76	\$46.45	Drumheller	81.0	\$172.65	\$139.91	34.6	\$148.52	\$51.42
Edson	78.1	\$112.05	\$87.50	55.4	\$109.44	\$60.60	Fort Mac	45.9	\$133.38	\$61.21	40.4	\$128.22	\$51.76
Fort Saskatchewan	76.0	\$101.23	\$76.89	31.2	\$95.14	\$29.69	Gr. Prairie	57.2	\$121.50	\$69.45	41.6	\$121.14	\$50.37
High Level ^d	n/a	n/a	n/a	n/a	n/a	n/a	Hinton	79.8	\$149.88	\$119.54	44.9	\$117.51	\$52.76
Jasper	72.7	\$284.41	\$206.80	45.2	\$206.51	\$93.28	Leduc	46.0	\$82.61	\$38.03	26.6	\$79.71	\$21.18
Lethbridge	51.9	\$108.00	\$56.07	31.7	\$98.33	\$31.19	Lloydminster	48.8	\$109.13	\$53.27	34.2	\$105.80	\$36.23
Med. Hat	61.4	\$108.87	\$66.90	36.8	\$101.06	\$37.22	Nisku	51.3	\$85.22	\$43.68	29.0	\$77.81	\$22.58
Red Deer	50.4	\$99.03	\$49.96	26.6	\$93.29	\$24.81	Sherwood Pk.	59.0	\$95.98	\$56.60	33.6	\$89.85	\$30.19
Whitecourt	41.7	\$99.63	\$41.52	33.9	\$96.31	\$32.60	Total Alberta	59.7	\$152.15	\$90.82	34.5	\$130.18	\$44.90

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

Food Services and Drinking Places 2021 (\$ Millions) unadjusted⁸

Total Receipts for Alberta	475.90r	542.65r	689.21r	602.65r	585.70r	753.62r	871.72p						645.92p
Per cent change from 2020	-35.3%	-27.5%	29.8%	74.0%	18.1%	17.5%	24.5%						7.7%

Historic Sites and Museums 2021 (000's of visitors)⁹

Visitor Attendance ^a	0.0p	0.0p	0.0p	0.0p	0.0p	28.9p	132.3p	158.0p	61.4p				380.5p
Per cent change from 2020	-100.0%	-100.0%	-100.0%	-100.0%	-100.0%	31.5%	182.6%	227.5%	86.5%				41.2%

Exchange Rates 2021¹⁰

Canadian Dollar / U.S. Dollar (noon)	0.79	0.79	0.80	0.80	0.82	0.82	0.80	0.79	0.79				0.80
Canadian Dollar / Euro	0.65	0.65	0.67	0.67	0.68	0.68	0.68	0.67	0.67				0.67
Canadian Dollar / British Pounds	0.58	0.57	0.57	0.58	0.59	0.58	0.58	0.58	0.57				0.58

Oil Price: Western Texas Intermediate (WTI) 2021¹¹

Cushing, OK Spot Price (U.S. Dollar per barrel)	52.00	59.04	62.33	61.72	65.17	71.38	72.49	67.70	71.65				64.83
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Major Tourism Projects Valued \$5 million or Greater 2021 (\$ Millions)¹²

Total Value of Hotel Projects Inventory	\$301	\$301	\$289	\$255	\$255	\$255	\$255	\$233	\$173				\$173
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Alberta Provincial Parks Campsite Reservations 2021¹³

Reservations made on Reserve.AlbertaParks.ca	62	181	67,645	61,310	135,190	114,013	176,810	144,196	189,214				333,410
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Sources: Statistics Canada, Alberta Culture, Multiculturalism and Status of Women, Bank of Canada, WTI, Government of Alberta, Alberta Environment and Parks.

^a Year-over-year change for April and May in 2021 are not available since all national parks were closed in April and May 2020.

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

^c Per STR's data reporting guidelines, they only report properties as closed 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 property open for the full month. STR's full Data Reporting Guidelines are available here: https://str.com/sites/default/files/2019-11/str-data-reporting-guidelines-english_0.pdf.

^d Data for High Level in March is not available due to there being less than the required 4 reporting properties.

^e All historical sites and museums were closed effective Dec 13, 2020 due to provincewide mandatory restrictions.

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/Operations Report with reproduction and use of information subject to CBRE Limited Disclaimer / Terms of Use 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. Reproduction 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.

October 2021