

# Alberta Tourism

## Market Monitor September 2022



August 2022  
**+64.4%** y/y  
(YEG and YYC)



July 2022  
**+107.0%** y/y



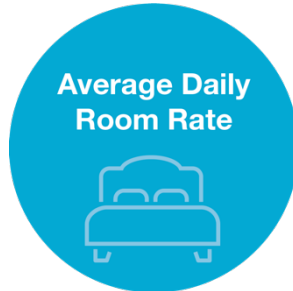
August 2022  
**+1.9%** y/y  
(Banff, Jasper and Waterton Lakes only)



August 2022  
**4.5%**  
(Tourism Industry)



July 2022  
**+18.2 pts** y/y  
(Total Alberta excluding Resorts)



July 2022  
**+36.0%** y/y  
(Total Alberta excluding Resorts)



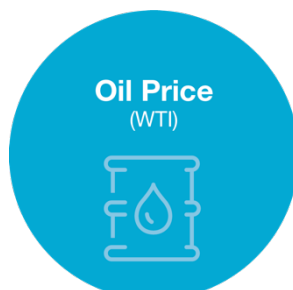
July 2022  
**+17.8%** y/y



August 2022  
**-3.3%** y/y



August 2022  
**.77 USD**  
**.76 EUR**  
**.65 GBP**



August 2022  
**\$93.67**  
(USD/barrel)



August 2022  
**\$87**  
(millions)



August 2022  
**32,028**

Please note: Alberta announced the first case of COVID-19 on March 5, 2020, and declared a state of public health emergency on March 17, 2020. Public health measures in effect at various times in 2020-2022 led to travel restrictions, capacity-reducing health restrictions, and closures of national parks, historic sites, museums, and tourism-related businesses. All provincial public health measures were lifted on June 14, 2022. ©2022 Government of Alberta | Published: September 2022 | For more information, email [tourism.research@gov.ab.ca](mailto:tourism.research@gov.ab.ca)

## 2022 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 2022 (000's of arrivals and departures)<sup>1</sup></b>													
Edmonton International Total	230.5p	241.2p	350.1p	410.7p	467.1p	505.2p	558.3p	597.9p					3361.0p
Per cent change from 2021	177.5%	275.5%	348.9%	429.4%	584.8%	338.6%	110.9%	61.0%					199.4%
Domestic	199.0p	202.1p	290.6p	335.9p	418.7p	462.5p	513.1p	553.1p					2973.0p
Per cent change from 2021	144.5%	216.6%	272.6%	333.0%	513.8%	301.5%	93.8%	49.2%					165.7%
Transborder	12.9p	17.5p	28.6p	41.8p	35.9p	32.6p	33.8p	33.3p					236.4p
Per cent change from 2021	1802.5%	n/a	n/a	n/a	n/a	n/a	n/a	n/a					34809.3%
International	20.6p	21.5p	30.9p	33.0p	12.6p	10.1p	11.5p	11.5p					151.8p
Per cent change from 2021	1019.0%	5326.2%	n/a	n/a	n/a	n/a	n/a	n/a					5146.7%
Calgary International Total	653.7p	697.5p	950.2p	1061.0p	1265.0p	1410.1p	1,551.3	1585.9p					9191.5p
Per cent change from 2021	155.1%	263.5%	326.8%	405.9%	565.7%	342.6%	142.8%	65.7%					207.9%
Domestic	475.4p	500.1p	664.1p	738.3p	958.1p	1066.7p	1,174.1	1210.4p					6791.8p
Per cent change from 2021	130.0%	183.0%	214.7%	279.1%	453.8%	257.5%	97.2%	38.5%					148.8%
Transborder	95.5p	116.8p	171.4p	202.5p	200.8p	233.1p	258.4	248.5p					1539.3p
Per cent change from 2021	220.0%	971.4%	1724.1%	1535.6%	1382.4%	1589.3%	808.5%	371.4%					800.0%
International	82.7p	80.6p	114.6p	120.2p	106.1p	110.3p	118.8	127.1p					860.4p
Per cent change from 2021	321.5%	1792.1%	5161.4%	4554.6%	2961.2%	1625.5%	687.4%	312.8%					919.9%
Fort McMurray International Total	18.2	18.6	22.9	23.9	28.0	30.1	30.6	31.9					204.2
Per cent change from 2021	50%	64%	67%	87%	153%	92%	26%	4%					55%
<b>Highway Count 2022 (000's of vehicles)<sup>2</sup></b>													
Hwy 1 - Sask border w-bound	57.0	60.1	70.9	73.7	83.5	89.5	115.3						550.0
Per cent change from 2021	6.3%	18.7%	13.5%	16.5%	28.3%	16.0%	4.9%						14.1%
Hwy 1 - Banff Pk Gate (2-way)	592.7	597.8	652.9	626.5	719.9	782.6	2,756.3						6,728.7
Per cent change from 2021	0.6%	14.4%	-2.6%	8.0%	30.0%	7.3%	157.7%						42.7%
Hwy 16 - Jasper Pk Gate (2-way)	104.6	112.1	132.3	141.5	167.1	187.5	260.4						1,105.6
Per cent change from 2021	0.5%	16.5%	-2.1%	4.3%	19.8%	17.1%	4.8%						8.5%
Hwy 16 - Blackfoot w-bound	123.5	130.1	149.3	157.6	170.3	169.2	179.6						1,079.6
Per cent change from 2021	7.4%	17.0%	7.5%	12.1%	17.0%	10.1%	4.6%						10.6%
<b>National Park Attendance (000's of visitors) 2022<sup>3</sup> Does not include group tours</b>													
Banff	210.3	216.4	239.5	278.5	321.1	361.7	694.1	685.4					3,007.0
Per cent change from 2021	1.5%	13.8%	0.0%	12.8%	42.1%	21.2%	6.2%	5.8%					45.8%
Jasper	61.1	64.9	75.5	168.2	196.8	221.4	475.3	437.3					1,700.4
Per cent change from 2021	2.4%	16.2%	-3.0%	9.9%	32.8%	19.9%	5.5%	-3.2%					50.5%
Waterton Lakes	9.8	10.8	11.5	14.3	38.6	66.7	113.1	107.8					372.5
Per cent change from 2021	-35.7%	-2.9%	-32.1%	-29.6%	-8.9%	-17.7%	-4.3%	-0.4%					22.1%
Elk Island	18.2	16.8	17.5	29.3	47.2	46.1	61.7	56.1					293.0
Per cent change from 2021	-54.7%	-38.5%	-57.5%	-40.7%	-30.0%	-19.9%	5.4%	-7.5%					-14.3%
Wood Buffalo	0.0	0.0	0.0	0.0	0.3	0.3	0.5	0.5					1.6
Per cent change from 2021	-100.0%	-100.0%	-100.0%	-100.0%	-76.0%	-66.6%	-55.5%	23.8%					-11.3%
<b>Employment (000's of persons) 2022 Seasonally Adjusted<sup>4</sup></b>													
Accommodation and Food Services	125.3	129.5	134.2	135.3	139.3	137.0	139.3	132					134.0
Per cent change from 2021	46.5%	22.6%	28.4%	33.3%	45.9%	9.3%	10.5%	1.3%					26.3%
<b>Tourism Unemployment Rate 2022 Seasonally unadjusted<sup>5</sup></b>													
Tourism Unemployment Rate	5.6%	4.0%	5.9%	4.9%	4.8%	3.6%	5.3%	4.5%					4.8%
Point change from 2021	-17.0	-12.2	-7.2	-7.0	-4.0	0.7	2.4	1.5					-6.3
<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 2022<sup>6</sup></b>													
	Jan.	Feb.	Mar.	Apr.	May	June	July	August	Sept.	Oct.	Nov.	Dec.	Yr-to-Date
Edmonton Occupancy Rate	30.9%	39.0%	51.4%	55.6%	56.5%	54.7%	62.0%						50.1%
Point change from 2021	11.8	16.6	25.0	28.7	31.4	23.8	17.1						22.1
Average daily room rate	\$102.84	\$107.38	\$117.21	\$120.56	\$128.64	\$128.54	\$128.04						\$121.02
Variance from 2021	14.8%	18.0%	28.5%	32.2%	44.4%	40.8%	28.6%						30.5%
Revenue per available room	\$31.76	\$41.86	\$60.27	\$67.00	\$72.68	\$70.32	\$79.35						\$60.67
Calgary Occupancy Rate	28.1%	38.0%	47.0%	57.7%	62.6%	72.2%	83.2%						55.7%
Point change from 2021	13.7	19.4	24.6	34.0	42.4	44.5	30.8						30.0
Average daily room rate	\$116.93	\$123.81	\$117.21	\$135.14	\$143.97	\$158.64	\$207.33						\$153.69
Variance from 2021	25.7%	23.5%	28.5%	26.4%	28.8%	46.2%	58.8%						36.3%
Revenue per available room	\$32.84	\$47.02	\$60.27	\$77.95	\$90.18	\$114.51	\$172.59						\$85.60

	Jan.	Feb.	Mar.	Apr.	May	June	July	August	Sept.	Oct.	Nov.	Dec.	Yr-to-Date
Alberta Resorts Occupancy Rate	34.1%	50.1%	57.4%	49.3%	54.7%	73.3%	80.6%						57.2%
Point change from 2021	13.7	17.1	17.5	20.3	37.3	42.7	26.7						25.0
Average daily room rate	\$249.82	\$276.46	\$269.45	\$268.62	\$332.32	\$471.83	\$575.04						\$378.06
Variance from 2021	31.6%	28.7%	28.1%	25.2%	52.1%	71.6%	57.8%						46.5%
Revenue per available room	\$85.27	\$138.52	\$154.72	\$132.45	\$181.78	\$345.90	\$463.48						\$216.11
Other Alberta <sup>a</sup> Occupancy Rate	38.0%	46.5%	50.2%	47.8%	51.2%	57.0%	63.0%						50.6%
Point change from 2021	13.9	17.0	17.0	15.8	20.5	18.4	10.7						16.2
Average daily room rate	\$111.88	\$113.91	\$115.98	\$114.36	\$117.43	\$120.38	\$130.74						\$118.71
Variance from 2021	8.6%	8.2%	11.4%	10.1%	15.2%	14.9%	15.2%						12.0%
Revenue per available room	\$42.49	\$52.98	\$58.22	\$54.67	\$60.16	\$68.63	\$82.32						\$60.11
Total Alberta (excl. Resorts) Occupancy Rate	33.1%	41.9%	49.6%	52.9%	56.0%	60.6%	68.4%						51.9%
Point change from 2021	13.3	17.5	21.5	24.8	29.9	27.4	18.2						21.9
Average daily room rate	\$110.63	\$114.69	\$120.21	\$122.71	\$129.21	\$135.43	\$156.39						\$130.04
Variance from 2021	13.8%	14.3%	19.2%	21.3%	28.4%	32.7%	36.0%						24.9%
Revenue per available room	\$36.59	\$48.03	\$59.66	\$64.92	\$72.39	\$82.13	\$106.99						\$67.52

#### Accommodation Indices for Selected Cities or Towns<sup>b</sup> 2022<sup>7</sup>

Occ%= Occupancy Rate Room Rate Available Room	July			Year-To-Date				July			Year-To-Date		
	Occ%	ADR	RevPar	Occ%	ADR	RevPar		Occ%	ADR	RevPar	Occ%	ADR	RevPar
Airdrie	78.5	\$165.39	\$129.77	48.5	\$121.64	\$59.04	Banff & Lake Louise	79.8	\$522.92	\$417.04	60.5	\$339.82	\$205.44
Bonnyville	60.1	\$99.18	\$59.58	49.5	\$92.48	\$45.75	Canmore	80.5	\$376.07	\$302.84	61.6	\$232.31	\$143.13
Drayton Valley	51.6	\$120.71	\$62.32	63.4	\$109.63	\$69.53	Drumheller	87.0	\$183.35	\$159.43	52.9	\$142.10	\$75.23
Edson	68.1	\$124.30	\$84.59	65.4	\$119.42	\$78.14	Fort Mac	36.9	\$135.84	\$50.10	40.9	\$132.35	\$54.07
Fort Saskatchewan	27.5	\$109.22	\$29.99	35.4	\$104.96	\$37.15	Gr. Prairie	59.0	\$126.11	\$74.37	55.6	\$126.94	\$70.62
High Level <sup>c</sup>	n/a	n/a	n/a	n/a	n/a	n/a	Hinton	91.5	\$199.67	\$182.71	55.3	\$135.73	\$75.03
Jasper	79.6	\$417.69	\$332.53	56.0	\$279.24	\$156.25	Leduc	58.9	\$94.39	\$55.63	47.2	\$85.97	\$40.60
Lethbridge	62.1	\$121.83	\$75.62	52.9	\$116.23	\$61.46	Lloydminster	53.5	\$122.90	\$65.80	48.6	\$118.70	\$57.64
Med. Hat	89.8	\$122.41	\$109.97	57.8	\$108.53	\$62.75	Nisku	73.1	\$104.78	\$76.61	50.5	\$93.97	\$47.49
Red Deer	58.3	\$111.51	\$64.96	44.6	\$108.47	\$48.37	Sherwood Pk.	58.0	\$112.98	\$65.56	50.1	\$103.98	\$52.12
Whitecourt	52.0	\$104.53	\$54.35	52.8	\$99.43	\$52.52	Total Alberta	69.5	\$206.74	\$143.74	53.1	\$158.93	\$84.34

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

#### Food Services and Drinking Places 2022 (\$ Millions) unadjusted<sup>8</sup>

Total Receipts for Alberta	669.70r	724.15r	863.82r	853.96r	931.84r	953.94r	1011.49p						858.41p
Per cent change from 2021	39.3%	32.8%	24.6%	41.3%	58.5%	26.7%	17.8%						47.4%

#### Historic Sites and Museums 2022 (000's of visitors)<sup>9</sup>

Visitor Attendance <sup>d</sup>	9.3p	25.9p	32.9p	41.5p	65.7p	127.2p	170.8r						627.9p
Per cent change from 2021	n/a	n/a	n/a	n/a	n/a	119.9%	26.9%						289.7%

#### Exchange Rates 2022<sup>10</sup>

Canadian Dollar / U.S. Dollar (noon)	0.79	0.79	0.79	0.79	0.78	0.78	0.77	0.77					0.78
Canadian Dollar / Euro	0.70	0.69	0.72	0.73	0.74	0.74	0.76	0.76					0.73
Canadian Dollar / British Pounds	0.58	0.58	0.60	0.61	0.63	0.63	0.64	0.65					0.62

#### Oil Price: Western Texas Intermediate (WTI) 2022<sup>11</sup>

Cushing, OK Spot Price (U.S. Dollar per barrel)	83.22	91.64	108.5	101.78	109.55	114.84	101.62	93.67					100.60
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#### Major Tourism Projects Valued \$5 million or Greater 2022 (\$ Millions)<sup>12</sup>

Total Value of Hotel Projects Inventory	\$208	\$208	\$208	\$208	\$208	\$202	\$87	\$87					\$87
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#### Alberta Provincial Parks Campsite Reservations 2022<sup>13</sup>

Reservations made on Reserve.AlbertaParks.ca	3,759	12,661	27,955	42,763	48,121	41,196	40,703	32,028					249,186
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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.

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

<sup>b</sup> 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](https://str.com/sites/default/files/2019-11/str-data-reporting-guidelines-english_0.pdf).

<sup>c</sup> Data for High Level is not available due to there being less than the required 4 reporting properties.

<sup>d</sup> All historical sites and museums were closed on Dec 13, 2020 due to province-wide public health restrictions. Historical sites and museums reopened on June 10, 2021.

**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/tb1/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. 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/tb1/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.