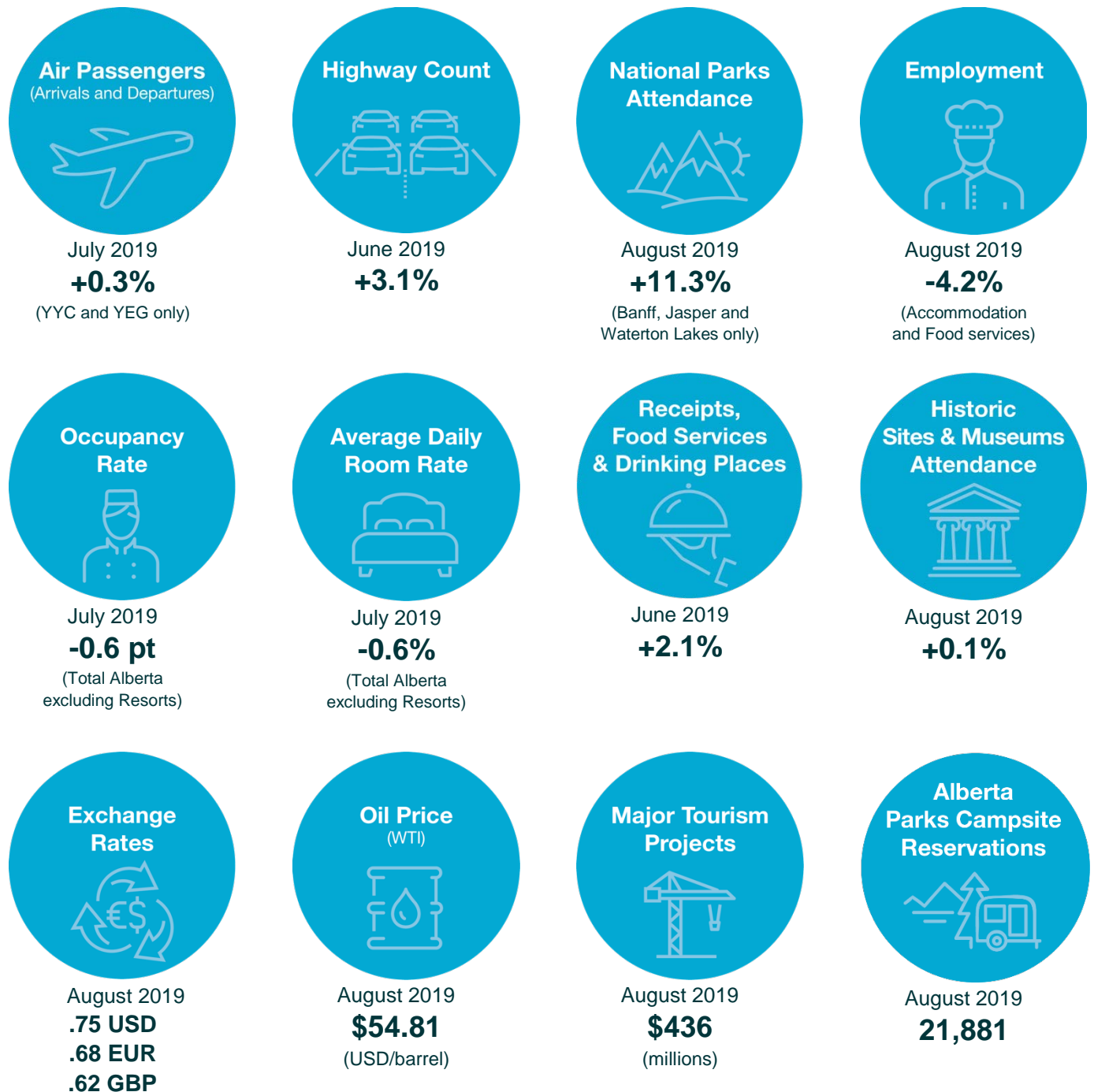


# Alberta Tourism Market Monitor September 2019



2019 Alberta Tourism Market Monitor													
Alberta Economic Development, Trade and Tourism													
	Jan.	Feb.	Mar.	Apr.	May	June	July	August	Sept.	Oct.	Nov.	Dec.	Yr-to-Date
<b>Air Passengers 2019 (000's of arrivals and departures) <sup>1</sup></b>													
Edmonton International Total	615.7p	602.7p	657.2p	634.7p	639.1p	634.7p	702.2p						4,490.8p
Per cent change from 2018	1.4%	2.0%	3.5%	-1%	-3.0%	-0.4%	-3.5%						-0.2%
Domestic	460.2p	444.1p	491.9p	491.4p	541.0p	556.2p	629.3p						3,614.2p
Per cent change from 2018	0.8%	0.6%	3.0%	-0.3%	-2.8%	0.6%	-2.0%						-0.2%
Transborder	96.4p	101.4p	104.1p	91.0p	72.2p	59.7p	58.2p						582.9p
Per cent change from 2018	9.7%	11.2%	9.3%	0.8%	-2.8%	-8.0%	-14.2%						2.0%
International	59.2p	56.7p	61.2p	52.3p	26.0p	18.8p	19.7p						293.8p
Per cent change from 2018	-5.5%	-1.9%	-1.1%	-4.8%	-7.2%	-2.4%	-14.1%						-4.4%
Calgary International Total	1,374.9p	1,330.5p	1,472.9r	1,402.7p	1,445.5r	1,561.6p	1,756.4p						10,346.3p
Per cent change from 2018	5.7%	5.5%	4.5%	3.5%	3.5%	3.8%	2.2%						4.1%
Domestic	926.7p	879.1p	962.5r	941.4p	1,043.4r	1,102.2p	1,264.8p						7,122.1p
Per cent change from 2018	7.7%	5.8%	4.7%	3.5%	3.6%	1.1%	-1.2%						3.3%
Transborder	264.7p	272.4p	316.6p	287.8p	269.0p	305.2p	330.7p						2,046.4p
Per cent change from 2018	4%	5.3%	6.0%	3.7%	2.2%	5.9%	9.7%						5.4%
International	183.5p	178.9p	193.7p	173.5p	133.0r	154.2p	160.9p						1,177.8p
Per cent change from 2018	-1.2%	4.7%	1.4%	3.3%	8.0%	22.1%	17.9%						6.9%
Fort McMurray International Total	48.9	47.3	50.0	50.5	50.8								247.6
Per cent change from 2018	-8.3%	-8.3%	-11.8	-4.7%	-7.9%								-8.3%
<b>Highway Count 2019 (000's of vehicles) <sup>2</sup></b>													
Hwy 1 - Sask border w-bound	58.2	52.9	64.9	71.6	79.5	86.1							413.1
Per cent change from 2018	-1.9%	-6.5%	-0.7%	2.5%	-1.9%	-0.4%							-1.3%
Hwy 1 - Banff Pk Gate (2-way)	572.1	460.8	631.0	601.2	711.2	832.3							3808.6
Per cent change from 2018	3.3%	-5.4%	6.5%	2.3%	-3.1%	4.4%							1.5%
Hwy 16 - Jasper Pk Gate (2-way)	98.6	81.4	131.2	140.3	188.2	194.6							834.3
Per cent change from 2018	6.8%	-3.1%	14.9%	11.9%	11.0%	5.9%							8.5%
Hwy 16 - Blackfoot w-bound	146.8	133.8	162.5	165.3	178.5	169.2							956.1
Per cent change from 2018	-1.5%	-5.3%	2.7%	2.4%	-0.2%	-4.0%							-0.9%
<b>National Park Attendance (000's of visitors) 2019 <sup>3</sup> Does not include group tours</b>													
Banff	208.1	177.9	236.8	262.1	317.8	389.1	688.5	723.8					3,004.1
Per cent change from 2018	2.2%	-4.5%	3.4%	4.6%	-0.5%	5.1%	1.0%	12.6%					4.2%
Jasper	56.0	47.9	76.3	167.0	203.9	237.9	468.4	495.7					1,753.1
Per cent change from 2018	6.8%	-3.0%	13.8%	13.3%	2.9%	6.7%	0.0%	7.6%					5.2%
Waterton Lakes*	8.3	6.1	10.9	15.4	36.0	76.6	105.0	103.9					362.3
Per cent change from 2018	15.1%	2.8%	21.4%	18.8%	-12.1%	15.7%	2.4%	21.3%					9.6%
Elk Island	14.0	9.3	20.1	27.0	47.4	52.2	60.5	61.1					291.6
Per cent change from 2018	-7.2%	-37.7%	9.9%	15.6%	-9.3%	14.0%	8.2%	9.2%					3.6%
Wood Buffalo	0.03	0.11	0.03	0.16	0.69	0.91	0.99	1.13					4.03
Per cent change from 2018	28.6%	269.0%	-64.9%	243.5%	135.3%	139.4%	28.7%	108.3%					87.1%
<b>Employment (000's of persons) 2019 Seasonally Adjusted <sup>4</sup></b>													
Accommodation and Food Services	144.2	146.9	148.9	144.5	140.9	147.7	136.7	140.4					143.8
Per cent change from 2018	-3.7%	-1.1%	0.5%	-1.0%	-4.3%	2.6%	-6.6%	-4.2%					-2.2%
<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 2019 <sup>5</sup></b>													
	Jan.	Feb.	Mar.	Apr.	May	June	July	August	Sept.	Oct.	Nov.	Dec.	Yr-to-Date
Edmonton Occupancy Rate	48.3%	55.9%	60.6%	59.6%	58.6%	61.0%	57.5%						57.4%
Point change from 2018	0.7	0.1	-1.1	-5.4	-4.5	2.2	1.6						-0.9
Average daily room rate	\$125.44	\$128.51	\$129.38	\$128.79	\$126.62	\$125.26	\$122.2						\$126.60
Variance from 2018	-1.2%	-1.0%	-1.9%	0.8%	-4.0%	-4.2%	-1.4%						-2.0%
Revenue per available room	\$60.56	\$71.90	\$78.41	\$76.82	\$74.21	\$76.39	\$70.23						\$72.64
Calgary Occupancy Rate	47.0%	53.9%	53.1%	57.2%	59.9%	69.4%	80.3%						60.2%
Point change from 2018	0.9	0.9	-2.6	-4.6	-3.7	-4.1	-1.0						-2.1
Average daily room rate	\$136.31	\$136.54	\$134.15	\$137.29	\$145.21	\$151.39	\$178.21						\$148.82
Variance from 2018	2.5%	0.8%	-1.6%	-3.4%	-0.9%	-0.8%	0.6%						-0.5%
Revenue per available room	\$64.05	\$73.66	\$71.29	\$78.50	\$86.99	\$105.04	\$143.09						\$89.13
Alberta Resorts Occupancy Rate	48.7%	57.6%	59.5%	51.5%	67.3%	84.4%	93.0%						65.5%
Point change from 2018	3.1	4.9	2.4	-0.6	-2.5	-0.9	0.4						0.5
Average daily room rate	\$213.63	\$210.02	\$210.49	\$201.69	\$257.25	\$380.01	\$445.72						\$293.21
Variance from 2018	6.1%	-3.0%	-1.0%	5.6%	5.2%	7.0%	5.8%						3.6%
Revenue per available room	\$103.96	\$120.93	\$125.30	\$103.85	\$173.23	\$320.56	\$414.37						\$192.20

	Jan.	Feb.	Mar.	Apr.	May	June	July	August	Sept.	Oct.	Nov.	Dec.	Yr-to-Date
Other Alberta** Occupancy Rate	40.8%	47.7%	49.6%	45.8%	49.7%	54.1%	56.6%						49.2%
Point change from 2018	0.5	1.3	1.7	1.3	0.0	-3.5	-1.7						0.0
Average daily room rate	\$116.02	\$117.88	\$116.37	\$116.17	\$117.34	\$118.95	\$122.96						\$118.11
Variance from 2018	-1.8%	-1.4%	-1.8%	-0.8%	0.0%	-0.8%	-1.4%						-1.2%
Revenue per available room	\$47.29	\$56.20	\$57.68	\$53.15	\$58.30	\$64.39	\$70.23						\$58.11
Total Alberta (excl. Resorts) Occupancy Rate	44.6%	51.8%	53.6%	53.0%	55.2%	60.6%	63.8%						54.7%
Point change from 2018	0.6	0.8	-0.3	-2.1	-2.2	-2.1	-0.6						-0.8
Average daily room rate	\$125.11	\$126.79	\$125.72	\$126.94	\$129.08	\$131.88	\$143.29						\$130.40
Variance from 2018	-0.2%	-0.6%	-1.9%	-1.3%	-1.6%	-1.6%	-0.6%						-1.1%
Revenue per available room	\$55.86	\$65.67	\$67.44	\$67.27	\$71.20	\$79.89	\$91.46						\$71.36

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

#### Food Services and Drinking Places 2019 (\$ Millions) unadjusted<sup>6</sup>

Total Receipts for Alberta	711.09r	669.66r	789.37r	780.59r	820.75r	839.52p							768.50p
Per cent change from 2018	2.8%	1.0%	2.5%	4.0%	3.3%	2.1%							2.7%

#### Historic Sites and Museums 2019 (000's of visitors)<sup>7</sup>

Visitor Attendance***	37.0p	60.5p	63.0p	68.0p	66.6p	141.9r	210.6p	214.6p					862.2
Per cent change from 2018	22.3%	-12.6%	21.7%	33.1%	3.5%	5.9%	0.2%	0.1%					3.5%

#### Exchange Rates 2019<sup>8</sup>

Canadian Dollar / U.S. Dollar (noon)	0.75	0.76	0.75	0.75	0.74	0.75	0.76	0.75					0.75
Canadian Dollar / Euro	0.66	0.67	0.66	0.67	0.66	0.67	0.68	0.68					0.67
Canadian Dollar / British Pounds	0.58	0.58	0.57	0.57	0.58	0.61	0.61	0.62					0.59

#### Oil Price: Western Texas Intermediate (WTI) 2019<sup>9</sup>

Cushing, OK Spot Price (U.S. Dollar per barrel)	51.38	54.95	58.15	63.86	60.83	54.66	57.35	54.81					57.00
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#### Major Tourism Projects Valued \$5 million or Greater 2019 (\$ Millions)<sup>10</sup>

Total Value of Hotel Projects Inventory	\$463	\$463	\$463	\$437	\$414	\$414	\$414	\$436					\$436
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#### Alberta Provincial Parks Campsite Reservations<sup>11</sup>

Reservations made on Reserve.AlbertaParks.ca	N/A	11,598	18,284	29,078	40,893	32,632	34,008	21,881					158,492
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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.

\*Waterton Lakes National Park was closed to the public from September 8 - 20, 2017, due to a wildfire. Some sites in the park remain closed to date. Red Rock and Cameron are open to foot traffic and pedal bikes.

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

\*\*\* The Royal Alberta Museum (RAM) opened on October 3, 2018. While the visitation numbers from October onwards include the RAM, the percentage change numbers in 2019 exclude visitors to the RAM, in order to be comparable to 2018.

**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.

**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.

**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.

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

Source: Cushing, OK WTI Spot Price FOB.

**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 2020