

2004 Alberta Tourism Market Monitor

Alberta Economic Development

| | Jan. | Feb. | Mar. | Apr. | May | June | July | August | Sept. | Oct. | Nov. | Dec. | Yr-to-Date |
|---|---------|---------|---------|---------|---------|---------|---------|---------|---------|----------|----------|----------|------------|
| Entries into CANADA by Country of Residence (000's of trips) | | | | | | | | | | | | | |
| United States | 1,833.6 | 2,044.6 | 2,177.0 | 2,303.4 | 2,905.5 | 3,716.0 | 4,976.5 | 4,607.0 | 3,221.5 | 2,605.1p | 2,076.7p | 2,159.1p | 32,467.0p |
| Per cent change | -16.8% | -4.6% | -4.5% | 4.4% | 1.8% | 2.3% | 3.3% | -7.7% | 5.2% | -4.5% | -8.6% | -7.1% | -2.2% |
| Total Other International (n/incl US) | 171.7 | 188.6 | 200.6 | 243.4 | 379.6 | 486.2 | 639.7 | 582.7 | 515.1 | 373.4p | 176.6p | 238.8p | 3,957.7p |
| Per cent change | -7.9% | -1.4% | 1.9% | 19.6% | 56.0% | 34.5% | 31.8% | 25.3% | 31.4% | 39.5% | 9.5% | 9.2% | 25.5% |
| United Kingdom | 32.9 | 43.5 | 45.0 | 49.6 | 79.6 | 103.6 | 128.7 | 107.7 | 102.1 | 37.8p | 30.6p | 55.3p | 846.7p |
| Per cent change | -10.3% | -5.8% | 1.7% | 0.1% | 36.1% | 23.7% | 34.4% | 15.2% | 24.7% | 32.5% | 1.2% | 7.1% | 17.1% |
| Germany | 8.6 | 11.1 | 11.8 | 15.0 | 31.3 | 36.9 | 54.2 | 49.9 | 50.4 | 27.2p | 10.0p | 12.0p | 318.3p |
| Per cent change | -17.4% | -3.3% | -1.6% | 16.9% | 26.3% | 21.8% | 26.8% | 13.7% | 18.7% | 42.4% | 3.1% | 0.4% | 17.2% |
| Japan | 14.0 | 19.9 | 22.2 | 24.7 | 39.3 | 46.4 | 49.6 | 50.9 | 66.2 | 61.1p | 22.0p | 20.8p | 437.2p |
| Per cent change | -14.9% | 8.8% | -14.3% | 33.7% | 173.0% | 172.1% | 118.4% | 69.8% | 75.5% | 65.3% | 31.9% | 8.2% | 59.6% |

| | | | | | | | | | | | | | |
|--|--------|-------|-------|-------|-------|-------|-------|-------|-------|--------|-------|-------|--------|
| Alberta Direct Entries (000's of trips) | | | | | | | | | | | | | |
| U.S. Residents | 22.9 | 27.2 | 35.4 | 31.2 | 41.8 | 77.1 | 125.7 | 95.1 | 64.5 | 44.6p | 34.6p | 39.4p | 640.1p |
| Per cent change | -12.0% | -1.8% | -0.7% | 4.7% | 4.9% | -1.8% | 10.4% | 5.5% | 28.3% | 32.3% | 23.4% | 1.0% | 8.0% |
| Other Countries | 14.0 | 16.6 | 16.3 | 11.5 | 22.7 | 28.7 | 46.7 | 37.5 | 31.9 | 24.0p | 7.9p | 15.4p | 273.3p |
| Per cent change | -5.3% | -3.0% | -3.5% | -9.4% | 36.7% | 15.5% | 41.8% | 43.7% | 48.5% | 103.9% | 34.5% | 1.6% | 26.3% |

| | | | | | | | | | | | | | |
|--|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|--------|--------|----------|
| Air Passengers (000's of enplanements and deplanements) | | | | | | | | | | | | | |
| Edmonton International | 325.3 | 325.8 | 339.5 | 325.7 | 317.6 | 322.7 | 367.8 | 395.2 | 337.0 | 318.1 | 328.1p | 378.8p | 4,081.6p |
| Per cent change | 7.7% | 10.7% | 8.0% | 8.6% | 7.5% | 2.8% | 0.8% | 2.2% | 6.3% | -4.0% | 4.7% | 8.4% | 5.1% |
| Calgary International | 676.1 | 691.3 | 723.7 | 724.6 | 717.5 | 782.0 | 912.0 | 906.9 | 802.1 | 794.4 | 663.3p | 779.0p | 9,172.8p |
| Per cent change | 3.9% | 5.2% | 2.0% | 11.5% | 5.5% | 8.0% | 5.0% | 1.9% | 13.0% | 10.7% | 9.6% | 8.9% | 7.0% |

| | | | | | | | | | | | | | |
|--|-------|--------|-------|-------|-------|-------|-------|-------|-------|--------|--------|--------|----------|
| Highway Count (000's of vehicles) | | | | | | | | | | | | | |
| Hwy 1 -Sask border w-bound | 44.4 | 49.7 | 55.9 | 66.0 | 66.2 | 69.6 | 100.5 | 97.7 | 72.2 | 69.7p | 57.9p | 64.7p | 814.4p |
| Per cent change | -5.3% | 8.3% | 7.3% | 9.6% | 2.2% | -7.6% | 3.9% | -2.3% | 4.6% | 3.4% | 5.8% | 3.6% | 2.4% |
| Hwy 1 - Banff Pk Gate (2-way) | 324.5 | 389.6 | 407.2 | 454.7 | 462.6 | 496.6 | 726.5 | 711.4 | 530.1 | 422.0p | 347.2p | 401.8p | 5,674.4p |
| Per cent change | -5.1% | 11.8%e | 3.3%e | 11.9% | 1.2% | -1.3% | 6.2% | -2.2% | 10.9% | 0.0% | 9.0% | -0.2% | 3.5% |
| Hwy 16 - Jasper Pk Gate (2 way) | 62.6 | 71.5 | 84.6 | 99.6 | 108.6 | 116.0 | 179.7 | 180.1 | 117.3 | 91.0p | 66.5p | 82.7p | 1,260.0p |
| Per cent change | -3.5% | 12.5% | 2.8% | 1.2% | 4.2% | -4.9% | 4.5% | 18.9% | 5.6% | -5.1% | 8.5% | 3.1% | 4.4% |
| Hwy 16 - Jct #897 w-bound | 108.9 | 118.1 | 129.2 | 139.4 | 142.1 | 144.7 | 161.9 | 162.1 | 141.5 | 142.4p | 135.5p | 135.2p | 1,661.2p |
| Per cent change | 1.5% | 15.1% | 11.6% | 10.8% | 7.4% | 3.3% | 3.6% | 1.2% | 4.2% | -1.3% | 4.6% | 0.2% | 4.8% |

Note: Entries into Canada by residents of countries other than the US include direct entries and entries via the US.

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|------------------------------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|------------|
| Accommodation Indices | | | | | | | | | | | | | |
| Edmonton Occupancy Rate | 52.2% | 64.3% | 67.5% | 65.8% | 63.8% | 62.1% | 66.9% | 67.6% | 64.4% | 61.6% | 66.8% | 47.6% | 62.0% |
| Per cent change | 10.1% | -6.6% | 5.1% | 0.9% | 0.1% | -1.4% | 6.0% | 2.0% | 7.3% | -1.0% | -1.2% | 1.5% | 1.6% |
| Average Daily Room Rate | \$ 97.29 | \$ 98.07 | \$ 99.18 | \$ 103.55 | \$ 100.25 | \$ 100.90 | \$ 101.35 | \$ 101.55 | \$ 104.11 | \$ 100.38 | \$ 99.19 | \$ 97.84 | \$ 99.64 |
| Calgary Occupancy Rate | 44.5% | 54.8% | 64.2% | 61.7% | 70.5% | 78.0% | 80.9% | 72.2% | 76.6% | 70.0% | 58.9% | 42.8% | 64.7% |
| Per cent change | -2.2% | -4.9% | 15.9% | 5.5% | 16.0% | 8.6% | 5.9% | 3.7% | 6.8% | 10.4% | 5.9% | -1.2% | 6.4% |
| Average Daily Room Rate | \$ 109.37 | \$ 113.36 | \$ 116.23 | \$ 113.13 | \$ 118.25 | \$ 131.26 | \$ 138.69 | \$ 116.57 | \$ 123.59 | \$ 118.53 | \$ 115.80 | \$ 108.28 | \$ 118.52 |
| Mountain Rgns Occupancy Rate | 48.7% | 58.7% | 54.5% | 56.5% | 76.5% | 81.2% | 88.5% | 88.1% | 79.7% | 60.6% | 45.5% | 53.4% | 66.0% |
| Per cent change | 7.7% | 0.3% | -14.0% | -0.7% | 31.9% | 24.9% | 6.1% | 9.6% | 13.9% | 4.7% | -2.8% | 11.0% | 7.7% |
| Average Daily Room Rate | \$ 171.44 | \$ 195.00 | \$ 203.52 | \$ 163.57 | \$ 211.02 | \$ 298.73 | \$ 350.59 | \$373.17 | \$ 291.74 | \$189.56 | \$134.59 | \$ 197.79 | \$ 237.77 |
| Total Alberta Occupancy Rate | 48.1% | 58.1% | 62.9% | 59.2% | 64.1% | 69.3% | 75.1% | 72.4% | 70.8% | 64.8% | 60.1% | 47.6% | 62.9% |
| Per cent change | 2.1% | -4.0% | 5.5% | 1.0% | 7.6% | 6.0% | 6.2% | 3.4% | 8.4% | 4.8% | 4.2% | 4.2% | 4.5% |
| Average Daily Room Rate | \$ 103.67 | \$ 106.92 | \$ 107.35 | \$ 107.61 | \$ 113.63 | \$ 133.16 | \$ 147.14 | \$ 131.35 | \$ 126.56 | \$ 104.46 | \$ 101.17 | \$ 106.97 | \$ 115.20 |

| National Park Attendance (000's of person visits) | | | | | | | | | | | | | |
|--|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|-------|---------------|----------|
| Banff (revised) | 133.6p | 157.9p | 169.5p | 215.5p | 220.0p | 239.7p | 501.1p | 478.5p | 339.2p | 111.3p | 92.5p | 113.0p | 2,771.8p |
| Per cent change | -6.3% | 9.5% | 7.6% | 6.5% | -1.5% | -4.8% | 4.9% | 0.6% | 9.7% | -3.0% | 6.9% | -0.9% | n/a |
| Jasper | 59.8 | 68.9 | 86.6 | 99.8 | 162.1 | 240.8 | 384.5 | 378.2 | 229.0p | 105.3p | 36.0p | 40.1p | 1,891.1p |
| Per cent change | -20.6% | 9.4% | 5.7% | 5.7% | 5.0% | -3.1% | 2.4% | 2.2% | 6.4% | -5.7% | 11.7% | 1.2% | 1.6% |
| Waterton Lakes | 5.6 | 7.8 | 8.5 | 13.1 | 23.4 | 51.0 | 96.0 | 86.9 | 47.1p | 15.5p | 6.6p | 6.2p | 367.5p |
| Per cent change | -11.9% | 35.1% | 28.7% | 16.8% | -16.3% | -13.9% | 2.8% | 3.3% | 9.0% | -10.9% | 15.9% | -12.0% | 8.8% |

| Employment (000's of persons) | | | | | | | | | | | | | |
|--------------------------------------|-------|-------|-------|-------|-------|-------|-------|-------|-------|--------|--------|--------|--------|
| Accommodation, Food & Beverage | 116.8 | 116.5 | 118.4 | 121.1 | 122.2 | 119.1 | 130.5 | 128.8 | 129.3 | 124.2p | 124.3p | 128.2p | 123.3p |
| Per cent change | -4.3% | -4.2% | -7.1% | -0.7% | 0.0% | -1.0% | 6.2% | 8.6% | 10.7% | 2.3% | 1.0% | 6.9% | 1.4% |

| Restaurant Receipts (\$millions) | | | | | | | | | | | | | |
|---|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|-----------------|
| Total Receipts for Alberta | 299.2r | 332.4r | 346.6r | 348.9r | 360.7r | 344.8r | 372.8r | 363.8r | 334.3r | 351.5r | 343.2r | 349.3r | 4,147.7r |
| Per cent change | 2.1% | 14.8% | 7.5% | 8.2% | 3.8% | 5.9% | 7.2% | 7.8% | 6.8% | 3.1% | 4.2% | 4.4% | 6.2% |

| Historic Sites and Museums (000s of person visits) | | | | | | | | | | | | | |
|---|-------|-------|--------|-------|--------|--------|-------|-------|------|-------|-------|--------|-------|
| Visitor Attendance | 24.6 | 39.5 | 37.0 | 47.7 | 68.3 | 100.0 | 179.1 | 173.3 | 67.5 | 54 | 28.8 | 23.2 | 843.2 |
| Per cent change | -0.3% | 14.7% | -13.0% | -5.6% | -10.4% | -10.5% | -1.8% | -5.8% | 5.8% | 21.0% | -3.5% | -23.7% | -3.7% |

Accommodation Indices courtesy of HVS International (Vancouver) and Smith Travel Research

New or updated monthly figures are shown in bold type

p=preliminary

r=revised

e=estimate