

## 2002 Alberta Tourism Market Monitor

### Alberta Economic Development

|   | Jan.     | Feb.     | Mar.     | Apr.     | May      | June     | July     | August   | Sept.    | Oct.     | Nov.     | Dec.     | Yr-to-Date |
|---|----------|----------|----------|----------|----------|----------|----------|----------|----------|----------|----------|----------|------------|
| <b>Entries into CANADA by Country of Residence (000's of trips)</b> |          |          |          |          |          |          |          |          |          |          |          |          |            |
| United States   | 2,179.2p | 2,333.4p | 2,767.2p | 2,740.1p | 3,508.5p | 4,335.0p | 5,509.4p | 5,704.2p | 3,524.8p | 3,015.9p | 2,575.7p | 2,682.1p | 40,878.2p  |
| Per cent change   | -13.4%   | -10.3%   | -8.2%    | -13.4%   | -10.0%   | -11.3%   | -10.7%   | -6.6%    | 11.3%    | 24.1%    | 9.3%     | 4.8%     | -4.6%      |
| Total Other International (n/incl US)                               | 167.1p   | 189.0p   | 225.8p   | 229.9p   | 343.1p   | 449.6p   | 644.0p   | 551.5p   | 462.6p   | 309.5p   | 185.3p   | 259.2p   | 4,018.1p   |
| Per cent change   | -14.2%   | -6.1%    | -5.7%    | -20.7%   | -13.4%   | -17.1%   | -6.0%    | -11.3%   | 3.4%     | 17.7%    | 20.4%    | 7.8%     | -6.0%      |
| United Kingdom  | 32.7p    | 44.9p    | 55.0p    | 42.8p    | 67.4p    | 88.3p    | 102.1p   | 103.3p   | 91.1p    | 53.0p    | 33.9p    | 54.3p    | 769.0p     |
| Per cent change   | -12.9%   | -5.1%    | 3.2%     | -28.9%   | -13.4%   | -18.7%   | -17.2%   | -16.1%   | -11.3%   | -7.3%    | 5.1%     | 1.9%     | -12.3%     |
| Germany   | 9.4p     | 11.0p    | 13.4p    | 14.0p    | 29.8p    | 37.6p    | 50.7p    | 46.6p    | 50.8p    | 22.8p    | 11.2p    | 13.8p    | 311.7p     |
| Per cent change   | -12.9%   | -11.7%   | -8.8%    | -27.6%   | -23.9%   | -18.8%   | -15.8%   | -18.2%   | -2.8%    | 0.8%     | -1.2%    | 0.2%     | -13.4%     |
| Japan   | 14.9p    | 16.9p    | 23.9p    | 32.6p    | 37.2p    | 40.2p    | 52.2p    | 58.8p    | 69.2p    | 59.3p    | 24.0p    | 23.3p    | 452.5p     |
| Per cent change   | -21.9%   | -26.3%   | -24.6%   | -1.6%    | -11.2%   | -29.4%   | -25.6%   | -15.9%   | 57.5%    | 120.9%   | 91.8%    | 16.7%    | 0.8%       |

|  |        |       |       |        |        |        |        |        |       |       |       |       |        |
|--|--------|-------|-------|--------|--------|--------|--------|--------|-------|-------|-------|-------|--------|
| <b>Alberta Direct Entries (000's of trips)</b> |        |       |       |        |        |        |        |        |       |       |       |       |        |
| U.S. Residents                                 | 23.9p  | 26.2p | 38.3p | 28.6p  | 43.6p  | 75.6p  | 119.2p | 96.5p  | 52.1p | 33.0p | 25.6p | 41.1p | 604.1p |
| Per cent change                                | -2.8%  | -0.7% | 1.6%  | -10.2% | 2.2%   | 0.2%   | 6.4%   | 0.3%   | 16.7% | 5.5%  | -2.4% | 7.0%  | 2.8%   |
| Other Countries                                | 12.0p  | 15.1p | 17.1p | 8.9p   | 18.8p  | 25.6p  | 34.2p  | 30.1p  | 26.4p | 13.2p | 6.1p  | 14.7p | 222.3p |
| Per cent change                                | -15.7% | -8.5% | -4.1% | -30.3% | -17.7% | -29.7% | -22.9% | -20.2% | 1.0%  | 43.1% | 21.1% | 3.3%  | -13.8% |

|  |        |        |        |        |        |        |        |        |        |        |        |        |          |
|--|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|----------|
| <b>Air Passengers (000's of enplanements and deplanements)</b> |        |        |        |        |        |        |        |        |        |        |        |        |          |
| Edmonton International   | 291.9p | 285.6p | 315.4p | 296.7p | 311.9p | 313.5p | 355.9p | 385.4p | 291.9p | 300.1p | 292.2p | 333.2p | 3,773.8p |
| Per cent change  | -10.3% | -11.5% | -10.8% | -9.5%  | -3.6%  | -7.0%  | -9.4%  | -7.5%  | 7.6%   | -0.1%  | 9.4%   | 10.7%  | -4.2%    |
| Calgary International  | 584.0p | 590.7p | 652.3p | 605.6p | 640.5p | 655.3p | 779.3p | 817.6p | 680.5p | 677.9p | 530.5p | 648.5p | 7,884.0p |
| Per cent change  | -4.2%  | 1.2%   | -1.9%  | -5.1%  | -2.6%  | -4.6%  | -3.5%  | -2.4%  | 20.0%  | 13.9%  | 0.6%   | 6.9%   | 1.2%     |

|  |       |       |       |       |       |        |        |       |       |       |       |        |          |
|--|-------|-------|-------|-------|-------|--------|--------|-------|-------|-------|-------|--------|----------|
| <b>Highway Count (000's of vehicles)</b> |       |       |       |       |       |        |        |       |       |       |       |        |          |
| Hwy 1 -Sask border w-bound               | 49.2  | 44.2e | 55.5  | 58.3  | 62.7  | 69.3   | 95.7   | 98    | 70.9  | 68.5  | 55.4  | 63.1p  | 790.8p   |
| Per cent change                          | 7.0%  | 0.0%  | 6.7%  | -4.4% | 0.9%  | 3.0%   | 3.4%   | -3.0% | 6.1%  | 3.4%  | -0.4% | 1.8%   | 1.8%     |
| Hwy 1 - Banff Pk Gate (2-way)            | 333.6 | 348.4 | 394.4 | 392.8 | 444.2 | 461.9e | 664.5e | 727.8 | 494.8 | 393.6 | 327.9 | 383.1p | 5,367.0p |
| Per cent change                          | 3.8%  | 10.9% | 1.5%  | -1.0% | 1.9%  | 0.0%   | 0.0%   | 2.8%  | -2.6% | 0.2%  | 1.8%  | -1.6%  | 1.2%     |
| Hwy 16 - Jasper Pk Gate (2 way)          | 73.5  | 73.3  | 91.1  | 94.5  | 107.4 | 124.6  | 174.7  | 196.1 | 119.8 | 91.9  | 63.5  | 77.2p  | 1,287.6p |
| Per cent change                          | 12.7% | 18.8% | 8.8%  | 1.4%  | 3.6%  | 8.7%   | 3.1%   | 2.3%  | 0.0%  | -0.6% | -6.4% | -11.3% | 3.2%     |
| Hwy 16 - Jct #897 w-bound                | 105.9 | 101.1 | 115.8 | 120.2 | 131.5 | 134.7  | 149.5  | 151.8 | 129.5 | 131.5 | 119.9 | 123.4p | 1,514.8p |
| Per cent change                          | 0.6%  | 1.6%  | -2.6% | -3.3% | 3.1%  | 3.5%   | 2.7%   | 0.0%  | 3.0%  | 1.6%  | 2.9%  | 1.6%   | 1.6%     |

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

|                              | Jan.      | Feb.      | Mar.      | Apr.      | May       | June      | July      | August    | Sept.     | Oct.      | Nov.      | Dec.      | Yr-to-Date |
|------------------------------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|------------|
| <b>Accommodation Indices</b> |           |           |           |           |           |           |           |           |           |           |           |           |            |
| Edmonton Occupancy Rate      | 56.2%     | 76.1%     | 77.1%     | 83.2%     | 83.0%     | 80.6%     | 77.2%     | 85.2%     | 72.3%     | 67.0%     | 71.1%     | 48.4%     | 72.9%      |
| Per cent change              | 5.8%      | 9.3%      | 11.1%     | 26.8%     | 27.3%     | 20.3%     | 8.7%      | 0.7%      | 16.6%     | 2.6%      | -0.8%     | -10.7%    | 9.6%       |
| Average Daily Room Rate      | \$ 80.12  | \$ 88.40  | \$ 89.35  | \$ 89.66  | \$ 89.52  | \$ 93.20  | \$ 87.27  | \$ 96.99  | \$ 92.01  | \$ 97.40  | \$ 102.44 | \$ 93.15  | \$ 91.61   |
| Calgary Occupancy Rate       | 50.3%     | 56.7%     | 63.5%     | 63.6%     | 69.2%     | 82.0%     | 78.2%     | 74.9%     | 74.9%     | 65.5%     | 58.5%     | 43.1%     | 64.9%      |
| Per cent change              | 0.0%      | -5.2%     | -2.0%     | 1.1%      | -0.2%     | 6.9%      | -4.4%     | 2.7%      | 5.3%      | 4.5%      | 2.8%      | -2.7%     | 0.8%       |
| Average Daily Room Rate      | \$ 99.25  | \$ 103.50 | \$ 108.01 | \$ 109.21 | \$ 110.91 | \$ 132.31 | \$ 132.31 | \$ 111.76 | \$ 118.52 | \$ 108.33 | \$ 107.22 | \$ 99.99  | \$ 114.14  |
| Mountain Rgns Occupancy Rate | 52.8%     | 59.0%     | 66.5%     | 61.8%     | 63.9%     | 74.5%     | 89.9%     | 93.2%     | 79.1%     | 63.8%     | 46.1%     | 51.6%     | 67.0%      |
| Per cent change              | -3.1%     | 0.5%      | -0.3%     | 1.6%      | -7.4%     | -6.5%     | -4.0%     | -0.3%     | 15.1%     | 12.1%     | 12.2%     | 6.4%      | 1.5%       |
| Average Daily Room Rate      | \$ 142.26 | \$ 178.61 | \$ 169.84 | \$ 138.82 | \$ 187.43 | \$ 291.27 | \$ 332.84 | \$323.96  | \$ 283.19 | \$171.73  | \$131.22  | \$ 195.98 | \$ 222.75  |
| Total Alberta Occupancy Rate | 50.7%     | 62.0%     | 65.7%     | 65.6%     | 68.0%     | 75.4%     | 76.1%     | 79.2%     | 71.5%     | 63.4%     | 59.6%     | 44.8%     | 65.2%      |
| Per cent change              | -2.5%     | -1.1%     | -1.1%     | 6.0%      | 2.6%      | 3.4%      | -3.1%     | 0.1%      | 6.1%      | 1.0%      | 1.2%      | -5.1%     | 0.6%       |
| Average Daily Room Rate      | \$ 92.52  | \$ 97.48  | \$ 100.36 | \$ 99.44  | \$ 106.45 | \$ 129.78 | \$ 137.87 | \$ 131.74 | \$ 125.38 | \$ 105.51 | \$ 101.47 | \$ 103.34 | \$ 113.12  |

| <b>National Park Attendance (000's of person visits)</b> |       |       |        |       |        |       |       |       |       |       |        |       |         |
|--|-------|-------|--------|-------|--------|-------|-------|-------|-------|-------|--------|-------|---------|
| Banff  | 284.2 | 298.2 | 310.9  | 323.8 | 384.2  | 469.6 | 705.7 | 756.8 | 475.5 | 267.6 | 203.8  | 244.5 | 4,724.7 |
| Per cent change  | 2.0%  | 7.7%  | 1.7%   | -2.4% | 0.6%   | 2.6%  | 2.9%  | 2.7%  | 1.7%  | -1.7% | -1.8%  | -3.3% | 1.5%    |
| Jasper   | 68.7  | 71.1  | 92.0   | 89.2  | 162.8  | 255.5 | 385.5 | 416.9 | 236.4 | 109.9 | 35.1   | 35.9  | 1,959.0 |
| Per cent change  | 9.3%  | 14.7% | 5.1%   | -6.3% | -2.5%  | 4.2%  | 2.9%  | 1.0%  | 2.0%  | -3.5% | -1.3%  | -8.8% | 1.6%    |
| Waterton Lakes   | 6.8   | 7.5   | 8.3    | 10.5  | 26.7   | 54.1  | 104.6 | 105.6 | 52.9  | 15.0  | 7.2    | 6.8   | 406.1   |
| Per cent change  | -7.6% | 9.5%  | -13.6% | -9.9% | -23.3% | -7.6% | 2.3%  | -1.5% | 20.6% | -9.3% | -16.4% | -7.2% | -5.1%   |

| <b>Employment (000's of persons)</b> |       |       |       |       |       |       |       |       |       |       |       |       |        |
|--------------------------------------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|--------|
| Accommodation, Food & Beverage       | 115.7 | 120.2 | 117.2 | 115.6 | 117.1 | 121.2 | 124.7 | 123.8 | 118.0 | 118.0 | 118.8 | 119.8 | 119.2p |
| Per cent change                      | -4.5% | 0.6%  | 5.3%  | 2.8%  | 2.7%  | 5.3%  | 6.8%  | 11.1% | 4.1%  | 2.2%  | 7.1%  | 5.7%  | 4.1%   |

| <b>Restaurant Receipts (\$millions)</b> |               |               |               |               |               |               |               |               |               |               |               |               |                 |
|---|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|-----------------|
| Total Receipts for Alberta              | <b>288.0r</b> | <b>284.0r</b> | <b>323.2r</b> | <b>320.1r</b> | <b>334.4r</b> | <b>318.1r</b> | <b>338.2r</b> | <b>329.8r</b> | <b>304.6r</b> | <b>323.1r</b> | <b>316.9r</b> | <b>325.5r</b> | <b>3,806.1r</b> |
| Per cent change                         | <b>6.0%</b>   | <b>3.5%</b>   | <b>0.0%</b>   | <b>4.7%</b>   | <b>5.6%</b>   | <b>3.4%</b>   | <b>3.6%</b>   | <b>3.7%</b>   | <b>2.6%</b>   | <b>4.1%</b>   | <b>0.4%</b>   | <b>4.3%</b>   | <b>3.2%</b>     |

| <b>Historic Sites and Museums (000s of person visits)</b> |       |       |        |        |        |        |        |       |        |       |       |        |        |
|---|-------|-------|--------|--------|--------|--------|--------|-------|--------|-------|-------|--------|--------|
| Visitor Attendance  | 46.3  | 36.8  | 37.4   | 36.3   | 72.6   | 113.2  | 201.8  | 207.3 | 74.9   | 43.2p | 31.6p | 25.1p  | 926.4p |
| Per cent change   | 12.7% | -7.1% | -28.3% | -30.3% | -16.8% | -11.0% | -11.4% | 0.8%  | -11.6% | 1.8%  | -7.6% | -36.6% | -10.4% |

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