

Alberta Tourism Market Monitor

Monthly
Update



February 2014

For 2013, the occupancy rate for Alberta (excluding resorts) was 68.2%, up +2.4 points compared to 2012 (65.8%). The average daily room rate for Alberta (excluding resorts) for 2013 was \$137.59, up +3.9% compared to 2012 (\$132.38).

	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.	Y-T-D Total 2013
Edmonton Occupancy Rate	54.9%	70.1%	74.1%	76.3%	71.9%	73.5%	65.0%	71.6%	74.3%	74.1%	75.5%	55.6%	69.7%
Point Change from 2012	3.1	2.7	3.1	7.3	-0.5	5.0	-0.6	2.2	5.0	4.2	2.2	4.4	3.2
Average Daily Room Rate	\$122.89	\$126.33	\$127.98	\$128.28	\$127.16	\$128.49	\$123.82	\$123.80	\$129.41	\$130.58	\$132.61	\$129.53	\$127.48
Variance from 2012	3.0%	3.3%	3.6%	4.5%	1.7%	5.8%	4.2%	4.4%	5.9%	5.4%	3.9%	9.1%	4.3%
Calgary Occupancy Rate	59.5%	66.2%	69.6%	75.5%	74.7%	75.8%	84.1%	80.5%	80.6%	77.2%	74.7%	55.3%	72.7%
Point Change from 2012	2.1	2.7	1.8	7.0	3.1	-2.4	0.8	4.3	-2.2	2.4	3.4	1.9	1.9
Average Daily Room Rate	\$154.93	\$157.46	\$152.51	\$161.52	\$160.89	\$169.95	\$186.32	\$149.31	\$163.85	\$166.57	\$164.02	\$150.78	\$162.23
Variance from 2012	7.8%	5.2%	2.9%	7.3%	4.4%	-1.4%	1.3%	4.0%	2.7%	6.2%	5.3%	6.3%	3.9%
Alberta Resorts Occupancy Rate	37.0%	44.5%	52.9%	43.1%	55.5%	64.6%	78.4%	87.1%	77.7%	51.6%	41.2%	48.3%	57.1%
Point Change from 2012	1.2	0.0	3.8	-2.9	2.2	-5.1	-3.1	1.9	2.0	3.6	4.7	1.2	0.8
Average Daily Room Rate	\$161.05	\$167.87	\$169.43	\$158.48	\$180.26	\$226.61	\$246.67	\$250.19	\$223.15	\$172.40	\$162.92	\$205.62	\$202.63
Variance from 2012	7.8%	3.8%	3.0%	3.0%	2.2%	4.7%	4.5%	2.8%	4.8%	2.9%	7.8%	1.6%	3.4%
Other Alberta* Occupancy Rate	56.1%	63.6%	63.9%	57.5%	58.7%	63.9%	70.9%	70.6%	71.1%	70.2%	68.8%	51.7%	64.0%
Point Change from 2012	1.3	2.2	0.1	3.6	0.1	-1.0	4.5	2.9	4.8	4.5	2.7	2.8	2.5
Average Daily Room Rate	\$124.25	\$125.29	\$126.14	\$124.60	\$123.83	\$125.00	\$125.45	\$125.13	\$125.82	\$125.88	\$127.66	\$123.41	\$125.41
Variance from 2012	5.1%	4.1%	5.3%	5.1%	4.4%	3.8%	4.0%	1.4%	3.2%	2.8%	3.8%	3.0%	3.9%
Total Alberta (excluding Resorts) Occupancy Rate	56.7%	66.2%	68.6%	68.2%	67.1%	70.1%	73.0%	73.8%	74.8%	73.4%	72.4%	53.9%	68.2%
Point Change from 2012	2.0	2.4	1.4	5.4	0.5	0.2	2.0	3.2	2.9	3.7	2.6	3.0	2.4
Average Daily Room Rate	\$133.15	\$134.98	\$134.50	\$137.68	\$136.83	\$140.22	\$145.28	\$132.52	\$138.94	\$139.89	\$140.29	\$133.48	\$137.59
Variance from 2012	5.3%	4.1%	3.9%	5.7%	3.7%	2.0%	2.6%	3.4%	3.4%	4.6%	4.5%	5.8%	3.9%

* Includes Lethbridge, Red Deer and other Alberta communities.

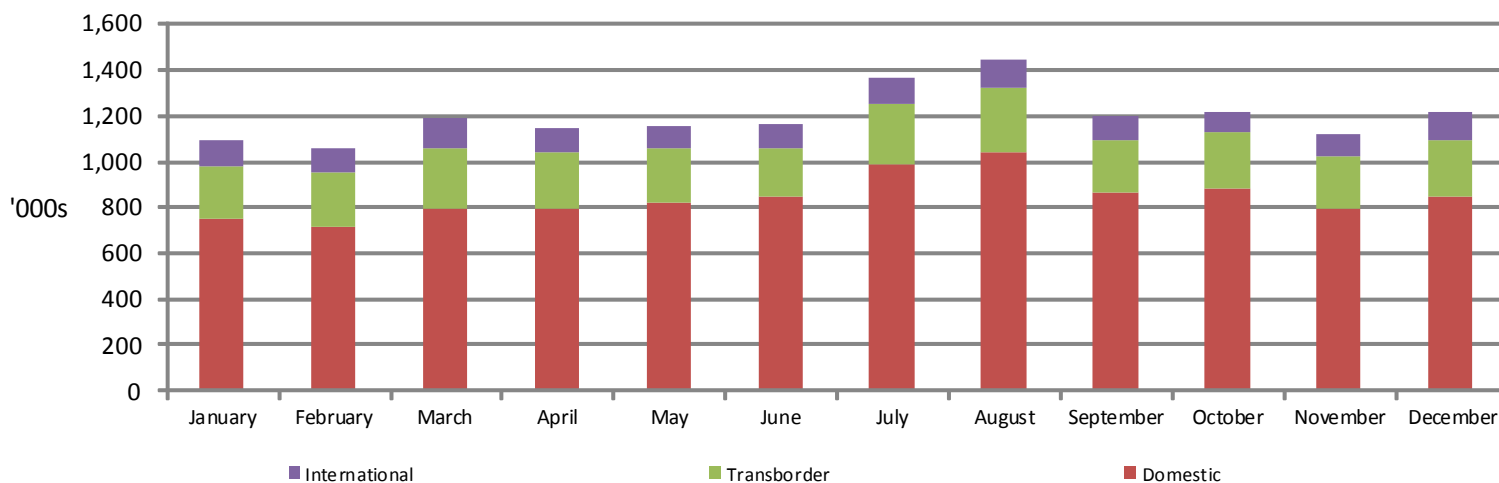
Source: PKF Consulting Inc.

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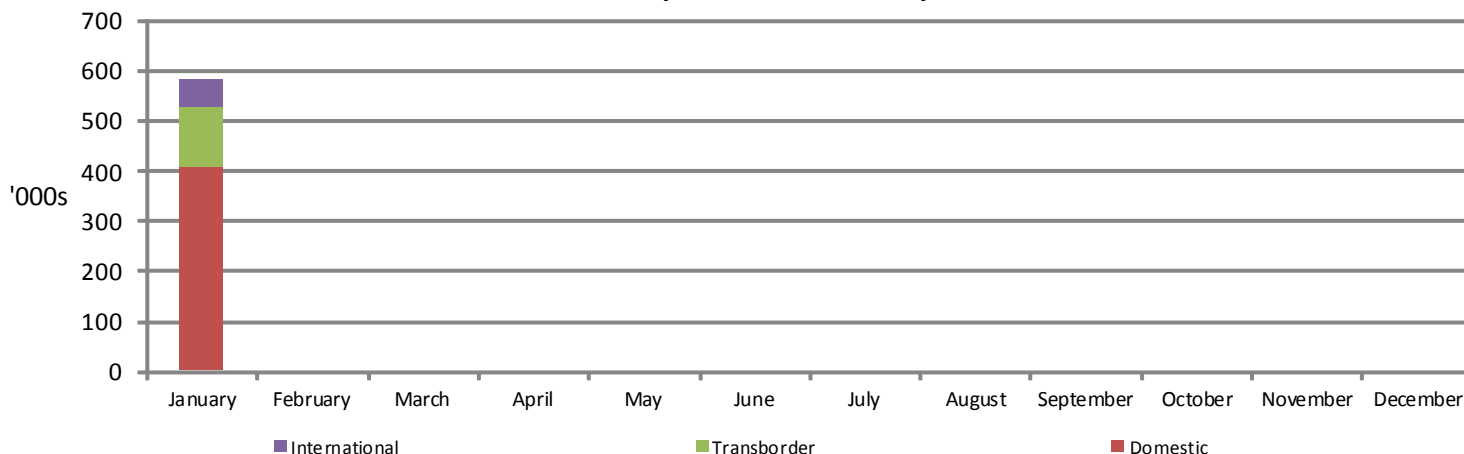
Air Passengers 2013/2014 (enplanements and deplanements)

Calgary International Airport reported that in December 2013, 1,209,432 passengers either boarded or deplaned at the airport, a +7.7% increase compared to December 2012 (1,122,484). For 2013, 14.3 million passengers either boarded or deplaned at the airport, a +4.9% increase compared to 2012. For 2013, domestic passengers are up +5.1%, transborder passengers are up +6.9%, and international (overseas) passengers are down -0.7%.
 Edmonton International Airport reported that in January 2014, 583,916 passengers either boarded or deplaned at the airport, a +5.8% increase compared to January 2013 (551,651). For January 2014, domestic passengers are up +5.1%, transborder passengers are up +6.4%, and international (overseas) passengers are up +10.5%.

**Calgary International Airport
2013 Deplanements and Enplanements**



**Edmonton International Airport
2014 Deplanements and Enplanements**

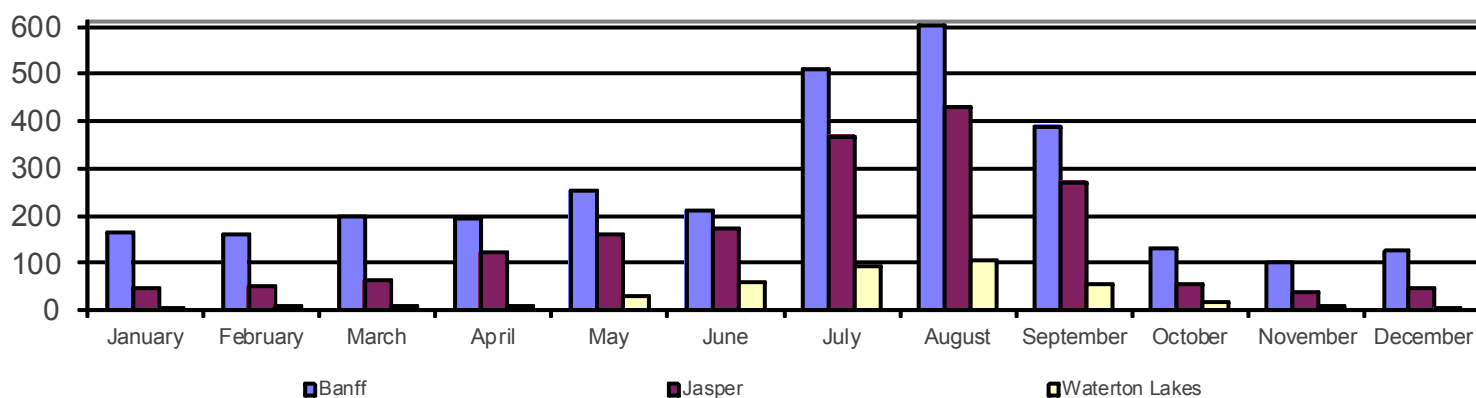


Source: Edmonton International Airport and Calgary Airport Authority.

National Park Attendance ('000s of person-visits) Group Tours not included

For December 2013, independent visits to Banff National Park were 125,262, a decrease of -4.6% compared to December 2012 (131,366). For 2013, independent visits to Banff National Park were 3.04 million, an increase of +0.1%. For December 2013, independent visits to Jasper National Park were 46,817, a decrease of -7.0% compared to December 2012 (50,324). For 2013, independent visits to Jasper National Park were 1.83 million, an increase of +2.5%. For December 2013, independent visits to Waterton Lakes National Park were 6,001, a decrease of -4.8% compared to December 2012 (6,288). For 2013, independent visits to Waterton Lakes National Park were 408,304, an increase of +1.7%.

Independent Visits to National Parks ('000s) - 2013



Source: Parks Canada.

Historic Sites and Museums 2014 ('000s of person-visits)

2014	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.	Y-T-D Total
Visitor Attendance	23.5												23.5
% Change from 2013	10.9%												10.9%

Source: Alberta Culture, Heritage Division.

Employment 2014 ('000s of persons)

Employment in the Accommodation, Food and Beverage sector in Alberta increased +15.5% in January 2014, compared to January 2013.

<i>Preliminary-Seasonally Adjusted</i>	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.	Average Y-T-D Total
Accommodation, Food and Beverage	149.2												149.2
% Change from 2013	15.5%												15.5%

Source: Statistics Canada, Labour Force Survey.

Food Services and Drinking Places 2013 (\$millions)

According to results from Statistics Canada's Food Services and Drinking Places survey, Alberta's unadjusted total receipts for November 2013 were up +8.9% to \$702.5 million, compared to November 2012 (\$645.0 million).

<i>Preliminary</i>	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.	Average Y-T-D Total
Total Receipts for Alberta	\$606.1	\$609.2	\$686.3	\$661.1	\$700.2	\$686.7	\$704.6	\$713.1	\$696.7	\$716.3	\$702.5		\$680.3
% Change from 2012	5.1%	3.5%	4.6%	7.6%	8.3%	4.5%	5.6%	8.1%	7.2%	10.0%	8.9%		6.7%

Source: Statistics Canada, Food Services and Drinking Places (Unadjusted)

Highway Traffic Count ('000s of Vehicles) 2013

<i>Preliminary</i>	Hwy 1—Sask border w-bound	% Change from 2012	Hwy 1—Banff Pk Gate (2 way)	% Change from 2012	Hwy 16—Jasper Pk Gate (2 way)	% Change from 2012	Hwy 16—Jct #897 w-bound	% Change from 2012
January	55.3	-2.1%	457.3	6.1%	89.9	-1.0%	165.0	1.5%
February	56.0	-0.9%	472.4	8.0%	86.4	-4.4%	160.1	-2.7%
March	63.7	2.2%	535.3	13.8%	112.9	4.2%	176.2	0.5%
April	65.5	-7.9%	459.8	-5.1%	107.3	-8.1%	178.9	-3.3%
May	78.6	3.4%	580.0	6.1%	136.3	4.3%	200.2	1.9%
June	77.3	-3.9%	457.8	-19.1%	176.3	21.7%	198.7	0.6%
July	103.1	-0.9%	782.3	-3.5%	213.2	3.6%	215.0	2.4%
August	108.7	1.2%	937.5	7.8%	247.3	7.6%	221.6	1.1%
September	80.5	0.9%	654.0	2.0%	155.9	3.9%	201.8	3.2%
October	80.4	3.7%	522.1	13.2%	118.4	6.3%	207.0	5.1%
November	65.9	5.1%	403.6	2.4%	81.0	1.9%	180.0	1.6%
December	66.4	-7.4%	474.5	-3.7%	94.0	-6.9%	168.1	-2.5%
Year-To-Date	901.4	-0.8%	6,736.6	2.0%	1,618.9	3.8%	2,272.6	0.9%

Source: Alberta Transportation.

Definitions of Indicators

Air Passengers - Data are preliminary estimates of the number of air passengers enplaning and deplaning. Source: Calgary Airport Authority and Edmonton International Airport (websites).

Highway Traffic - These data 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).

Accommodation Indices— Occupancy rates and average daily room rates are based on a sample of hotels for each respective location. Source: PKF Consulting Inc., Trends in the Canadian Hotel Industry.

Historic Sites and Museums— Visitor attendance figures are monthly totals based on fifteen historic sites, the Royal Alberta Museum, the Royal Tyrrell Museum of Paleontology, and the Tyrrell Field Station. Source: Alberta Culture, Heritage Division.

National Park Attendance— Attendance is reported as the number of independent visits to National Parks in Alberta. Data are preliminary unless otherwise noted. Beginning in 2004, the monthly figures for Banff National Park and Jasper National Park reflected independent travellers only, and do not include people travelling as part of a tour group. The tour group data, however, are included in the annual total. Source: Parks Canada.

Employment in the Food and Accommodation Sector— The employment figure represents all persons 15 years or older who worked for pay or profit or unpaid work in the food services and accommodation sectors, 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 figure is an average for the year. Employment figures are seasonally adjusted. Source: Statistics Canada, Labour Force Survey.

Food Services and Drinking Places— The monthly survey 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 includes full-service restaurants, limited service eating places, special food places and drinking places. Data are unadjusted. The year-to-date figure is an average for the year. Source: Statistics Canada, Food Services and Drinking Places, CANSIM table: 355-0006.

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