

# Alberta Tourism Market Monitor

Monthly  
Update



March 2015

For the period of January to December 2014, the occupancy rate for Alberta (excluding resorts) was 67.8%, down 0.3 points from 2013 (68.1%). For the same period, the average daily room rate for Alberta (excluding resorts) was \$142.98, up 3.5% compared to 2013 (\$138.10).

	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.	Y-T-D Total 2014
<b>Edmonton Occupancy Rate</b>	58.3%	68.2%	74.1%	74.8%	72.9%	69.7%	64.8%	76.3%	70.8%	72.4%	73.5%	54.1%	<b>69.2%</b>
Point Change from 2013	3.5	-2.1	-0.2	-1.1	0.7	-3.8	-0.2	4.7	-3.6	-1.7	-2.1	-1.7	<b>-0.6</b>
Average Daily Room Rate	\$129.90	\$133.50	\$135.81	\$135.34	\$135.51	\$136.02	\$127.73	\$133.28	\$136.87	\$136.22	\$138.41	\$130.12	<b>\$133.90</b>
Variance from 2013	6.1%	6.4%	6.6%	5.6%	6.5%	5.9%	3.1%	7.8%	6.4%	4.6%	4.7%	0.9%	<b>5.2%</b>
<b>Calgary Occupancy Rate</b>	57.9%	63.3%	67.6%	71.3%	71.2%	76.4%	77.7%	79.3%	79.6%	73.6%	66.7%	53.6%	<b>70.0%</b>
Point Change from 2013	-1.8	-3.3	-2.2	-4.4	-3.4	1.1	-4.5	-1.1	<b>-0.9</b>	-3.5	-8.1	-1.9	<b>-2.9</b>
Average Daily Room Rate	\$157.27	\$161.74	\$160.21	\$164.21	\$163.50	\$184.30	\$190.01	\$150.26	\$170.95	\$171.78	\$166.03	\$153.34	<b>\$166.67</b>
Variance from 2013	1.2%	2.7%	5.0%	1.6%	1.0%	8.1%	1.6%	0.6%	4.5%	3.3%	1.4%	1.8	<b>2.8%</b>
<b>Alberta Resorts Occupancy Rate</b>	38.0%	45.6%	45.1%	46.1%	61.0%	75.9%	87.9%	91.8%	80.6%	54.5%	41.8%	49.6%	<b>60.1%</b>
Point Change from 2013	1.0	1.1	-7.7	3.8	5.6	11.1	9.4	4.7	2.9	2.9	0.6	1.3	<b>3.0</b>
Average Daily Room Rate	\$165.86	\$175.65	\$167.05	\$163.06	\$188.85	\$241.20	\$265.38	\$271.53	\$231.32	\$178.21	\$164.72	\$221.21	<b>\$214.70</b>
Variance from 2013	3.0%	4.7%	-1.3%	3.7%	5.0%	7.1%	7.6%	8.6%	3.6%	3.4%	1.1%	7.5%	<b>6.0%</b>
<b>Other Alberta* Occupancy Rate</b>	59.9%	66.4%	67.9%	59.2%	64.4%	67.1%	68.7%	71.0%	71.7%	70.2%	66.7%	49.4%	<b>65.3%</b>
Point Change from 2013	3.6	2.7	3.9	1.4	5.9	3.2	-1.8	0.9	0.8	0.3	-1.9	-2.2	<b>1.5</b>
Average Daily Room Rate	\$128.41	\$129.89	\$129.71	\$127.41	\$127.96	\$130.42	\$130.13	\$130.84	\$132.67	\$133.10	\$132.00	\$131.54	<b>\$130.93</b>
Variance from 2013	3.3%	3.7%	3.0%	2.3%	3.4%	2.6%	2.7%	3.7%	4.5%	4.2%	1.8%	4.9%	<b>3.1%</b>
<b>Total Alberta (excluding Resorts) Occupancy Rate</b>	58.8%	65.9%	69.5%	67.2%	68.8%	70.6%	70.3%	75.0%	73.8%	71.9%	68.6%	52.0%	<b>67.8%</b>
Point Change from 2013	2.0	-0.6	0.8	-1.2	1.6	0.6	-2.1	1.5	-0.9	-1.3	-3.8	-1.9	<b>-0.3</b>
Average Daily Room Rate	\$137.42	\$140.16	\$140.38	\$142.06	\$141.46	\$149.38	\$149.08	\$137.75	\$146.20	\$146.18	\$143.88	\$137.95	<b>\$142.98</b>
Variance from 2013	3.1%	4.0%	4.5%	3.1%	3.1%	5.8%	2.2%	3.7%	5.2%	4.1%	2.1%	2.9%	<b>3.5%</b>

No new data.

\*Includes Lethbridge, Red Deer and other Alberta communities.

Source: PKF Consulting Inc.

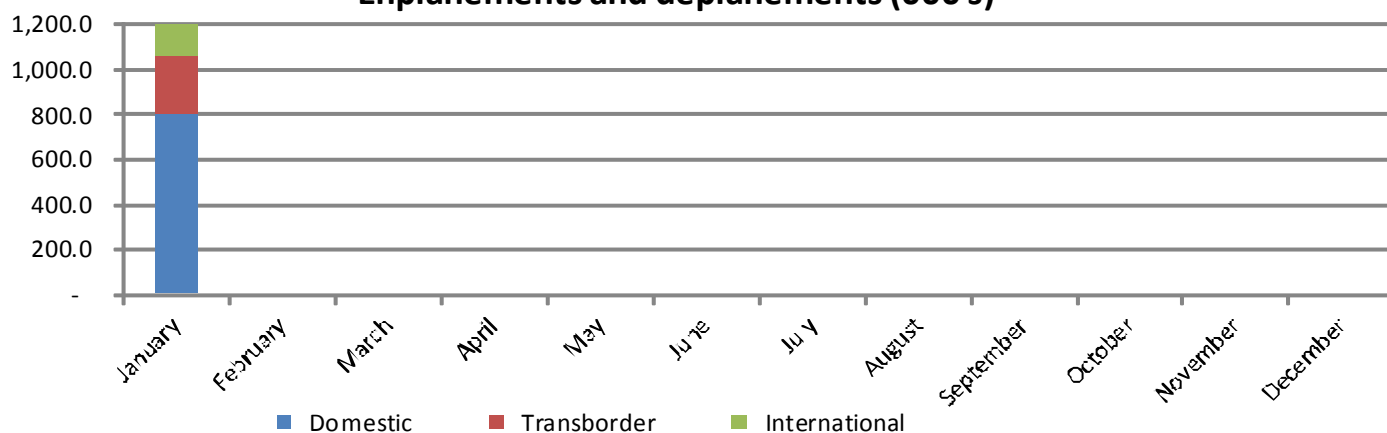
Alberta  
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## Air Passengers 2015 (enplanements and deplanements)

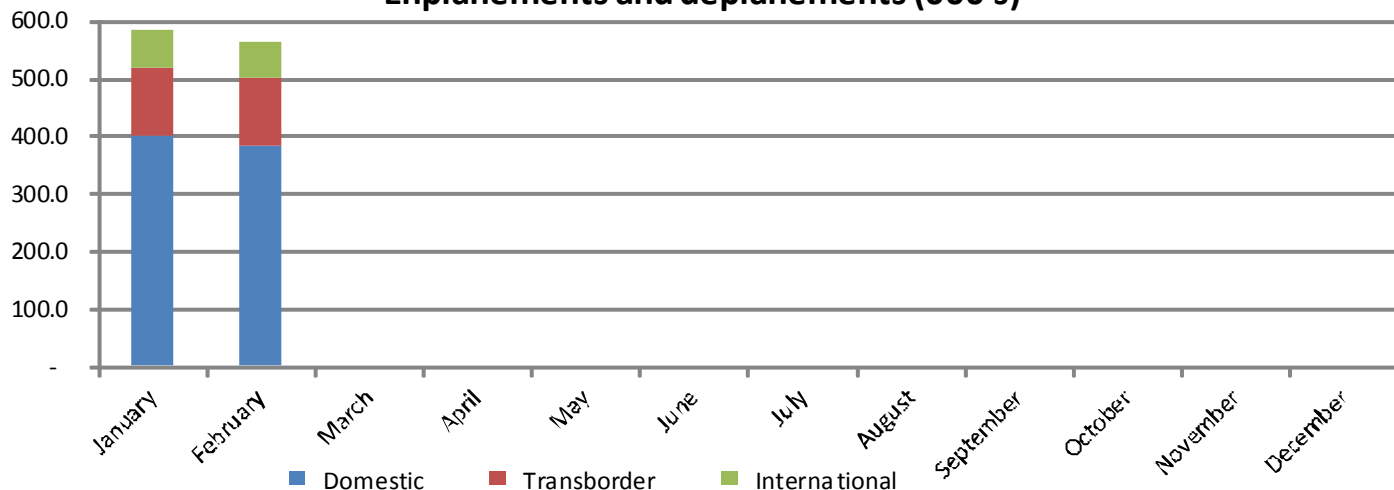
Calgary International Airport reported that 1.199 million passengers either boarded or deplaned at the airport in January 2015, a 2.3% increase compared to January 2014. Domestic passenger air traffic increased by 1.1%, while transborder passenger traffic increased by 1.8% and international (overseas) passenger traffic by 9.9%, compared to January 2014.

Edmonton International Airport reported that 561 600 passengers either boarded or deplaned at the airport in February 2015, a 0.7% decrease compared to February 2014. Domestic passenger air traffic declined by 2.9%, transborder passenger traffic decreased by 3.0%, and international (overseas) passenger air traffic increased by 17.9% compared to February 2014.

**Calgary International Airport 2015  
Enplanements and deplanements (000's)**



**Edmonton International Airport 2015  
Enplanements and deplanements (000's)**

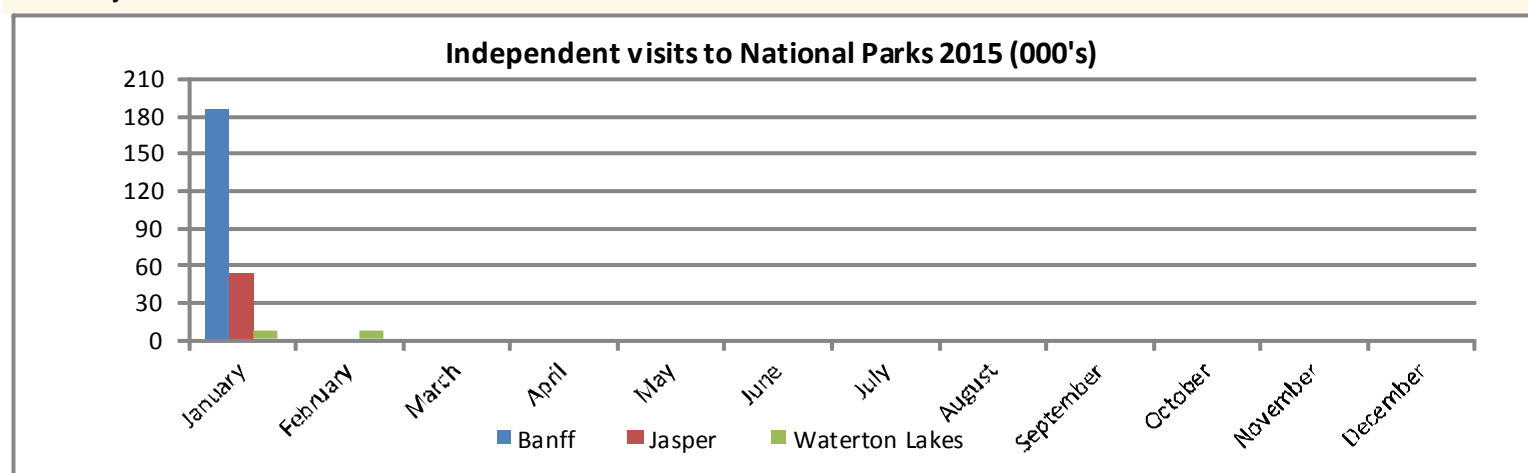


Source: Edmonton International Airport and Calgary Airport Authority

## National Park Attendance 2015 ('000s of person-visits) Group Tours not included

For January 2015:

- Banff National Park received 184,908 independent visitors, an increase of 8.1% compared to January 2014.
- Jasper National Park received 52,771 independent visitors, an increase of 6.0% compared to January 2014.
- Waterton Lakes National Park received 6,730 independent visitors, an increase of 3.5% compared to January 2014. For February 2015 independent visits to the Park totaled 7501, an increase of 19.1% over the same period last year.



Source: Parks Canada.

## Historic Sites and Museums 2015 ('000s of person-visits)

2015	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.	Y-T-D Total
Visitor Attendance	24.3	39.7											64
% Change from 2014	3.4%	-0.3%											1.1%

Source: Alberta Culture and Tourism, Heritage Division.

## Employment 2015 ('000s of persons)

Employment in the Accommodation, Food and Beverage sector in Alberta increased by 1.5% in February 2015, compared to February 2014.

Preliminary-Seasonally Adjusted	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.	Average Y-T-D Total
Accommodation, Food and Beverage	156.9	157.6											157.3
% Change from 2014	4.4%	1.5%											2.9%

Source: Statistics Canada, Labour Force Survey.

## Food Services and Drinking Places 2014 (\$ Millions)

According to results from Statistics Canada's Food Services and Drinking Places survey, Alberta's unadjusted total receipts for December 2014 totaled \$744 million, an increase of 7% over December 2013.

<i>Preliminary</i>	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.	Average Y-T-D Total
Total Receipts for Alberta	\$648.7	\$628.3	\$715.3	\$713.9	\$758.3	\$745.0	\$759.1	\$768.1	\$736.0	<b>\$765.7</b>	<b>\$727.4</b>	<b>\$744.0</b>	<b>\$725.8</b>
% Change from 2013	5.3%	2.7%	5.2%	8.2%	8.1%	6.4%	5.9%	6.8%	5.1%	<b>6.9%</b>	<b>3.8%</b>	<b>7.0%</b>	<b>6.0%</b>

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

## Highway Traffic Count ('000s of Vehicles) 2014

<i>Preliminary</i>	Hwy 1—Sask border w-bound	% Change from 2013	Hwy 1—Banff Pk Gate (2 way)	% Change from 2013	Hwy 16—Jasper Pk Gate ( 2 way)	% Change from 2013	Hwy 16—Jct #897 w-bound	% Change from 2013
January	55.9	1.1%	473.0	3.4%	91.8	2.1%	169.6	2.8%
February	56.0	0.0%	449.1	-4.9%	84.7	-2.0%	157.6	-1.6%
March	62.3	-2.2%	499.1	-6.8%	105.2	-6.8%	182.7	3.7%
April	71.5	9.2%	532.4	15.8%	124.6	16.1%	187.5	4.8%
May	77.3	-1.7%	586.2	1.1%	139.5	2.3%	200.7	0.2%
June	83.6	8.2%	659.8	44.1%	162.0	-8.1%	200.0	0.7%
July	104.0	0.9%	881.7	12.7%	224.4	5.3%	219.9	2.3%
August	110.5	1.7%	982.6	4.8%	264.8	7.1%	223.3	0.8%
September	79.2	-1.6%	645.7	-1.3%	154.4	-1.0%	202.5	0.3%
October	<b>81.7</b>	<b>1.6%</b>	<b>563.7</b>	<b>8.0%</b>	<b>125.3</b>	<b>5.8%</b>	<b>210.4</b>	<b>1.6%</b>
November	<b>64.4</b>	<b>-2.3%</b>	<b>408.5</b>	<b>1.2%</b>	<b>83.6</b>	<b>3.2%</b>	<b>178.4</b>	<b>-0.9%</b>
December								
Year-To-Date	<b>846.4</b>	<b>1.4%</b>	<b>6,681.8</b>	<b>6.7%</b>	<b>1,560.3</b>	<b>2.3%</b>	<b>2,123.6</b>	<b>1.3%</b>

No new data.

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. with reproduction and use of information subject to PKF Disclaimer and Restrictions as detailed at [www.pkfcanada.com](http://www.pkfcanada.com).

**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 and Tourism, 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 travelers only, and do not include people travelling as part of a tour group. The tour group data, however, are included in the annual edition of the Monthly Market Monitor. 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 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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