

# Alberta Tourism Market Monitor

## Edmonton air travel numbers gain altitude in April

Edmonton International Airport showed significant increases in air traffic volumes in April over the same month in 2016. Total arrivals and departures are up by 12.4%. The increases are driven by strong performance in domestic and international air traffic activities, which are up by 14.8% and 12.3%, respectively. Transborder numbers also rebounded for the first time in 2017, up 1.3% in April, following a series of declines in the first quarter of this year (-12.7% in January, -12.4% in February and -5.2% in March).

The Total Alberta Occupancy rate (excluding Resorts) also continued its upward trend with an increase of 3 points in March, following a 1point increase in February. However, the average daily room rate in March dropped 1.7% to \$129. Occupancy rate in Other Alberta continues its strong growth in March, with a 6.1% increase compared to the same month in 2016. However, the average daily room rate declined to \$116, down 3.8%.

For more information, please contact Emily Wang at [tourism.research@gov.ab.ca](mailto:tourism.research@gov.ab.ca) or 780-427-6206

Employment numbers for Accommodation and Food Services have also grown each month this year. This includes April, which was up 5.8% over the same month last year, leading to a 5.3% year-to-date increase over January-April 2016. The Accommodation and Food Services employment increases echo the increases in the province's overall job numbers. Between April 2016 and April 2017, the province's labour force increased by 33,400 and employment increased by 17,400.

**2017 Alberta Tourism Market Monitor**  
**Alberta Culture and Tourism**

	Jan.	Feb.	Mar.	Apr.	May	June	July	August	Sept.	Oct.	Nov.	Dec.	Yr-to-Date
<b>Air Passengers 2017 (000's of arrivals and departures) <sup>1</sup></b>													
Edmonton International Total	569.1p	547.0p	605.4p	601.7p	<b>614.9p</b>								<b>2,950.3p</b>
Per cent change from 2016	1.2%	-1.3%	4.7%	12.4%	<b>3.9%</b>								<b>4.5%</b>
Domestic	423.9p	410.0p	459.4p	458.8p	<b>522.2p</b>								<b>2,286.3p</b>
Per cent change from 2016	6.0%	3.0%	7.7%	14.8%	<b>6.0%</b>								<b>8.0%</b>
Transborder	84.7p	83.4p	90.5p	87.1p	<b>64.6p</b>								<b>345.7p</b>
Per cent change from 2016	-12.7%	-12.4%	-5.2%	1.3%	<b>-8.5%</b>								<b>-7.4%</b>
International	60.5p	53.7p	55.6p	55.8p	<b>28.1p</b>								<b>225.6p</b>
Per cent change from 2016	-7.4%	-12.1%	-1.0%	12.3%	<b>-2.2%</b>								<b>-2.9%</b>
Calgary International Total	1,234.3r	1,192.3p	1,320.0p	<b>1,298.1p</b>									<b>5,045.3p</b>
Per cent change from 2016	2.2%	-0.1%	1.2%	<b>8.3%</b>									<b>2.9%</b>
Domestic	829.6r	796.5p	874.3p	<b>885.2p</b>									<b>3,386.2p</b>
Per cent change from 2016	2.0%	-1.9%	-2.2%	<b>5.7%</b>									<b>0.9%</b>
Transborder	237.9p	243.5p	279.9p	<b>255.6p</b>									<b>1,016.8p</b>
Per cent change from 2016	0.6%	2.7%	6.4%	<b>15.0%</b>									<b>6.1%</b>
International	166.9r	152.3p	165.8p	<b>157.3p</b>									<b>642.3p</b>
Per cent change from 2016	5.8%	5.0%	12.3%	<b>13.3%</b>									<b>9.0%</b>
Fort McMurray International Total	58.1p	54.9p	61.6p	63.0p									237.6p
Per cent change from 2016	-14.5%	-22.7%	-19.4%	-12.7%									-17.4%
<b>Highway Count 2017 (000's of vehicles) <sup>2</sup></b>													
Hwy 1 -Sask border w-bound	57.7	57.7	65.2										180.6
Per cent change from 2016	1.1%	0.4%	-8.2%										-2.7%
Hwy 1 - Banff Pk Gate (2-way)	538.7	525.2	591.6										1655.5
Per cent change from 2016	-0.6%	-4.6%	-5.5%										-3.7%
Hwy 16 - Jasper Pk Gate (2-way)	89.8	87.7	110.3										287.8
Per cent change from 2016	-0.3%	-1.5%	-7.2%										-3.4%
Hwy 16 - Blackfoot w-bound	143.9	141.8	160.4										446.1
Per cent change from 2016	0.0%	1.9%	0.1%										0.6%
<b>National Park Attendance (000's of visitors) 2017<sup>3</sup> Does not include Group Tours</b>													
Banff	201.7	<b>201.6</b>	<b>228.4</b>	<b>267.8</b>									<b>899.5</b>
Per cent change from 2016	2.6%	<b>-5.0%</b>	<b>-4.5%</b>	<b>10.4%</b>									<b>1.0%</b>
Jasper	51.2	<b>52.0</b>	<b>64.9</b>	<b>151.1</b>									<b>319.2</b>
Per cent change from 2016	0.3%	<b>-5.8%</b>	<b>-9.4%</b>	<b>7.7%</b>									<b>0.3%</b>
Waterton Lakes	9.2	9.6	12.7	<b>20.4</b>									<b>51.9</b>
Per cent change from 2016	8.7%	-16.9%	-3.3%	<b>4.1%</b>									<b>-1.5%</b>
Elk Island	17.9	18.8	22.6	<b>26.3</b>									<b>85.6</b>
Per cent change from 2016	29.6%	16.4%	16.5%	<b>-5.7%</b>									<b>10.7%</b>
Wood Buffalo	0.02	0.01	0.01										0.05
Per cent change from 2016	214.3%	-72.2%	-39.1%										-34.3%
<b>Employment (000's of persons) 2017 Seasonally Adjusted <sup>4</sup></b>													
Accommodation and Food Services	143.8p	<b>144.9p</b>	<b>146.4p</b>	<b>147.5p</b>									<b>145.7p</b>
Per cent change from 2016	4.4%	<b>6.5%</b>	<b>5.6%</b>	<b>5.8%</b>									<b>5.3%</b>

Sources: Edmonton International Airport, Calgary International Airport, Fort McMurray International Airport, Alberta Transportation, Parks Canada, and Statistics Canada.

Accommodation Indices for Major Regions 2017 <sup>5</sup>													
	Jan.	Feb.	Mar.	Apr.	May	June	July	August	Sept.	Oct.	Nov.	Dec.	Yr-to-Date
Edmonton Occupancy Rate	46.8%	56.7%	<b>62.0%</b>										55.2%
Point change from 2016	-3.1	-1.7	<b>0.8</b>										-1.2
Average Daily Room Rate	\$128.56	\$133.48	<b>\$133.13</b>										\$131.94
Variance from 2016	-1.0%	0.1%	<b>0.3%</b>										-0.1%
Revenue per available room	\$60.13	\$75.67	<b>\$82.48</b>										\$72.84
Calgary Occupancy Rate	42.5%	50.8%	<b>53.0%</b>										48.7%
Point change from 2016	-3.1	0.5	<b>-0.4</b>										-1.1
Average Daily Room Rate	\$134.61	\$138.79	<b>\$138.10</b>										\$137.28
Variance from 2016	-4.7%	-1.5%	<b>-1.2%</b>										-2.4%
Revenue per available room	\$57.15	\$70.45	<b>\$73.26</b>										\$66.83
Alberta Resorts Occupancy Rate	42.9%	53.2%	<b>56.4%</b>										50.7%
Point change from 2016	0.2	-1.0	<b>0.7</b>										0.0
Average Daily Room Rate	\$195.37	\$206.57	<b>\$198.74</b>										\$200.32
Variance from 2016	6.8%	6.5%	<b>2.4%</b>										4.9%
Revenue per available room	\$83.72	\$109.80	<b>\$112.13</b>										\$101.60
Other Alberta** Occupancy Rate	37.4%	42.0%	<b>46.0%</b>										41.8%
Point change from 2016	2.2	2.7	<b>6.1</b>										3.7
Average Daily Room Rate	\$115.85	\$115.98	<b>\$115.99</b>										\$115.94
Variance from 2016	-5.2%	-6.0%	<b>-3.8%</b>										-4.9%
Revenue per available room	\$43.33	\$48.72	<b>\$53.38</b>										\$48.49
Total Alberta (excl. Resorts) Occupancy Rate	41.6%	48.9%	<b>52.8%</b>										47.7%
Point change from 2016	-0.8	1.0	<b>3.0</b>										1.1
Average Daily Room Rate	\$125.81	\$129.01	<b>\$128.57</b>										\$127.89
Variance from 2016	-3.9%	-2.4%	<b>-1.7%</b>										-2.6%
Revenue per available room	\$52.33	\$63.03	<b>\$67.83</b>										\$61.05
<b>Food Services and Drinking Places 2017 (\$ Millions) unadjusted<sup>6</sup></b>													
Total Receipts for Alberta	<b>693.24r</b>	<b>677.54p</b>											685.39p
Per cent change from 2016	<b>1.8%</b>	<b>-0.3%</b>											0.7%
<b>Historic Sites and Museums 2017 (000's of visitors)<sup>7</sup></b>													
Visitor Attendance***	10.5p	<b>25.3p</b>	27.5p	<b>36.9p</b>									100.2p
Per cent change from 2016	-0.9%	<b>2.9%</b>	-24.2%	<b>10.8%</b>									-6.0%
<b>Exchange Rates 2017<sup>8</sup></b>													
Canadian Dollar/U.S. Dollar (noon)	0.76	0.76	0.75	<b>0.74</b>									0.75
Canadian Dollar/ Euro	0.71	0.72	0.70	<b>0.69</b>									0.71
Canadian Dollar/ Great British Pounds	0.61	0.61	0.61	<b>0.59</b>									0.61
<b>Oil Price: Western Texas Intermediate (WTI) 2017<sup>9</sup></b>													
Cushing, OK Spot Price (US Dollar per Barrel)	52.5	53.47	49.33	<b>51.06</b>									51.59
<b>Major Tourism Projects Valued \$5 million or Greater 2017 (\$ Millions)<sup>10</sup></b>													
Total Value of Hotel Projects Inventory	\$666	\$499	<b>\$449</b>										\$449

Sources: CBRE Hotels Trends in the Hotel Industry National Market Report, Statistics Canada, Alberta Culture, Bank of Canada, WTI, Government of Alberta.

\*Commercial Air Service suspended from May 5-June 10 due to wildfire

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

\*\*\*Please note some of the historical sites have changed their hours of operation - see Notes section for details.

**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. From September 2015, total domestic passengers at Fort McMurray International Airport has been added.

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). <http://www.transportation.alberta.ca/3459.htm>

**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 [www.cbre.ca](http://www.cbre.ca)

**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 14 historic sites, the Royal Tyrrell Museum of Palaeontology and the Tyrrell Field Station. \*\*The Royal Alberta Museum closed on December 6, 2015.

Source: Alberta Culture and Tourism.

**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/>

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