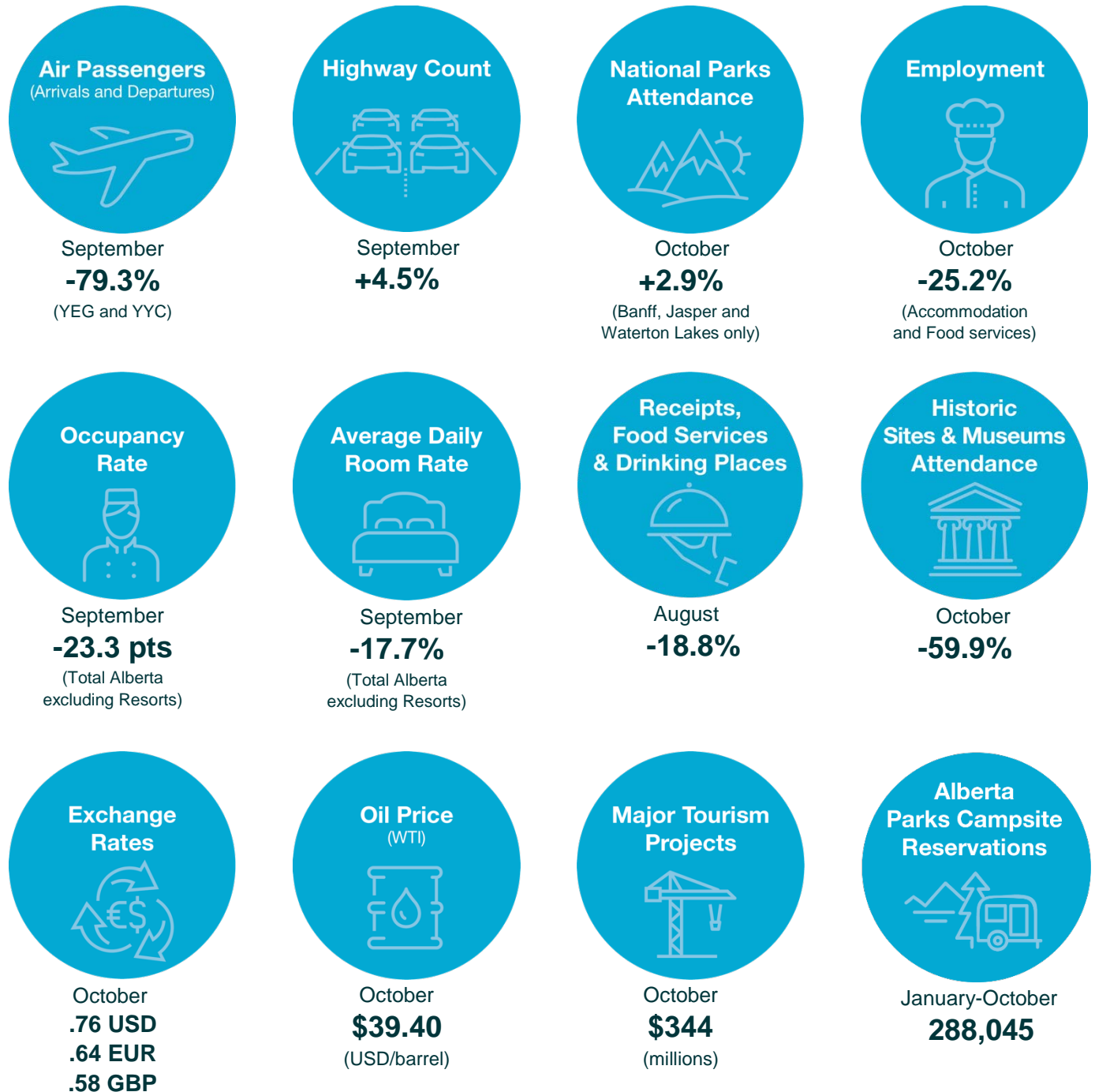


Alberta Tourism Market Monitor November 2020



Please note: Alberta announced the first case of COVID-19 on March 5 and declared a state of emergency on March 17, 2020. All non-essential businesses were asked to close on March 27, 2020. Alberta's phased relaunch began on May 14, 2020. All Parks Canada facilities were temporarily closed from March 25, 2020, and opened for day use on June 1, 2020. All provincial parks closed on March 17 and reopened on May 14, 2020. The Royal Alberta Museum and Royal Tyrrell Museum opened on May 16 and 22, respectively while another five historical sites opened on June 20, 2020.

<https://www.alberta.ca/tourism-industry-market-information.aspx>

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Alberta

2020 Alberta Tourism Market Monitor

Alberta Jobs, Economy and Innovation

	Jan.	Feb.	Mar.	Apr.	May	June	July	August	Sept.	Oct.	Nov.	Dec.	Yr-to-Date
Air Passengers 2020 (000's of arrivals and departures) ¹													
Edmonton International Total	583.3p	569.0p	344.1p	22.1p	27.5p	57.5p	115.3p	139.0p	117.0p				1,975.0p
Per cent change from 2019	-5.3%	-5.5%	-47.6%	-96.5%	-95.7%	-90.9%	-83.7%	-81.0%	-80.7%				-66.1%
Domestic	436.6p	424.5p	271.8p	21.7p	27.0p	56.8p	115.1p	139.0p	117.0p				1,609.3p
Per cent change from 2019	-5.1%	-4.4%	-44.8%	-95.6%	-95.0%	-89.8%	-81.7%	-76.8%	-80.7%				-66.4%
Transborder	81.6p	82.3p	41.7p	0.4p	0.4p	0.8p	0.2p	0.0p	0.0p				207.7p
Per cent change from 2019	-15.4%	-18.8%	-59.9%	-99.6%	-99.4%	-98.7%	-99.7%	-100.0%	-100.0%				-70.6%
International	65.1p	62.2p	30.6p	0.0p	0.0p	0.0p	0.0p	0.0p	0.0p				157.9p
Per cent change from 2019	10.1%	9.7%	-49.9%	-100.0%	-100.0%	-100.0%	-100.0%	-100.0%	-100.0%				-52.2%
Calgary International Total	1334.4r	1334.7r	814.3r	68.1r	81.0p	142.3p	288.7p	371.6p	326.1p				4761.3p
Per cent change from 2019	-3.9%	-0.5%	-45.1%	-95.2%	-94.5%	-91.0%	-83.8%	-79.3%	-78.7%				-65.4%
Domestic	878.5r	876.1r	549.1r	66.1r	78.4p	138.3p	278.5p	357.8p	310.6p				3,533.6p
Per cent change from 2019	-6.4%	-1.4%	-45.3%	-93.1%	-92.6%	-87.6%	-78.3%	-72.5%	-71.5%				-63.2%
Transborder	279.1p	283.1	154.6r	1.6p	2.6p	4.0p	8.2p	9.1p	9.4p				751.8p
Per cent change from 2019	5.0%	3.5%	-51.3%	-99.4%	-99.0%	-98.7%	-97.5%	-97.2%	-96.8%				-71.9%
International	176.8p	175.5r	110.5r	0.3p	0.0p	0.0p	2.0p	4.7p	6.1p				475.9p
Per cent change from 2019	5.0%	-2.3%	-43.2%	-99.8%	-100.0%	-100.0%	-98.8%	-97.2%	-95.8%				-68.2%
Fort McMurray International Total	45.7	43.5	29.0	3.9	4.3	7.9	14.5	16.9	16.1				165.7
Per cent change from 2019	-6.5%	-8.1%	-42.0%	-92.2%	-91.6%	-83.8%	-72.5%	-67.9%	-66.8%				-58.7%
Highway Count 2020 (000's of vehicles) ²													
Hwy 1 - Sask border w-bound	57.3	60.2	56.4	41.8	56.7	69.5	89.4	100.2	83.2				614.6
Per cent change from 2019	-1.6%	13.8%	-13.1%	-41.6%	-28.7%	-19.3%	-17.1%	-11.8%	3.2%				-14.1%
Hwy 1 - Banff Pk Gate (2-way)	545.7	571.1	434.6	257.0	448.7	672.7	1,016.8	1,112.7	816.2				5,875.5
Per cent change from 2019	-4.6%	23.9%	-31.1%	-57.3%	-36.9%	-19.2%	-4.2%	-0.6%	6.8%				-13.0%
Hwy 16 - Jasper Pk Gate (2-way)	99.9	104.6	100.1	72.8	109.9	155.2	218.7	252.2	174.1				1287.4
Per cent change from 2019	1.3%	28.6%	-23.7%	-48.1%	-41.6%	-20.2%	-20.3%	-4.9%	2.8%				-16.6%
Hwy 16 - Blackfoot w-bound	141.5	142.6	123.3	88.4	119.1	139.5	157.2	165.4	160.8				1237.9
Per cent change from 2019	-3.6%	6.6%	-24.1%	-46.5%	-33.3%	-17.6%	-16.7%	-13.7%	-4.1%				-17.7%
National Park Attendance (000's of visitors) 2020 ³ Does not include group tours													
Banff*	199.1	210.0	155.2	0.0	0.0	271.3	581.2	638.9	465.5	147.4			2,668.7
Per cent change from 2019	-4.3%	18.1%	-34.4%	-100.0%	-100.0%	-30.3%	-15.6%	-11.7%	-1.4%	-1.5%			-26.4%
Jasper*	61.2	60.2	55.5	0.0	0.0	176.4	399.06	442.9	319.6	62.2			1,577.0
Per cent change from 2019	9.3%	25.6%	-27.2%	-100.0%	-100.0%	-25.9%	-14.8%	-10.7%	-0.1%	3.7%			-26.1%
Waterton Lakes*	10.6**	8.2	8.6	0.0	0.0	54.0	113.3	120.4	64.5	25.1			404.6
Per cent change from 2019	27.6%	34.1%	-21.4%	-100.0%	-100.0%	-29.5%	7.9%	15.9%	15.0%	35.3%			-7.4%
Elk Island*	13.7	15.8	18.3	0.0	0.0	52.3	81.6	80.2	54.8	35.5			352.2
Per cent change from 2019	-2.4%	70.4%	-9.1%	-100.0%	-100.0%	0.1%	34.9%	31.4%	26.5%	49.9%			-1.8%
Wood Buffalo*	0.02	0.1	0.02	0.0	0.0	0.13	0.32	0.47	0.21	0.23			1.5
Per cent change from 2019	-18.5%	2.8%	-40.7%	-100.0%	-100.0%	-86.2%	-67.8%	-58.4%	-31.6%	-18.4%			-67.5%
Employment (000's of persons) 2020 Seasonally Adjusted ⁴													
Accommodation and Food Services	156.6	156.8	113.1	77.5	85.2	91.7	111.4	114.5	113	112.1			113.7
Per cent change from 2019	9.7%	7.9%	-23.2%	-46.2%	-39.7%	-34.7%	-19.2%	-19.0%	-23.3%	-25.2%			-21.4%
Sources: Edmonton International Airport, Calgary International Airport, Fort McMurray International Airport, Alberta Transportation, Parks Canada and Statistics Canada.													
Accommodation Indices for Major Regions*** 2020 ⁵													
	Jan.	Feb.	Mar.	Apr.	May	June	July	August	Sept.	Oct.	Nov.	Dec.	Yr-to-Date
Edmonton Occupancy Rate	43.5%	52.8%	29.1%	11.6%	15.9%	22.9%	26.7%	34.0%	30.2%				30.4%
Point change from 2019	-5.7	-3.9	-32.2	-48.7	-43.4	-38.8	-31.6	-22.9	-24.8				-27.2
Average daily room rate	\$121.86	\$125.11	\$119.40	\$93.23	\$98.00	\$101.94	\$110.2	\$115.50	\$109.47				\$115.06
Variance from 2019	-3.1%	-3.0%	-8.5%	-27.9%	-22.8%	-18.9%	-9.6%	-4.9%	-15.7%				-9.1%
Revenue per available room	\$52.98	\$66.08	\$34.71	\$10.82	\$15.63	\$23.30	\$29.41	\$39.23	\$33.03				\$34.98
Calgary Occupancy Rate	44.6%	52.2%	27.7%	9.1%	11.2%	17.7%	23.4%	29.2%	27.3%				28.1%
Point change from 2019	-2.4	-1.7	-25.5	-48.1	-48.7	-51.4	-56.8	-46.9	-42.7				-35.0
Average daily room rate	\$131.38	\$134.55	\$126.86	\$93.82	\$93.54	\$95.74	\$103.96	\$104.10	\$104.78				\$117.74
Variance from 2019	-3.7%	-1.6%	-5.4%	-31.6%	-35.3%	-36.8%	-41.2%	-25.5%	-29.1%				-19.8%
Revenue per available room	\$58.57	\$70.23	\$35.12	\$8.51	\$10.47	\$16.98	\$24.28	\$30.39	\$28.59				\$33.12
Alberta Resorts Occupancy Rate	50.1%	59.6%	26.5%	7.1%	16.3%	29.1%	50.2%	60.8%	47.5%				41.6%
Point change from 2019	1.9	3.1	-33.0	-44.5	-51.1	-55.2	-42.3	-32.1	-38.1				-29.3
Average daily room rate	\$239.13	\$244.52	\$232.94	\$100.79	\$100.54	\$212.77	\$274.27	\$293.97	\$270.72				\$247.01
Variance from 2019	12.4%	16.7%	10.4%	-49.8%	-60.9%	-44.0%	-38.0%	-32.9%	-33.5%				-25.1%
Revenue per available room	\$119.72	\$145.73	\$61.70	\$7.15	\$16.36	\$61.83	\$137.68	\$178.80	\$128.53				\$102.66

	Jan.	Feb.	Mar.	Apr.	May	June	July	August	Sept.	Oct.	Nov.	Dec.	Yr-to-Date
Other Alberta**** Occupancy Rate	38.2%	45.0%	31.0%	15.1%	21.0%	28.5%	34.7%	41.1%	44.3%				33.6%
Point change from 2019	-2.7	-2.6	-18.4	-30.6	-28.9	-25.7	-22.1	-15.8	-9.2				-17.0
Average daily room rate	\$114.51	\$116.43	\$110.98	\$101.21	\$104.53	\$105.15	\$106.96	\$107.88	\$108.70				\$109.63
Variance from 2019	-1.2%	-1.2%	-4.3%	-12.7%	-10.8%	-11.4%	-12.8%	-10.9%	-7.5%				-7.3%
Revenue per available room	\$43.73	\$52.43	\$34.41	\$15.28	\$21.90	\$29.95	\$37.07	\$44.29	\$48.14				\$36.85
Total Alberta (excl. Resorts):Occupancy Rate	41.6%	49.4%	29.5%	12.5%	17.0%	23.9%	29.1%	35.5%	35.4%				31.2%
Point change from 2019	-3.4	-2.6	-24.3	-40.6	-38.4	-36.8	-35.0	-27.0	-23.3				-25.1
Average daily room rate	\$121.92	\$124.62	\$117.79	\$97.72	\$100.96	\$102.34	\$107.11	\$109.09	\$108.04				\$113.17
Variance from 2019	-2.6%	-1.8%	-6.4%	-23.0%	-21.7%	-22.4%	-24.9%	-14.7%	-17.7%				-13.0%
Revenue per available room	\$50.66	\$61.51	\$34.71	\$12.26	\$17.21	\$24.45	\$31.17	\$38.74	\$38.25				\$35.28

Accommodation Indices for Selected Cities or Towns**** 2020⁶

Occ%= Occupancy Rate Room Rate RevPar= Revenue Per Available Room	September			Year-To-Date				September			Year-To-Date		
	Occ%	ADR	RevPar	Occ%	ADR	RevPar		Occ%	ADR	RevPar	Occ%	ADR	RevPar
	Airdrie	41.2	\$85.85	\$35.36	34.5	\$85.87		\$29.59	Banff	49.9	\$217.22	\$108.50	40.8
Bonnyville	36.9	\$83.32	\$30.78	38.0	\$83.34	\$31.64	Canmore	55.1	\$181.09	\$99.79	41.3	\$163.77	\$67.56
Drayton Valley	32.4	\$100.70	\$32.63	29.0	\$100.04	\$29.03	Drumheller	41.9	\$127.31	\$53.35	31.7	\$128.52	\$40.78
Edson	74.6	\$110.83	\$82.62	55.0	\$109.35	\$60.16	Fort Mac	54.3	\$126.88	\$68.94	43.4	\$128.75	\$55.92
Fort Saskatchewan	32.7	\$85.97	\$28.10	25.4	\$91.28	\$23.15	Gr. Prairie	41.9	\$123.84	\$51.83	37.7	\$126.76	\$47.82
High Level	48.7	\$119.94	\$58.36	46.3	\$126.07	\$58.35	Hinton	56.6	\$109.53	\$62.02	42.7	\$103.58	\$44.21
Jasper	56.5	\$262.96	\$148.50	44.6	\$229.89	\$102.59	Leduc	20.8	\$84.68	\$17.62	26.0	\$89.35	\$23.24
Lethbridge	35.2	\$92.89	\$32.69	29.2	\$97.99	\$28.61	Lloydminster	89.4	\$125.92	\$112.51	37.1	\$112.21	\$41.62
Med. Hat	66.8	\$100.88	\$67.38	38.2	\$100.71	\$38.43	Nisku	22.1	\$84.21	\$18.63	25.3	\$90.74	\$22.99
Red Deer	25.1	\$93.67	\$23.49	21.4	\$98.38	\$21.08	Sherwood Pk.	28.2	\$96.83	\$27.28	23.5	\$100.18	\$23.54
Whitecourt	35.4	\$98.60	\$34.88	32.2	\$99.77	\$32.10	Total Alberta	37.4	\$130.46	\$48.73	32.3	\$130.02	\$41.98

Sources: CBRE Hotels Trends in the Hotel Industry National Market Report and STR Inc.

Food Services and Drinking Places 2020 (\$ Millions) unadjusted⁷

Total Receipts for Alberta	739.16r	752.61r	532.16r	344.93r	496.75r	651.67r	707.85p	725.41p					618.82p
Per cent change from 2019	0.5%	6.7%	-35.5%	-56.5%	-41.9%	-24.7%	-20.4%	-18.8%					-24.6%

Historic Sites and Museums 2020 (000's of visitors) ⁸

Visitor Attendance*	25.4p	60.1p	12.6r	0.0p	5.5p*****	22.1p	43.0p	45.4p	30.3p	19.5p			263.9p
Per cent change from 2019	-31.4%	-0.6%	-79.3%	-100.0%	-91.7%	-81.6%	-76.6%	-75.7%	-64.2%	-59.9%			-71.1%

Exchange Rates 2020⁹

Canadian Dollar / U.S. Dollar (noon)	0.76	0.75	0.72	0.71	0.72	0.74	0.74	0.76	0.76	0.76			0.74
Canadian Dollar / Euro	0.69	0.69	0.65	0.65	0.66	0.66	0.65	0.64	0.64	0.64			0.66
Canadian Dollar / British Pounds	0.58	0.58	0.58	0.57	0.58	0.59	0.58	0.58	0.58	0.58			0.58

Oil Price: Western Texas Intermediate (WTI) 2020¹⁰

Cushing, OK Spot Price (U.S. Dollar per barrel)	57.68	50.54	29.21	16.55	28.56	38.31	40.71	42.34	39.63	39.40			38.28
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Major Tourism Projects Valued \$5 million or Greater 2020 (\$ Millions)¹¹

Total Value of Hotel Projects Inventory	\$327	\$327	\$327	\$349	\$349	\$349	\$334	\$334	\$344	\$344			\$344
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Alberta Provincial Parks Campsite Reservations 2020 Year-To-Date¹²

Reservations made on Reserve.AlbertaParks.ca*****	26	145	19,565	19,334	90,012	181,570	236,432	274,423	286,657	288,045			288,045
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Sources: Statistics Canada, Alberta Culture, Multiculturalism and Status of Women, Bank of Canada, WTI, Government of Alberta, Alberta Environment and Parks.

*All Parks Canada facilities temporarily closed on March 25, 2020 and re-opened for day visitors on June 1, 2020. All provincial parks, historic sites and museums closed on March 17, 2020 and remained closed in April, 2020.

**The number for January 2020 was a calculated average.

***Closed properties were not included. More reference can be found here: https://f.tlcollect.com/fr2/520/46295/CBRE_Hotels_Canadian_Hotel_Industry_Outlook.mp4.

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

*****Per STR's data reporting guidelines, they only close properties if they were closed for a full calendar month (i.e. March 1 – March 31). If a property was open March 1-14, but closed March 15-31, they would consider that property open for the full month. STR's full Data Reporting Guidelines are available here: https://str.com/sites/default/files/2019-11/str-data-reporting-guidelines-english_0.pdf.

*****The Royal Alberta Museum reopened on May 16, 2020. The Royal Tyrrell Museum reopened on May 22, 2020. Frank Slide, Reynolds, Remington Carriage Museum, Oil Sands Discovery Centre and Ukrainian Village opened on June 20, 2020

*****All reservations made in Jan-March were cancelled and refunded due to COVID-19. On May 14, Alberta entered Stage 1 of Alberta's Relaunch Strategy, with ReserveAlbertaParks.ca (RAP) relaunching at 50% capacity. On June 12, Alberta entered Stage 2 of Alberta's Relaunch Strategy, with campgrounds moving toward 100% capacity across the system by July 1. Group Camping Reservations opened on July 14.

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. Since September 2015, total domestic passengers at Fort McMurray International Airport has been added, which comprise commercial and charter passengers.

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). <https://www.alberta.ca/highway-traffic-counts.aspx>

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.

<https://www150.statcan.gc.ca/t1/tbl1/en/tv.action?pid=1410035501>

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

<https://www.cbre.ca/en/real-estate-services/business-lines/valuation-and-advisory-services/hotels-valuation-and-advisory-services/disclaimer>

6. Accommodation Indices for Selected Cities or Towns - Destination reports are publications of Smith Travel Research Inc. (STR). Terms and conditions governing the ownership, distribution and use of these Destination Reports and their contents include that no historic data can be published, only current month and year-to-date data.

Source: STR, LLC. Republication or other re-use of this data without the express written permission of STR is strictly prohibited.

7. 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.

<https://www150.statcan.gc.ca/t1/tbl1/en/tv.action?pid=2110001901>

8. Historic Sites and Museums - Visitor attendance figures are monthly totals based on 18 historic sites and museums. The Royal Alberta Museum opened on Oct 3, 2018 after closure on December 6, 2015. Data for Brooks Aqueduct is no longer collected starting June 2018.

Source: Alberta Culture, Multiculturalism and Status of Women.

9. Exchange Rate - This is the average monthly exchange rate.

Source: Bank of Canada.

<https://www.bankofcanada.ca/rates/exchange/monthly-exchange-rates/>

10. Western Texas Intermediate - This is the average monthly oil price.

Source: Cushing, OK WTI Spot Price FOB.

<https://www.eia.gov/dnav/pet/hist/LeafHandler.ashx?n=PET&s=RWTC&f=M>

11. 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/>

12. Alberta Provincial Parks Campsite Reservations - Individual campsites, group camping areas, comfort camping and backcountry camping reservations are included. Note that reservation statistics reflect the month the reservation was made, and not the date of stay. Only sites available on the Reserve.AlbertaParks.ca are captured. Non-reservable sites that are First Come First Served and sites available for phone-in reservation only are not captured and thus not reflected.

Source: Alberta Environment and Parks.

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