

Tourism in Alberta 2014

A Summary of 2014 Visitor Numbers, Expenditures and Characteristics July 2016

Introduction

Whether to see their friends and relatives, for business or for pleasure, 34.7 million total person-visits were made in 2014 to destinations in Alberta by residents of Alberta, other parts of Canada, the United States and overseas countries.

To better understand the volume and characteristics of these visitors, Alberta Culture and Tourism has prepared special analyses of the 2014 Travel Survey of Residents of Canada (TSRC) and the 2014 International Travel Survey (ITS), which are both conducted by Statistics Canada. These consumer surveys provide tourism information for travel in Alberta by Canadians and trips to the province made by visitors from the U.S. and overseas. Data in this publication includes same-day and overnight trips for Albertans and residents from other parts of Canada, and overnight trips only for U.S. and overseas visitors.

Readers are cautioned that estimates for 2013 and 2014 are not comparable with previous years (2012 and earlier), as Statistics Canada made a major file structure change in 2013. Data was suppressed so that the 2013 and 2014 data has considerably less detail than what was available in 2012 and earlier.

This summary highlights key findings only. For more information on tourism in Alberta, please contact Alberta Culture and Tourism or visit <http://culture.alberta.ca/tourism/>.

Who Travels in Alberta and how much do they spend?

All trips

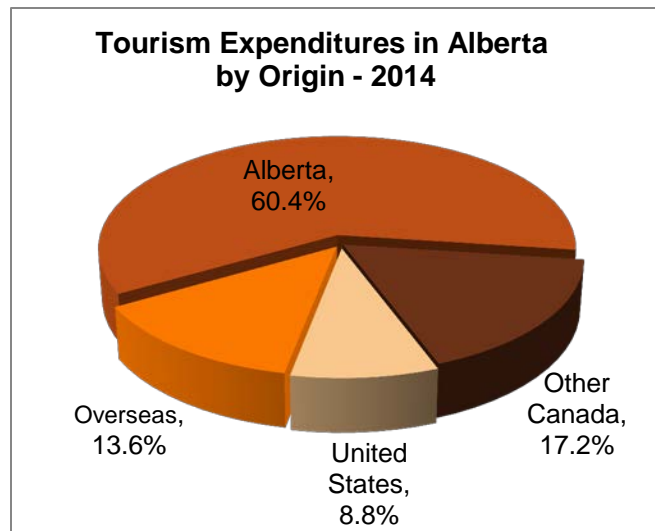
More visits in Alberta are made by residents of Alberta than by other Canadians, U.S. and overseas visitors combined. Of the 34.7 million total visits in the province, 29.8 million (85.9%) were by Albertans. Another 3.2 million (9.3%) were by residents of other parts of Canada. The remaining 1.7 million visits (4.8%) came from the U.S. (2.2%) and overseas (2.6%).

Albertans living in the Calgary and area tourism region travelled more within Alberta than any other segment of the province's population with 23.2% of all visits in 2014. Residents of the Alberta central tourism region followed with 22.9%, and residents of the Edmonton and area tourism region accounted for 20.4% of all provincial tourism visits. Residents of British Columbia accounted for 3.6% of all visits to Alberta, while residents of Saskatchewan accounted for 3.1%.

In 2014, 34.7 million total person-visits were made to Alberta. Direct tourism expenditures by these visitors amounted to approximately \$8.3 billion.

Total Visitation and Tourism Expenditures in Alberta - 2014					
	Alberta	Other Canada	United States	Overseas	Total
('000s)					
Person-Visits	29,788	3,228	772	896	34,684
Tourism Expenditures	\$5,014,571	\$1,423,774	\$731,138	\$1,130,011	\$8,299,494

Residents of Alberta accounted for 60% of direct visitor spending in Alberta, while visitors from other parts of Canada accounted for 17%. Visitors from the United States accounted for 9% of direct tourism expenditure in the province and overseas visitors accounted for 14%.



Overnight trips

Approximately 39.2% of all visits in the province included at least one overnight stop, yielding 13.6 million overnight visits in 2014. Approximately 26.5% of all visits in the province by Albertans included spending one or more nights away from home (9.2 million).

Residents of the Edmonton and area tourism region accounted for one-fifth (20.1%) of all overnight travel in the province in 2014, with residents of the Calgary and area tourism region following close behind with 17.6%. Residents of the Alberta central tourism region accounted for 15.0% of total overnight visits, the Alberta south tourism region 6.9%, the Alberta north tourism region 6.8% and, lastly, the Canadian Rockies tourism region accounted for 1.2% of total overnight visits within the province.

Residents of British Columbia accounted for 7.9% of all overnight travel, residents of Saskatchewan 6.0% and residents of Ontario 3.5%.

Major inbound overnight markets

Key sources of overnight inbound travel to Alberta include neighbouring provinces, the United States¹ and major European and Asian markets.

British Columbia is a substantive source of inbound, overnight travel to Alberta (1,071,000), followed by Saskatchewan (822,000) and the U.S. (772,000).

¹ Due to changes in the file structure in the International Travel Survey in 2014, the origin of U.S. travellers is available at eight regional levels, instead of at a State level. These regions include New England, Middle Atlantic, South Atlantic, East North Central, West North Central, South Central, Mountain and Pacific, Alaska and Hawaii.

With 170,000 overnight person-visits in 2014, the United Kingdom generated more overnight travel in Alberta than any other foreign country, except the United States.

Key Inbound Markets - 2014	
	Overnight Person-Visits
British Columbia	1,071,000
Saskatchewan	822,000
U.S.	772,000
Ontario	472,000
U.S.: Pacific region, Alaska and Hawaii ²	221,000
Manitoba	205,000
United Kingdom	170,000
U.S.: Mountain ³	123,000
Australia	114,000
China*	91,000
Germany	76,000
Japan	66,000

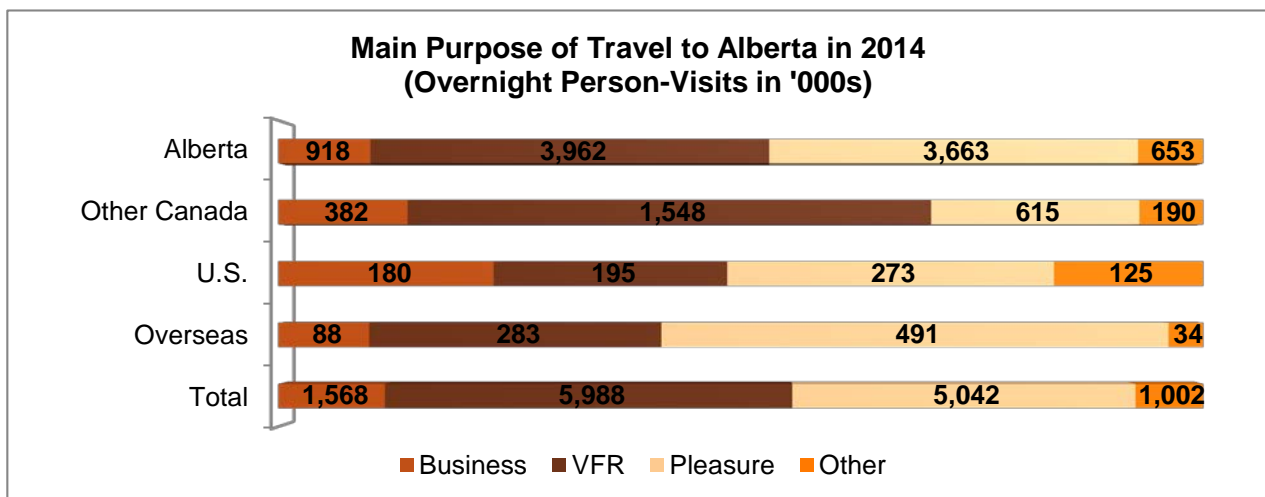
*Small sample size, use caution.

Main Purpose of Overnight Travel

There were 13.6 million overnight person-visits in Alberta in 2014. Across all markets, 44% (6 million) of all overnight person-visits to the province were to visit friends and relatives.

37% (5.04 million) of all overnight person-visits to the province were for pleasure, while business travel accounted for 12% of all overnight person-visits in the province and 7% was for other purposes.

Travelling to Alberta for the main purpose of pleasure accounted for 35% of American visitors and



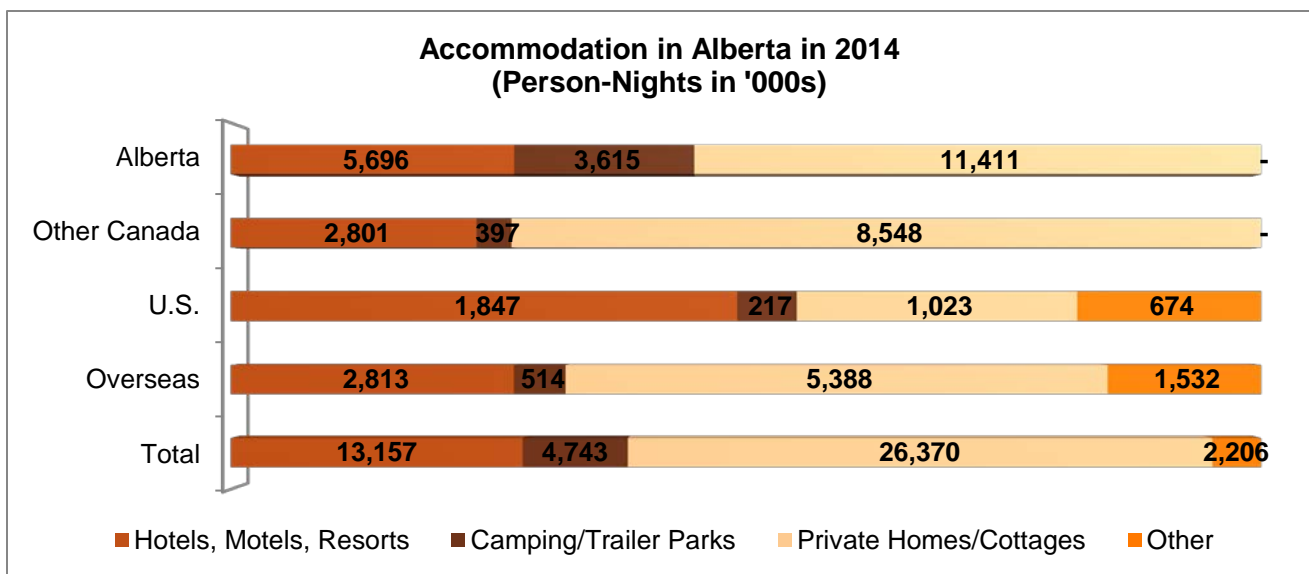
² This region includes the US states of California, Oregon, Washington, Alaska and Hawaii.

³ This region includes the American states of Arizona, Colorado, Idaho, Montana, Nevada, New Mexico, Utah and Wyoming.

more than half of overseas visitors (55%). Visiting friends and relatives accounted for 25% of overnight travel by U.S. visitors and 32% of overseas visitors. Business accounted for 10% of overnight travel by Albertans and 23% of overnight travel by visitors from the United States.

Accommodation in Alberta

Over the course of 2014, visitors spent approximately 46.48 million nights in Alberta. Twenty eight per cent of these nights (13.16 million) were spent in the province's hotels, motels, resorts, cottages, bed and breakfast establishments and other commercial, roofed properties. A further 10% were spent in campgrounds and trailer parks in the province (4.74 million). Over one-half (56.7%) of all nights spent in Alberta were in the homes of friends and relatives, private cottages and other non-commercial accommodations (26.37 million). About 5% were spent in other accommodations.



Albertans spent approximately 11.41 million nights in the homes or cottages of their friends and relatives. They also spent 5.7 million nights in the province's hotels, motels and other commercial roofed properties. Forty three per cent of all nights spent in commercial properties were by Albertans. Albertans also accounted for 76.2% of all camping nights spent in the province.

Average Length of Stay for Overnight Visitors

The average length of stay for all overnight person-visits to Alberta is 3.4 nights. Although Albertans account for the greatest number of overnight person-visits, they have the shortest average length of stay at 2.3 nights. The longest average length of stay belongs to the overseas market, with 11.4

Average Length of Stay in Alberta - 2014	
All Overnight Person-Visits	3.4
Canada	2.7
Alberta	2.3
Saskatchewan	3.2
British Columbia	3.8
Ontario	5.5
United States	4.9
Overseas	11.4

nights on average for each visit. This is not surprising due to the distance that overseas visitors must travel to get to Alberta. Visitors from Ontario have the next longest stay at 5.5 nights, followed by visitors from the United States at 4.9 nights. Visitors from British Columbia stay an average of 3.8 nights in Alberta, while visitors from Saskatchewan stay 3.2 nights on average.

Seasonality

The summer months are more likely to generate travel in Alberta than the winter months. The lure of the warmer travelling months, July through September, is especially evident for American and overseas visitors, with 46.6% of visits from the U.S. and 50.4% of visits from overseas taking place during this three month period. Approximately 80.2% of all overseas travel to Alberta is made during the six month period from April to September (Quarters 2 and 3). By way of contrast, only 11% of U.S. and 8% of overseas visitors come to Alberta during the first quarter (January, February and March), which is the smallest proportion of all visitor origins. American and overseas visitors also have the smallest proportion of person-visits to Alberta during the fourth quarter (October, November and December) at 15% and 12%, respectively.

Visitors from Alberta and other parts of Canada tend to visit the province more in the second and third quarters as well, with approximately 59% of their overnight person-visits occurring in these two quarters. Thirty-two per cent of all visitors from British Columbia visit during the third quarter and 25.7% come during the second quarter. Forty-three per cent of visitors from Ontario visit during the third quarter.

Calendar Quarter of Overnight Person-Visits in Alberta - 2014				
	January-March (Quarter 1)	April-June (Quarter 2)	July-September (Quarter 3)	October-December (Quarter 4)
All Overnight	17.6%	25.3%	36.4%	20.8%
By Market				
Canada	18.7%	24.8%	34.6%	21.8%
Alberta	18.5%	25.0%	34.4%	22.1%
British Columbia	20.7%	25.7%	32.2%	21.4%
Saskatchewan	19.2%	24.8%	34.3%	21.6%
Ontario	16.3%	24.5%	43.3%	15.9%
United States	11.3%	27.6%	46.6%	14.6%
Overseas	8.3%	29.8%	50.4%	11.5%

Overnight Tourism in Alberta's Regions

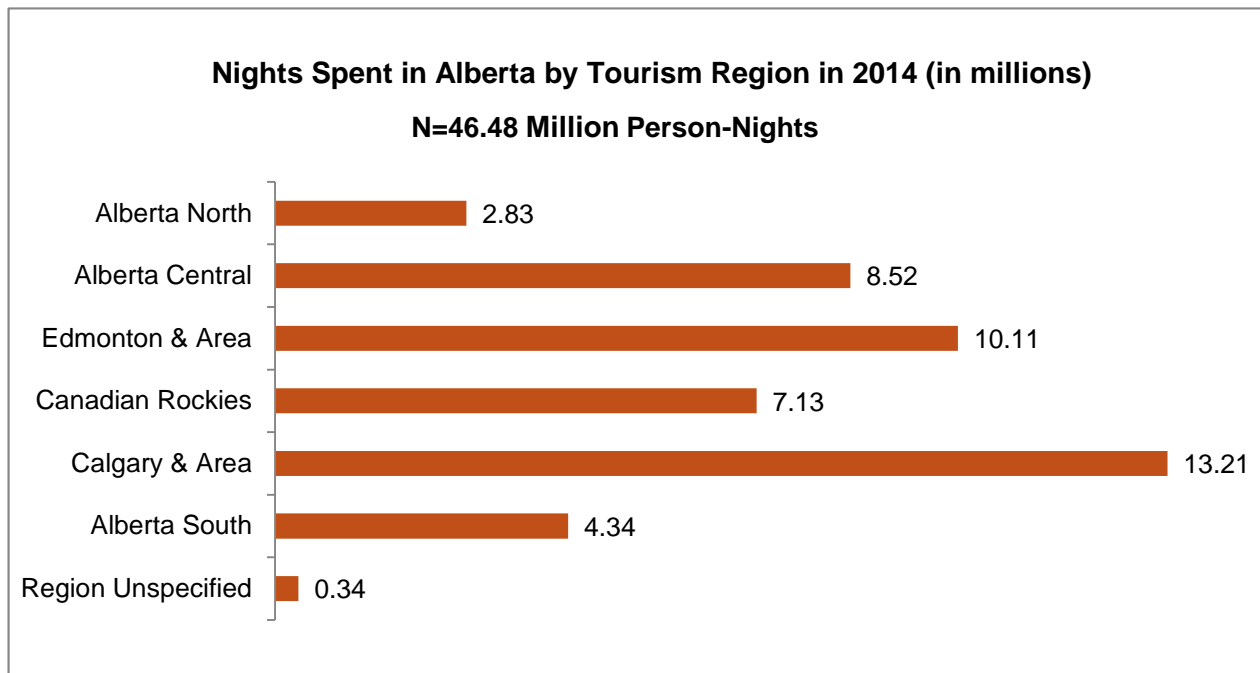
Major urban areas are magnets for overnight travel in Alberta. Over the course of 2014, just under one-third (28%) of all nights in the province were spent in the Calgary and area tourism region. The Edmonton and area tourism region (22%), Alberta central tourism region (18%) and the Canadian Rockies tourism region (15%) were each responsible for approximately one-fifth of the nights spent by visitors in the province.

Additionally, 9% of all nights were spent in the Alberta south tourism region and 6% of all nights were spent in the Alberta north tourism region. Approximately 1% of all nights spent in Alberta were in an unspecified region.

Combined, the Canadian Rockies tourism region, the Calgary and area tourism region and the Edmonton and area tourism region accounted for 65.5% of all nights spent in Alberta. The Alberta north tourism region, the Alberta central tourism region and the Alberta south tourism region accounted for 33.7% of all nights spent in Alberta, with approximately 1% being unspecified.

Person-Nights in Alberta's Regions by Market (All Purposes) – 2014			
Person-Nights	Canada (32.47 million)	U.S. (3.76 million)	Overseas (10.25 million)
Alberta North	7%	6%	3%
Alberta Central	22%	10%	9%
Edmonton and Area	22%	28%	19%
Canadian Rockies	11%	26%	26%
Calgary and Area	26%	17%	39%
Alberta South	11%	13%	3%
Region Unspecified	1%	0%	0%

The Calgary and area tourism region is the most widely visited tourism region in Alberta for overseas visitors (39%) and residents of Canada (26%). The Edmonton and area and Canadian Rockies are the top tourism regions for visitors from the United States (28% and 26%, respectively). The Canadian Rockies tourism region is the second most visited tourism region for overseas visitors (26%), while the Alberta central tourism region and Edmonton and area tourism regions accounted for 44% of total person nights for residents from Canada (22% each).



Summary of Characteristics for Overnight Visits to Alberta

Overseas visitors spend the most per person per visit to Alberta (\$1,261) and they also stay the longest on average (11.4 days). American visitors spend the most per person per night (average of \$191 per person per night). Even though overseas visitors spend the most per visit, their average spending per person per night is very similar to that of Albertan and Canadian overnight travellers (\$95 for Albertans and \$96 for overseas visitors).

Selected Characteristics for Overnight Visits to Alberta - 2014				
Description	Alberta	Other Canada	United States	Overseas
Average length of stay	2.3	4.3	4.9	11.4
Average spending per person per visit	\$212	\$423	\$947	\$1,261
Average spending per party per visit	\$351	\$656	\$1,503	\$2,029
Average spending per person per night	\$95	\$100	\$191	\$96
Average spending per party per night	\$157	\$154	\$304	\$155
Average party size	2.7	2.5	1.6	1.6

Tourism Expenditures by Category

Residents of Alberta rank number one for spending in every tourism expenditure category in Alberta. Approximately 40% of all visitor spending made by residents of Alberta in the province was on accommodation and food and beverage, while another 32% was spent on private/rental auto.

Tourism Expenditures in Alberta by Category - 2014					
	Alberta	Other Canada	United States	Overseas	Total
(\$'000s)					
Public/Local Transportation	\$450,315	\$286,749	\$73,040	\$78,437	\$888,541
Private/Rental Auto	\$1,580,331	\$233,052	\$82,090	\$82,570	\$1,978,043
Accommodation	\$568,552	\$259,903	\$300,737	\$382,834	\$1,512,026
Food and Beverage	\$1,423,748	\$401,328	\$142,539	\$269,101	\$2,236,716
Recreation/Entertainment	\$320,583	\$81,877	\$73,441	\$103,647	\$579,548
Retail/Other	\$671,043	\$160,865	\$59,290	\$213,422	\$1,104,620
Total	\$5,014,571	\$1,423,774	\$731,138	\$1,130,011	\$8,299,494

For more information, please contact Alberta Culture and Tourism:

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