

Saskatchewan Tourism Trends Report

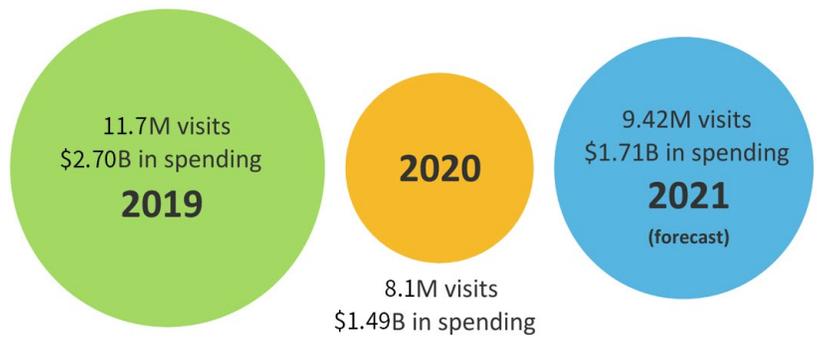
January to December 2020

COVID-19 posed an unprecedented challenge to the global tourism industry in 2020. It is estimated domestic overnight tourism in Saskatchewan shrank by 43 per cent and international visitation declined by over 85 per cent, compared to 2019.

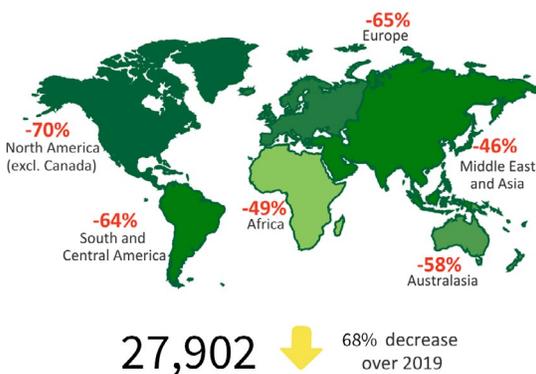
Looking ahead, the industry will start to see signs of recovery towards the fall of 2021, corresponding with widespread vaccine distribution. Full recovery to prepandemic levels is not expected until 2023.

Tourism Saskatchewan will continue monitoring and reporting industry trends to understand when recovery will start and how effectively and quickly Saskatchewan is recovering.

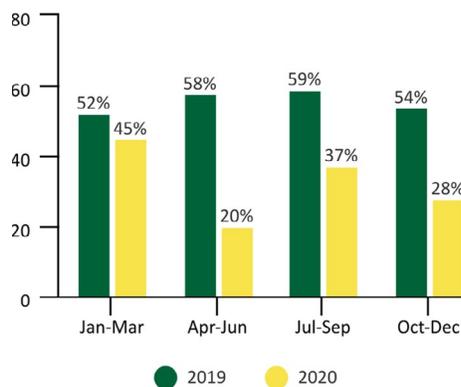
Total Visits and Tourism Expenditures



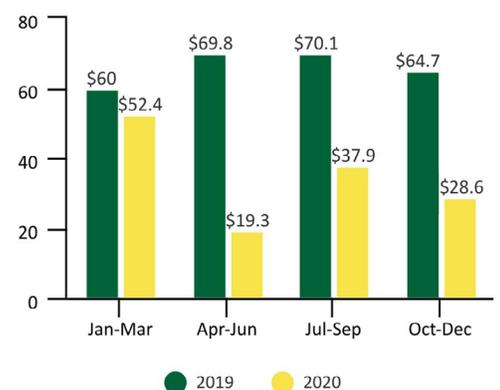
International Air Arrivals (based on ticket sales)



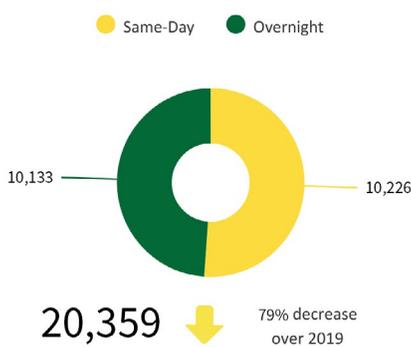
Average Occupancy at Select Fixed Roof Accommodations



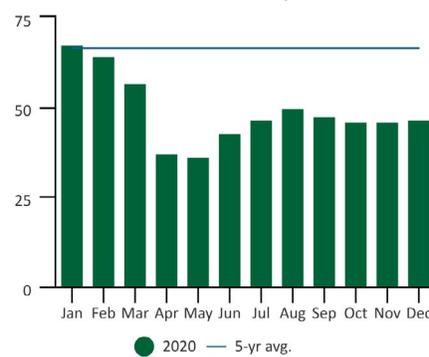
Hotel Revenue Per Available Room (RevPAR)



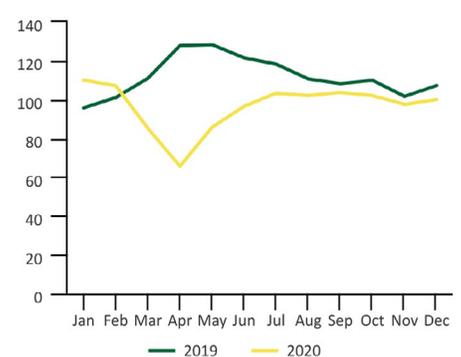
Saskatchewan Border Crossing in U.S.-licensed Automobiles



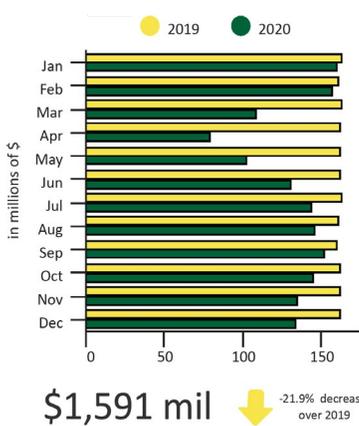
Tourism-Related Employment (in thousands of jobs)



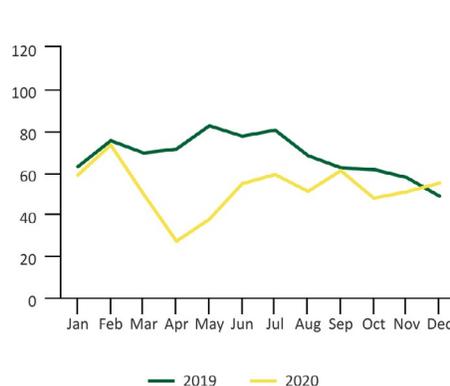
Average Retail Prices for Gasoline (cents per litre)



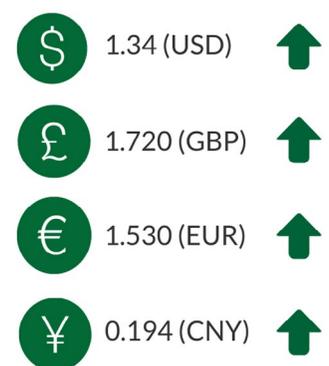
Restaurant Receipts (Jan to Nov) (in millions of dollars)



Consumer Confidence Index (Saskatchewan, Manitoba, Alberta)



Average Exchange Rate (expressed as 1 unit of foreign currency converted into CAD)



General Notes

Tourism Trends indicators cover major aspects of the tourism industry. The figures represented serve as an indication of industry and economic trends. This publication is updated quarterly with the most recent data available; however, all data is subject to ongoing revisions from data suppliers. Percentage changes listed in this publication are for changes from the same period of the previous year, unless otherwise noted.

Total Visits and Tourism Expenditures

Source: Conference Board of Canada Travel Market Outlook - Tourism. Provides a forecast of domestic and international visitation (overnight and same-day) and visitor spending for 2020 and 2021.

International Air Arrivals

Source: IATA Global Agency Pro (GAP). Represents actual airline tickets to Saskatchewan sold within the reporting period. GAP captures approximately 90 per cent of the world's travel agency airline transactions and should be used as an indicator only.

Accommodation Indicators

Source: STR, Inc. Provincial hotel occupancy rate is the percentage of available hotel rooms occupied during a specific period of time. Provincial average daily room rate (ADR) is a statistical unit used to measure a hotel's pricing scale. Provincial average revenue per available room (RevPAR) is a function of both room rates and occupancy. Figures represent a sample of hotel rooms in the province and should be used

as an indicator only. Reproduction or re-use of this data without the express written permission of STR is strictly prohibited.

Border Crossings in U.S.-licensed Automobiles

Source: Statistics Canada, reports of entries and reentries from the Canada Border Services Agency. Represents the volume of U.S. residents entering Canada through land ports in automobiles licensed in the U.S. during the reporting period. Data exclude travellers who cross the border using a NEXUS card.

Tourism-Related Employment

Source: Labour Force Survey estimates by industry, Statistics Canada. Includes full and part-time employment in tourism-related sub-sectors: accommodation, air and ground transportation, travel and reservation services, arts, culture and sport, recreation, amusement and gaming, food and beverage services, and select retailers.

Retail Prices for Regular Self-Service Gasoline

Source: Monthly average retail prices for gasoline and fuel oil, by geography, Statistics Canada, Table 18-10-0001-01

Restaurant Receipts

Source: Monthly survey of food services and drinking places, Statistics Canada, Table 21-10-0019-01 (seasonally adjusted). Reports the total dollars spent on food services and drinking places in Saskatchewan. Restaurant receipts serve as an indicator of how well the economy is doing. When the economy is strong, consumers generally have more money to spend on leisure activities, such as dining out, entertainment and

travel. Receipts data is reported on a two-month lag.

Consumer Confidence Index

Source: Conference Board of Canada, Monthly Consumer Confidence Index for the Prairie Provinces. The Consumer Confidence Index is a survey of Canadian households that measures consumers' levels of optimism regarding current economic conditions. The index is benchmarked to 2014 = 100. An indicator above 100 signals a boost in the consumers' confidence towards the future economic situation. Consequently, they may save less and spend more on major purchases. Values below 100 indicate a pessimistic attitude towards future developments in the economy, possibly resulting in a tendency to save more and consume less.

Exchange Rates

Source: Bank of Canada, exchange rates. Arrows indicate changes in the strength of a foreign currency relative to the Canadian dollar compared to the same period last year.

For more information on available research insights and data visit:

industry.tourismsaskatchewan.com