

Saskatchewan Tourism Trends Report (COVID-19 recovery)

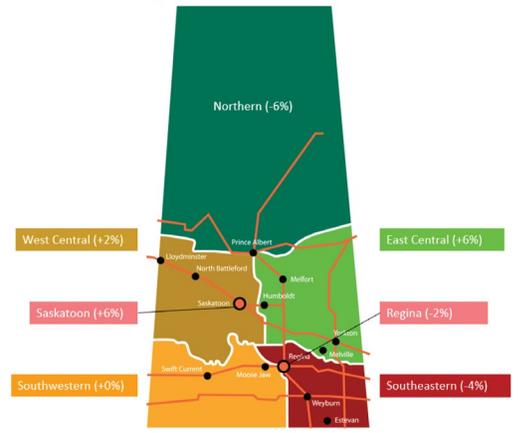
January to December 2021

The year 2021 was another cycle of learning and adapting for the tourism industry. Rising vaccination rates and the easing of travel restrictions led to a rebound in the summer. However, the Delta and Omicron variants disrupted recovery and affected traveller confidence throughout late fall and winter.

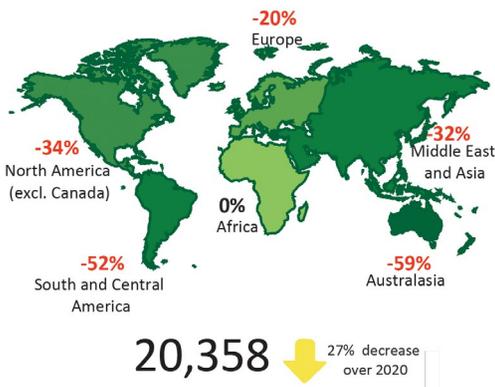
Overall, tourism indicators demonstrate modest improvement over the previous year. While the total number of domestic overall visits to and within Saskatchewan increased slightly, travellers stayed longer and spent more during their trips. Domestic visitor expenditures rose from \$1.41 billion in 2020 to an estimated \$1.61 billion in 2021. This increase was reflected in higher hotel occupancy rates, food and beverage spending, and increased consumer confidence.

As international travel slowly rebounds, domestic tourism will continue to drive recovery of the sector. Major trends in 2022 include: domestic/resident travel, trips close to home, outdoor activities, nature-based products and rural tourism.

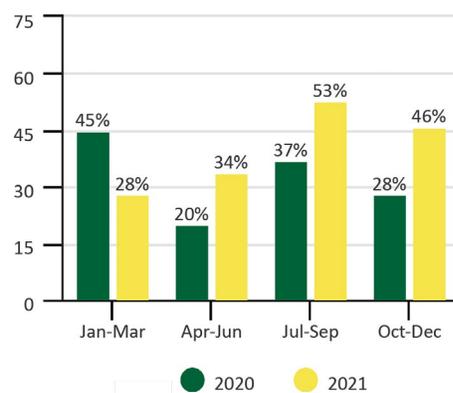
Percentage Change in Domestic Overnight Visits by Region January - December 2021 versus 2020



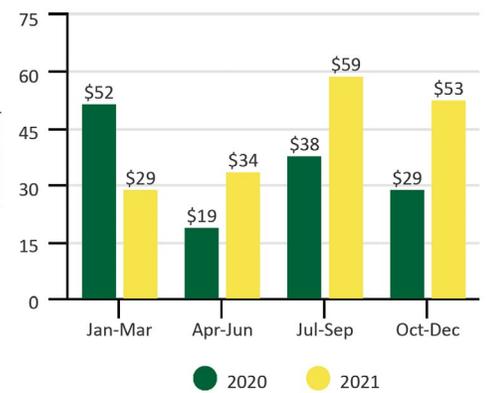
International Air Arrivals (based on ticket sales)



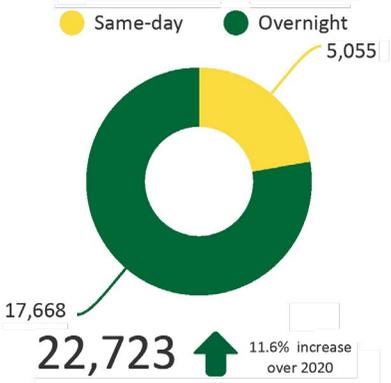
Average Occupancy at Select Fixed Roof Accommodations



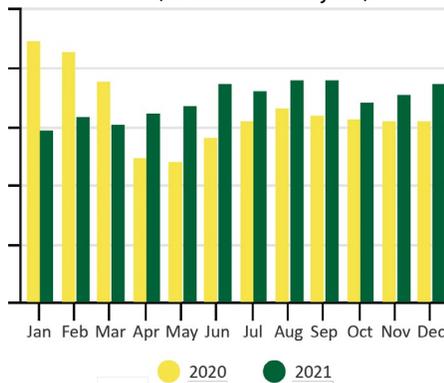
Hotel Revenue Per Available Room (RevPAR)



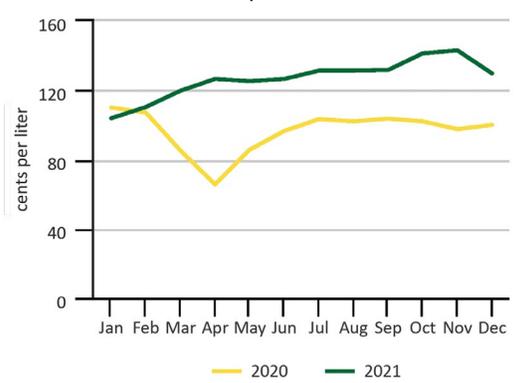
Saskatchewan Border Crossing in U.S.-licensed Automobiles



Tourism-Related Employment (in thousands of jobs)



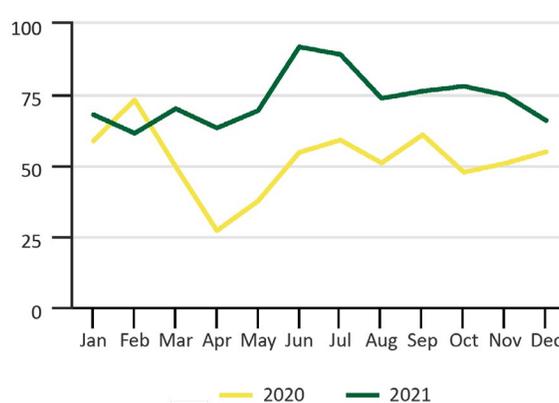
Average Retail Prices for Gasoline (cents per litre)



Restaurant Receipts (in millions of dollars)

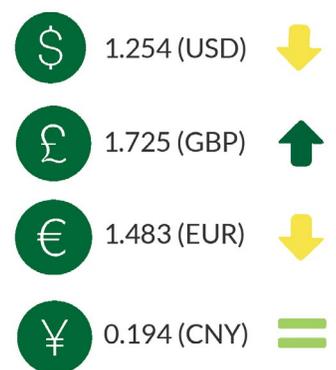


Consumer Confidence Index (Saskatchewan, Manitoba, Alberta)



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 By Region

Source: Environics Analytics, VisitorView
VisitorView uses privacy-compliant, anonymous mobile location data, administrative datasets and analytics to identify Canadian travel patterns.

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

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 room rates and occupancy. Figures represent a sample of hotel rooms in the province and should be used as an indicator only. Republication or re-use of this data without the express written permission of STR is strictly prohibited.

Saskatchewan 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 U.S. land ports in automobiles licensed in the United States during the reporting period. Data exclude travellers who cross the border using a NEXUS card.

Tourism-Related Employment

Source: Labour Force Survey estimates, 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.

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. In addition to identifying that restaurants and dining out are an important part of the tourism industry, restaurant receipts can 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.

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

Consumer Confidence Index

Source: Conference Board of Canada, Monthly Consumer Confidence Index for 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:

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