

Saskatchewan Tourism Trends Report

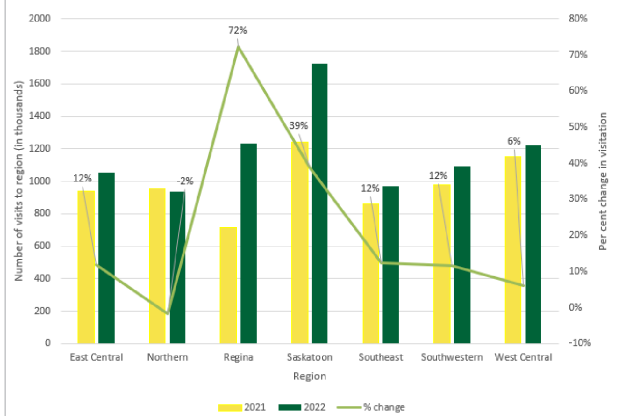
January to September 2022

Saskatchewan's tourism sector is experiencing a strong but extended recovery from the fallout of COVID-19. After slow growth in 2021, domestic visitation to Regina and Saskatoon increased by 72 per cent and 39 per cent, respectively. This upward trend is driven by growing comfort in travel to major cities and the return of festivals and events. Hotel occupancies across the province surpassed pre-pandemic levels throughout the summer months.

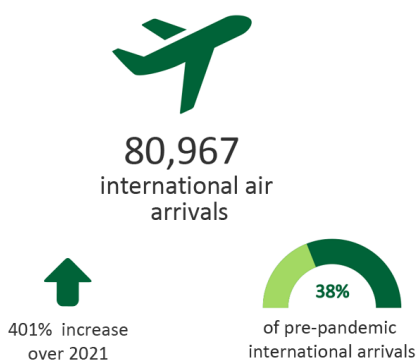
Overseas visitation has increased significantly since 2021, but remains far below pre-pandemic levels. Restoring overseas markets is hindered by economic recession in Europe, travel restrictions in China, and weak travel sentiment in other parts of Asia. Destination Canada predicts full recovery of overseas visits to Canada to occur in 2026.

Vehicle traffic from the U.S. is increasing at a slow but steady pace. Recent data from Destination Canada suggests that persistently high inflation could continue to slow recovery in the short-term, though the U.S. market is poised to accelerate in 2023 and be fully restored by 2024.

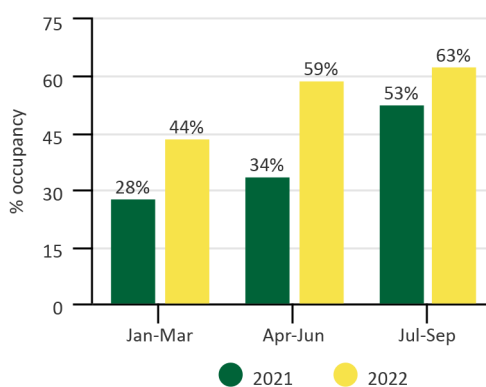
Change in Domestic Overnight Visits by Region January - September 2022 versus 2021



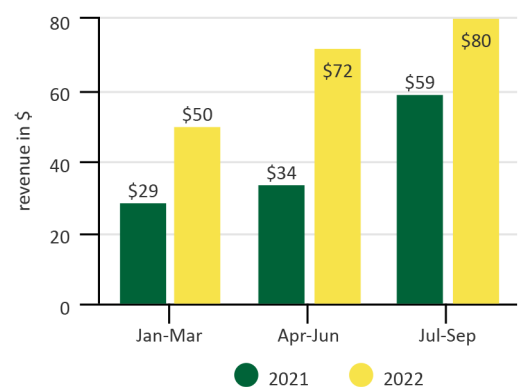
International Air Arrivals (based on ticket sales)



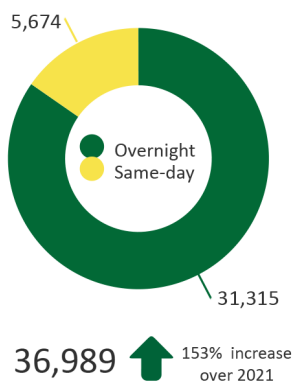
Average Occupancy at Select Fixed Roof Accommodations



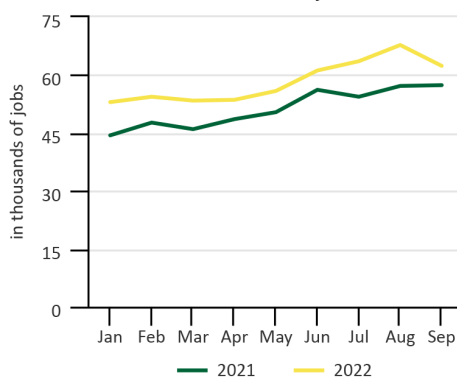
Hotel Revenue Per Available Room (RevPAR)



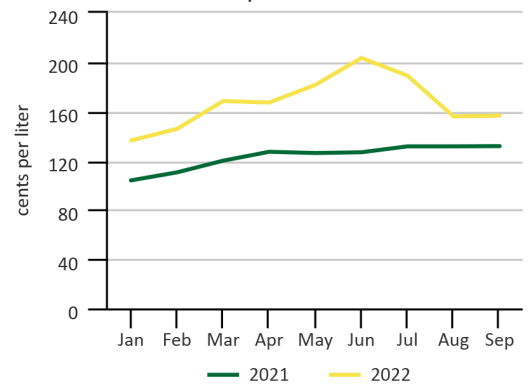
Saskatchewan Border Crossings in U.S.-licensed Automobiles



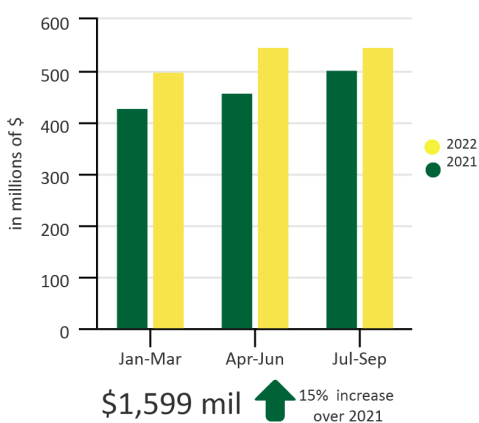
Tourism-Related Employment (in thousands of jobs)



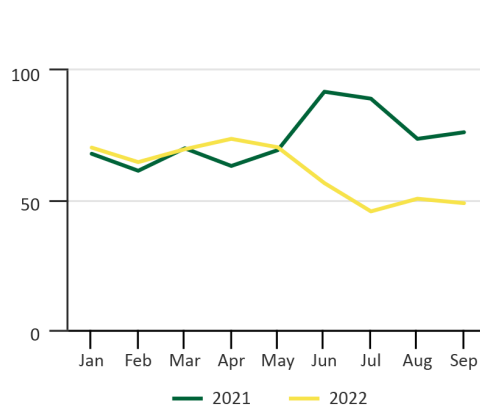
Average Retail Prices for Gasoline (cents per litre)



Restaurant Receipts (in millions of dollars)

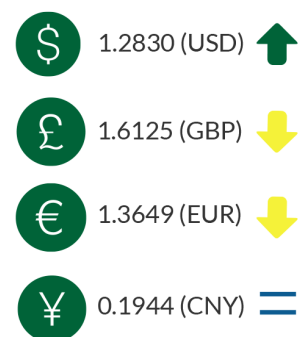


Consumer Confidence Index (Saskatchewan, Manitoba, Alberta)



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 strategy. 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. 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 re-entries 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.

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