

Alberta Tourism Market Monitor

Monthly
Update



February 2011

Accommodation Indices

For 2010 (annual), the occupancy rate for Alberta (excluding resorts) was 58.3%, down -0.6 points compared to the 2009 (58.9%). The average daily room rate for Alberta (excluding resorts) for 2010 (annual) was \$125.30, down -2.7% compared to 2009 (\$128.77).

	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.	Y-T-D Total
Edmonton Occupancy Rate	50.6%	59.0%	65.9%	64.8%	60.5%	62.2%	62.7%	66.1%	65.3%	62.9%	71.5%	47.8%	61.5%
Point Change from 2009	-6.2	-12.0	-2.7	-4.8	-4.5	-3.6	-2.7	-1.5	-1.8	-5.8	9.4	-1.2	-3.2
Average Daily Room Rate	\$120.37	\$119.92	\$119.37	\$120.66	\$121.21	\$120.56	\$114.29	\$114.57	\$120.55	\$119.85	\$128.99	\$115.58	\$119.78
Variance from 2009	-1.4%	-2.2%	-2.3%	-1.8%	-1.2%	0.7%	-1.6%	-0.1%	1.1%	-1.9%	6.2%	-1.5%	-0.5%
Calgary Occupancy Rate	51.4%	56.8%	62.0%	64.0%	64.8%	71.9%	74.5%	68.2%	76.5%	66.6%	64.8%	48.1%	63.9%
Point Change from 2009	-3.2	-6.7	-2.9	2.7	-0.4	3.5	-1.1	-3.4	-1.0	2.5	-0.5	0.2	-1.1
Average Daily Room Rate	\$134.03	\$138.67	\$137.87	\$139.29	\$144.96	\$161.50	\$159.61	\$132.52	\$143.35	\$142.52	\$143.13	\$130.23	\$143.27
Variance from 2009	-5.4%	-3.1%	-3.3%	-0.3%	1.6%	9.6%	-0.5%	-2.7%	-4.8%	-1.1%	-3.2%	0.0%	-0.8%
Alberta Resorts Occupancy Rate	35.6%	45.1%	46.7%	45.3%	52.8%	66.6%	75.3%	75.5%	68.5%	44.9%	33.6%	41.4%	52.8%
Point Change from 2009	-4.3	-7.0	0.3	2.3	-1.7	8.3	3.0	-2.2	0.5	-2.5	-2.3	-0.7	-0.6
Average Daily Room Rate	\$150.56	\$156.68	\$157.57	\$150.24	\$168.33	\$219.80	\$229.65	\$233.39	\$213.12	\$167.19	\$141.55	\$193.74	\$190.53
Variance from 2009	-3.9%	-2.4%	-2.6%	1.8%	-8.8%	-3.2%	2.9%	-2.0%	0.4%	1.7%	2.4%	2.7%	-0.5%
Other Alberta* Occupancy Rate	42.4%	48.6%	52.2%	45.4%	47.0%	56.0%	58.2%	56.6%	57.3%	55.9%	57.2%	42.5%	51.7%
Point Change from 2009	-7.8	-4.5	-0.2	0.1	-1.3	3.9	5.8	3.5	4.0	6.3	7.3	6.8	2.2
Average Daily Room Rate	\$114.94	\$114.29	\$116.50	\$113.28	\$111.52	\$114.72	\$114.20	\$112.58	\$114.54	\$112.31	\$112.69	\$109.55	\$113.35
Variance from 2009	-9.7%	-9.5%	-6.4%	-6.4%	-7.7%	-3.8%	-5.5%	-6.6%	-3.4%	-3.7%	-3.7%	-3.9%	-6.0%
Total Alberta (excluding Resorts) Occupancy Rate	47.6%	54.2%	59.3%	56.9%	56.6%	62.7%	64.4%	62.9%	65.4%	61.2%	63.8%	45.8%	58.3%
Point Change from 2009	-6.0	-7.7	-2.0	-0.8	-2.1	1.3	0.8	-0.3	0.4	1.5	5.4	2.4	-0.6
Average Daily Room Rate	\$123.02	\$123.83	\$124.20	\$124.61	\$126.50	\$132.72	\$129.96	\$119.72	\$126.38	\$124.48	\$127.47	\$117.96	\$125.30
Variance from 2009	-5.4%	-5.1%	-4.3%	-2.6%	-2.0%	2.6%	-3.2%	-3.6%	-3.4%	-2.5%	-1.2%	-2.3%	-2.7%

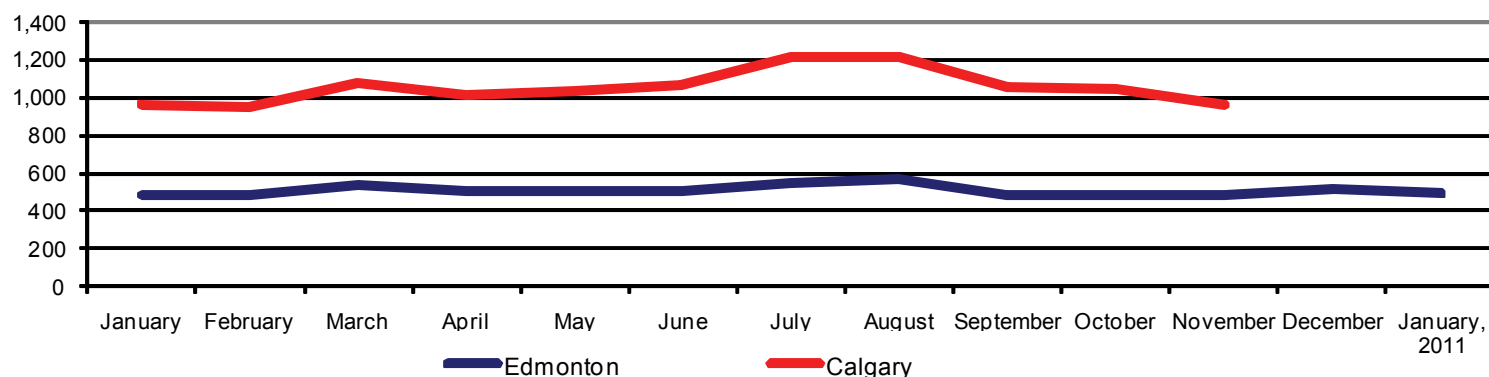
* Includes Lethbridge, Red Deer and other Alberta communities.

Source: PKF Consulting Inc.

Air Passengers (enplanements and deplanements)

Edmonton International Airport reported that in January 2011, 489,947 passengers either boarded or deplaned at the airport, a +0.7% increase compared to January 2010 (486,471).

Air Passengers ('000s of enplanements and deplanements) 2010 and 2011



Source: Edmonton International Airport and Calgary Airport Authority. No new data for Calgary International Airport in February.

Highway Traffic Count ('000s of Vehicles) 2010

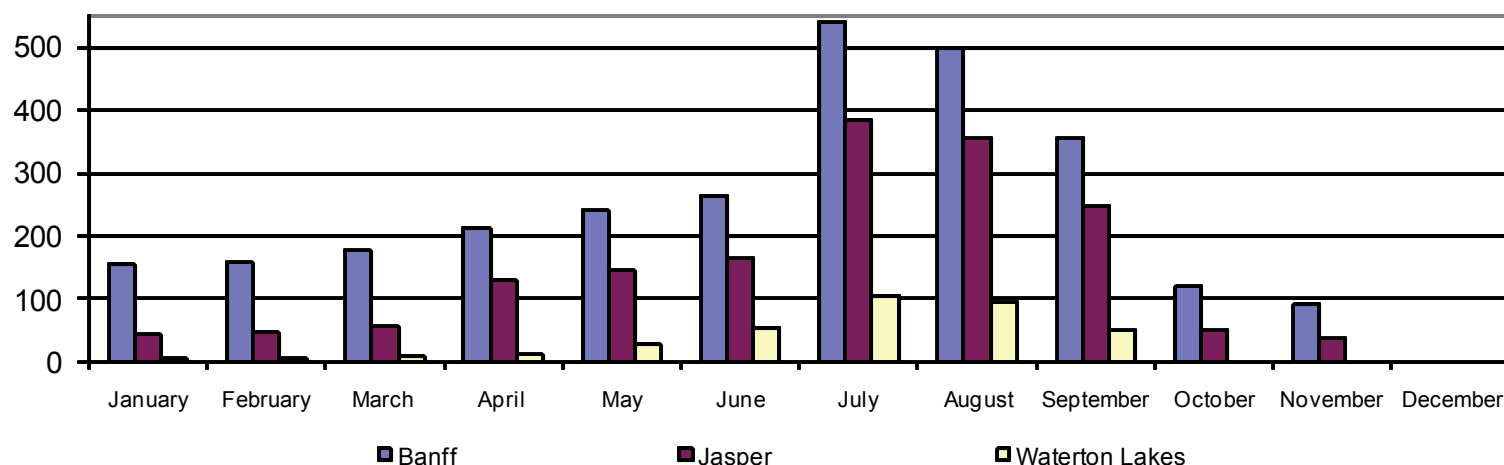
<i>Preliminary</i>	Hwy 1—Sask border w-bound	% Change from 2009	Hwy 1—Banff Pk Gate (2 way)	% Change from 2009	Hwy 16— Jasper Pk Gate (2 way)	% Change from 2009	Hwy 16—Jct #897 w-bound	% Change from 2009
January	55.0	5.0%	420.7	4.7%	81.8	4.1%	142.4	2.7%
February	55.3	5.5%	414.4	0.6%	82.6	7.0%	133.3	2.2%
March	62.7	7.7%	462.3	8.3%	101.5	14.4%	154.8	9.0%
April	70.5	4.1%	472.7	1.7%	109.4	8.1%	161.9	1.3%
May	73.6	2.2%	527.8	-2.9%	122.1	3.2%	170.7	3.8%
June	77.0	0.1%	547.9	0.6%	136.9	3.1%	175.9	4.6%
July	103.9	-1.5%	804.0	5.0%	217.1	6.3%	192.0	4.5%
August	104.4	1.0%	771.1	-2.4%	212.1	-1.8%	196.2	6.5%
September	79.0	1.5%	562.7	-3.9%	138.0	-1.1%	178.5	8.2%
October	77.8	3.3%	481.3	13.1%	108.8	12.4%	185.7	11.5%
November	62.8	-3.5%	358.5	-6.9%	81.8	3.9%	169.8	10.2%
December	70.2	5.2%	446.0	8.1%	95.2	7.9%	166.3	9.4%
Year-To-Date	892.2	2.1%	6,269.4	1.8%	1,487.3	4.7%	2,027.6	6.2%

Source: Alberta Transportation.

National Park Attendance ('000s of person visits)

Independent visits to Waterton Lakes National Park for 2010 (annual) are up +5.0% to 401,747, compared to 2009 (382,387).

Independent Visits to National Parks ('000s) - 2010



Source: Parks Canada. No new data for Banff National Park and Jasper National Park in February.

Historic Sites and Museums ('000s of person visits)

Visits to Alberta's historic sites and museums for 2010 (annual) decreased -3.5%, compared to 2009. This was for 15 historic sites throughout Alberta, 2 museums and one field station.

2010	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.	Y-T-D Total
Visitor Attendance	25.2	41.5	47.3	48.0	76.3	101.8	180.9	186.2	70.4	42.1	33.1	20.4	873.2
% Change from 2009	12.5%	-12.6%	1.3%	-6.1%	0.0%	-8.2%	-3.2%	-3.0%	-8.9%	5.0%	0.4%	-2.1%	-3.5%

Source: Alberta Culture and Community Spirit, Historic Resources Division.

Employment 2011 ('000s of persons)

Employment in the Accommodation, Food and Beverage sector in Alberta decreased -7.3% in January 2011, compared to January 2010.

Preliminary Seasonally Adjusted	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.	Average Y-T-D Total
Accommodation, Food and Beverage	123.1												123.1
% Change from 2010	-7.8%												-7.8%

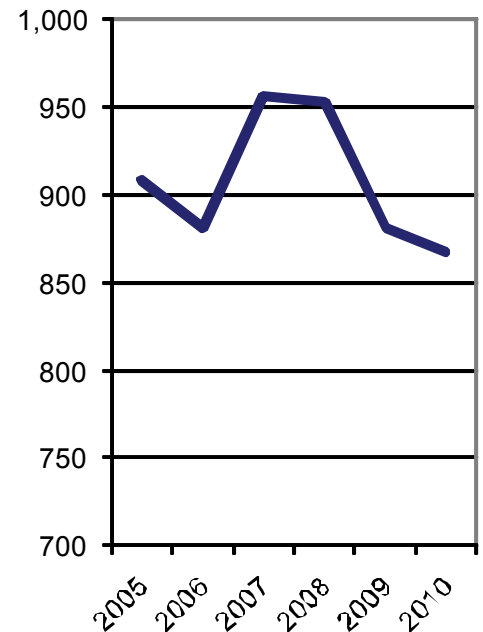
Source: Statistics Canada, Labour Force Survey.

Direct international entries into Alberta and Canada (Preliminary) - 2010 (Annual)

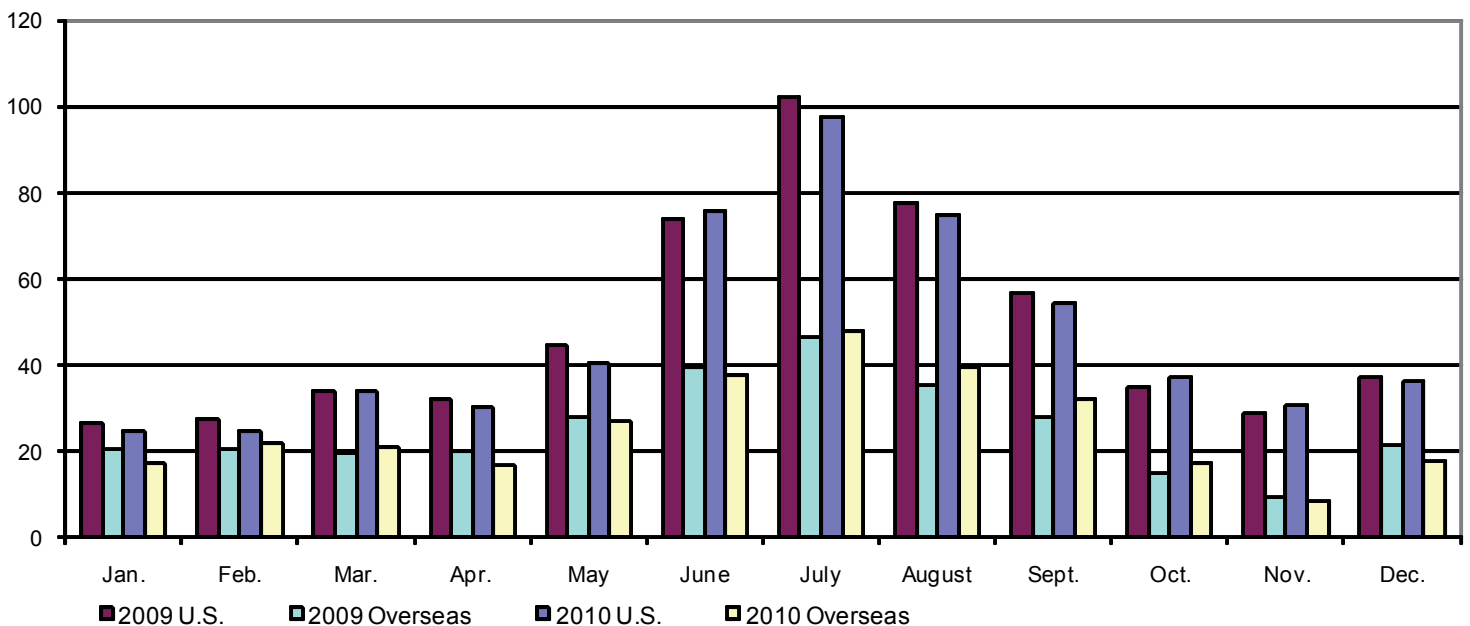
Alberta direct entries include all residents of the United States and overseas countries that enter Canada at a Canada Border Services Agency land port or airport in Alberta and stay at least one night in the province. The direct entry data do not include visitors that enter Alberta indirectly (i.e. enter Canada via another province and then travel into Alberta).

- For 2010 (annual), Alberta's overnight direct entries by international visitors (U.S. and overseas) decreased -1.6%, compared to 2009. For Canada as a whole, the increase was +2.3%.
- Overnight total (auto and non-auto) direct entries for 2010 (annual) from the U.S. to Alberta decreased -2.5%, compared to 2009. Nationally, the increase was +0.7%.
- For 2010 (annual), overnight direct entries by overseas visitors into Alberta increased +0.2%, compared to 2009. Nationally, the increase was +6.8%.
- For 2010 (annual), overnight visitors from the United Kingdom to Canada increased +0.2% compared to 2009. Overnight visitors from Germany increased +7.2%, visitors from Mexico decreased -28.6% and Japanese visitors increased +19.1%.

Direct Overnight International (Overseas and U.S.) Entries into Alberta, January - December ('000s)



Direct Overnight U.S. and Overseas Entries into Alberta ('000s)



Source: Statistics Canada, International Travel: Advance Information

Food Services and Drinking Places (\$millions)

According to results from Statistics Canada's Food Services and Drinking Places survey, Alberta's total receipts for the month of November 2010 were up +5.5% to \$569.1 million, compared to November 2009 (\$539.2 million).

<i>Preliminary</i>	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.	Average Y-T-D Total
Total Receipts for Alberta	\$551.3	\$547.7	\$569.0	\$558.7	\$569.3	\$569.6	\$558.2	\$559.8	\$567.5	\$580.0	\$569.1		\$562.7
% Change from 2009	0.2%	-1.0%	4.1%	2.1%	2.6%	2.6%	0.1%	3.3%	4.2%	8.0%	5.5%		2.6%

Source: Statistics Canada, Food Services and Drinking Places

Definitions of Indicators

Direct International Entries into Canada and Alberta - Alberta direct entries include all residents of the United States and overseas countries that enter Canada at a Canada Border Services Agency land port or airport in Alberta and stay at least one night in the province. The direct entry data do not include visitors that enter Alberta indirectly (i.e. enter Canada via another province and then travel into Alberta). Source: Statistics Canada, Preliminary Advance Information, International Travel, catalogue 66-001-P.

Air Passengers - Data are preliminary estimates of the number of air passengers enplaning and deplaning. Source: Calgary Airport Authority and Edmonton International Airport (websites).

Highway Traffic - These data 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).

Accommodation Indices— Occupancy rates and average daily room rates are based on a sample of hotels for each respective location. Source: PKF Consulting Inc., Trends in the Canadian Hotel Industry.

Historic Sites and Museums— Visitor attendance figures are monthly totals based on fifteen historic sites, the Royal Alberta Museum, the Royal Tyrrell Museum of Paleontology, and the Tyrrell Field Station. Source: Alberta Culture and Community Spirit, Historic Resources Division.

National Park Attendance— Attendance is reported as the number of independent visits to National Parks in Alberta. Data are preliminary unless otherwise noted. Tour group data are included in the annual total only. Source: Parks Canada.

Employment in the Food and Accommodation Sector— The employment figure represents all persons 15 years or older who worked for pay or profit or unpaid work in the food services and accommodation sectors, including businesses or other ventures owned or operated by a related family member(s) during the reference period of the survey. Source: Statistics Canada, Labour Force Survey.

Food Services and Drinking Places— The monthly survey 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 includes full-service restaurants, limited service eating places, special food places and drinking places. Source: Statistics Canada, Food Services and Drinking Places, CANSIM table: 355-0006.

Produced by: Tourism Business Development, Research and Investment Branch
(780) 415-1224 kristy.hubscher@gov.ab.ca