

Alberta Tourism Market Monitor

Monthly Update

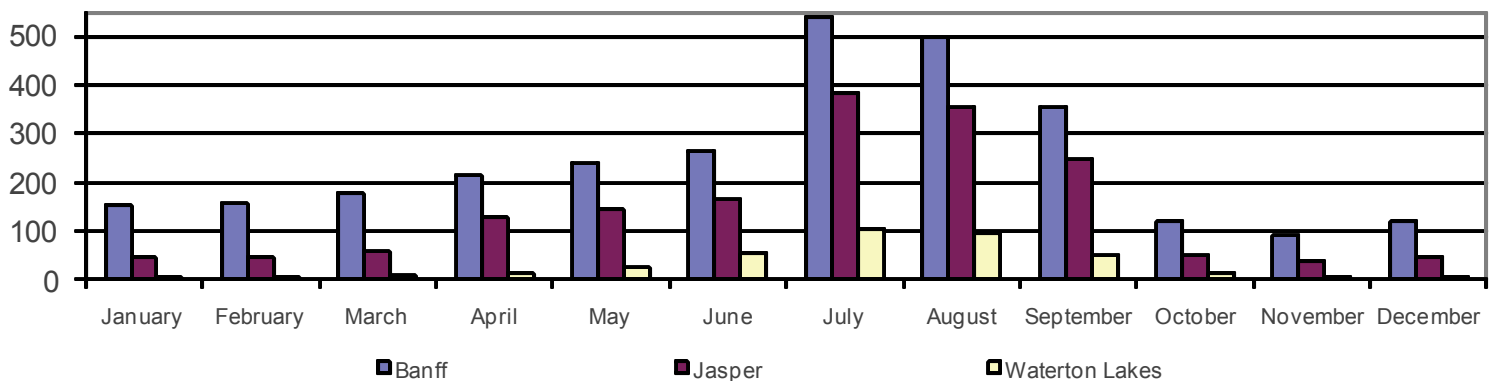


March 2011

National Park Attendance ('000s of person visits) Group Tours not included

In 2010, independent visits to Banff National Park were 2.94 million, an increase of +1.0% compared to 2009 (2.91 million). In 2010, independent visits to Jasper National Park were 1.71 million, an increase of +2.0% compared to 2009 (1.68 million). Group tour visitors are not included in these counts.

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

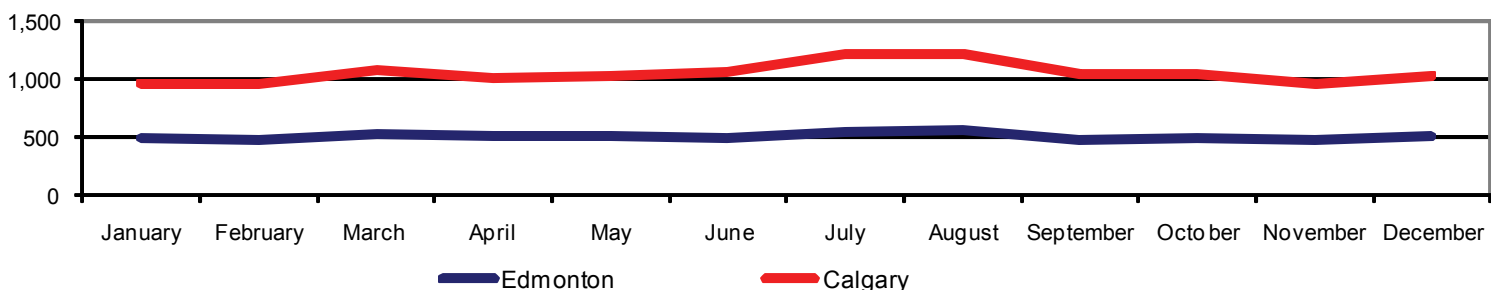


Source: Parks Canada. **No new data for Waterton Lakes National Park in March.**

Air Passengers (enplanements and deplanements)

Calgary International Airport reported that in 2010 (annual), 12.63 million passengers either boarded or deplaned at the airport, a +3.7% increase compared to 2009 (12.18 million). Edmonton International Airport reported that in 2010 (annual), 6.09 million passengers either boarded or deplaned at the airport, which was no change compared to 2009.

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



Source: Edmonton International Airport and Calgary Airport Authority.

Accommodation Indices

	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.

January and February 2011 data will be available for April's edition of the Market Monitor.

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

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. **No new data in March.**

Employment 2011('000s of persons)

Employment in the Accommodation, Food and Beverage sector in Alberta decreased -3.4% in February 2011, compared to February 2010.

<i>Preliminary Seasonally Adjusted</i>	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.	Average Y-T-D Total
Accommodation, Food and Beverage	123.1	126.2											124.7
% Change from 2010	-7.8%	-3.4%											-5.6%

Source: Statistics Canada, Labour Force Survey.

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%

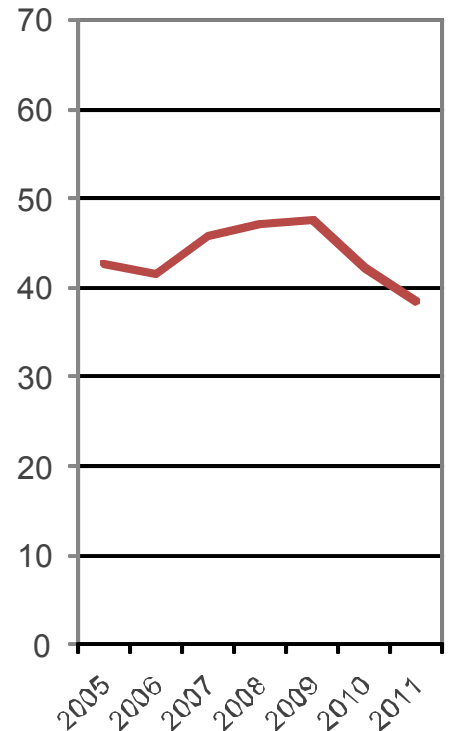
Source: Alberta Transportation. **No new data in March.**

Direct international entries into Alberta and Canada (Preliminary) - January 2011

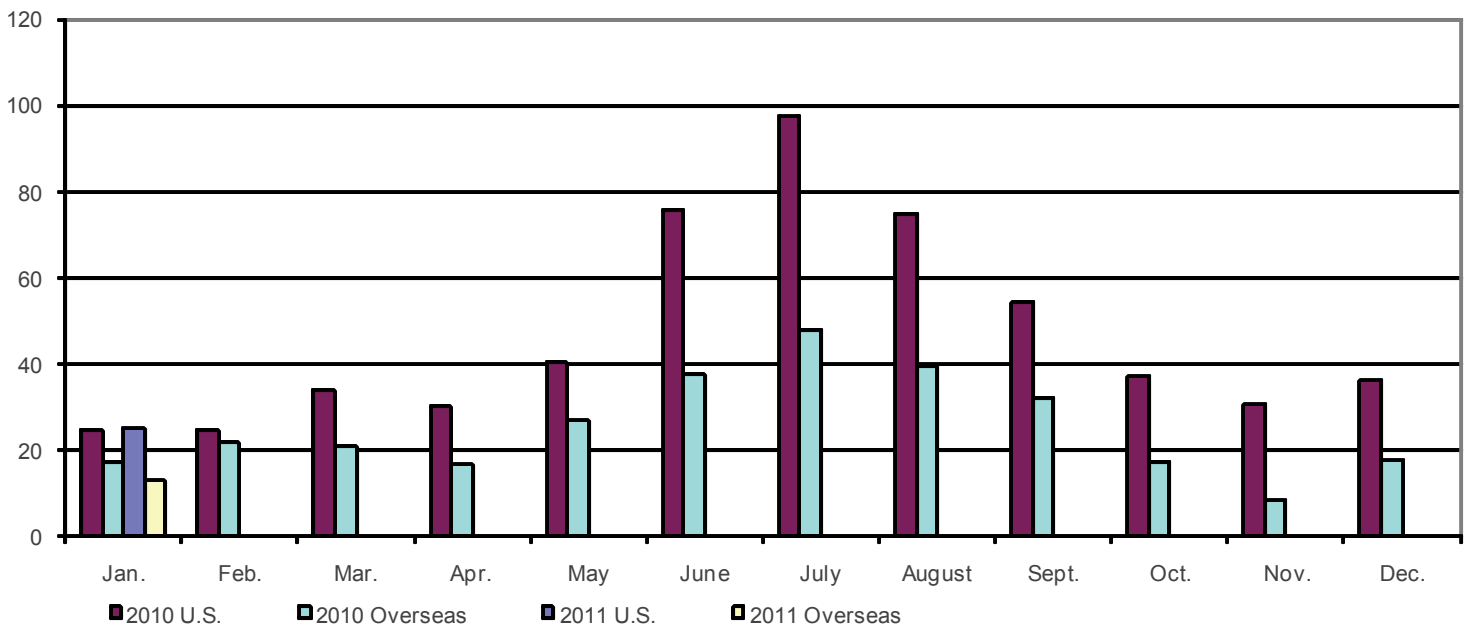
Alberta direct entries include all residents of the United States and overseas countries that enter Canada at a Canada Border Services Agency land port or airport in Alberta and stay at least one night in the province. The direct entry data do not include visitors that enter Alberta indirectly (i.e.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

- For January 2011, Alberta's overnight direct entries by international visitors (U.S. and overseas) decreased -8.9%, compared to January 2010. For Canada as a whole, the increase was +2.4%.
- Overnight total (auto and non-auto) direct entries for January 2011 from the U.S. to Alberta increased +2.2%, compared to January 2010. Nationally, the increase was +1.4%.
- For January 2011, overnight direct entries by overseas visitors into Alberta decreased -24.5%, compared to January 2010. Nationally, the increase was +4.7%.
- For January 2011, overnight visitors from the United Kingdom to Canada decreased -9.2% compared to January 2010. Overnight visitors from Germany decreased -9.0%, visitors from Mexico increased +2.3% and Japanese visitors decreased -10.2%.

Direct Overnight International (Overseas and U.S.) Entries into Alberta, January ('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 average total receipts for 2010 were up +3.2% to \$564.6 million, compared to 2009 (\$547.2 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	\$569.2	\$577.8	\$573.9	\$580.2	\$564.6
% Change from 2009	0.2%	-1.0%	4.1%	2.1%	2.6%	2.6%	0.1%	3.3%	4.5%	7.6%	6.4%	8.8%	3.2%

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