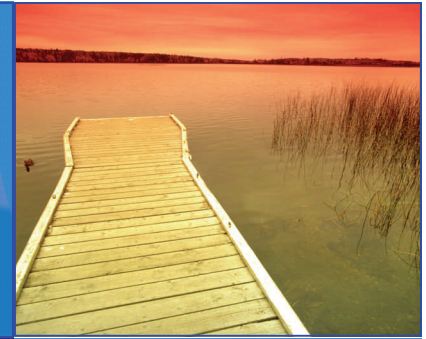


Alberta Tourism Market Monitor

Monthly
Update



September 2011

For the first seven months of 2011, the occupancy rate for Alberta (excluding resorts) was 61.2%, up +3.9 points compared to the first seven months of 2010 (57.3%). The average daily room rate for Alberta (excluding resorts) for the first seven months of 2011 was \$126.71, up +0.1% compared to the same time period in 2010 (\$126.63).

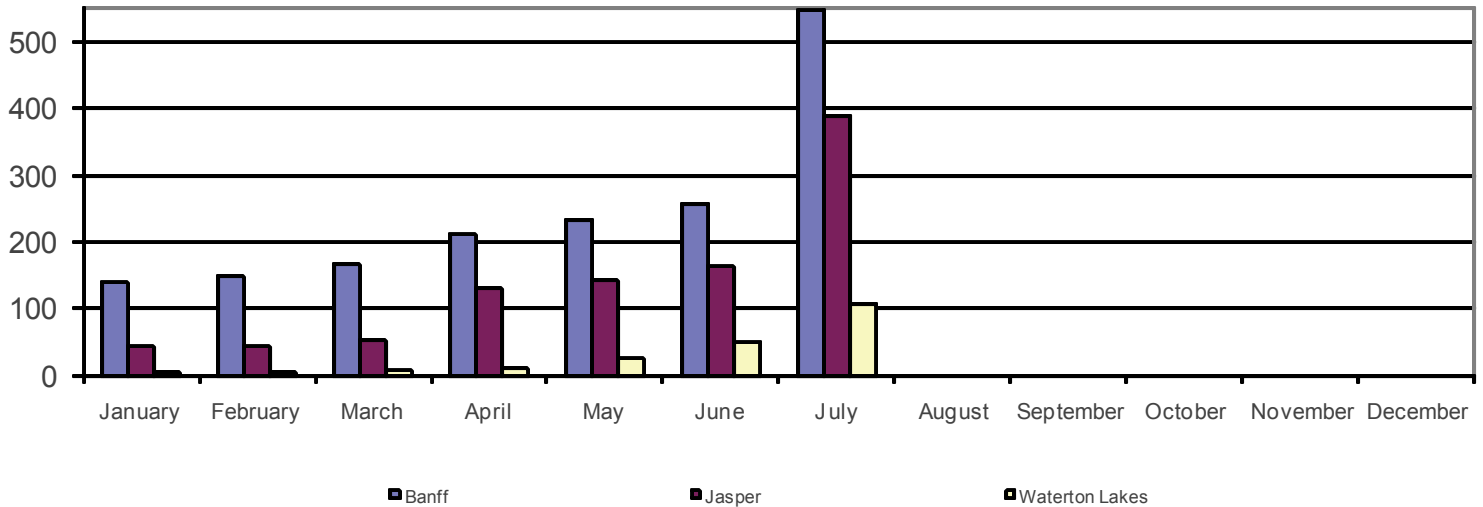
| | Jan. | Feb. | Mar. | Apr. | May | June | July | Aug. | Sept. | Oct. | Nov. | Dec. | Y-T-D Total |
|---|----------|----------|----------|----------|----------|----------|-----------------|------|-------|------|------|------|-----------------|
| Edmonton Occupancy Rate | 48.1% | 62.7% | 66.1% | 66.3% | 65.1% | 64.0% | 62.7% | | | | | | 62.3% |
| Point Change from 2010 | -2.4 | 3.8 | 0.2 | 1.5 | 4.3 | 1.6 | -0.1 | | | | | | 1.4 |
| Average Daily Room Rate | \$117.46 | \$120.14 | \$121.47 | \$119.73 | \$119.11 | \$121.17 | \$113.58 | | | | | | \$118.89 |
| Variance from 2010 | -2.7% | -0.2% | 2.9% | -0.6% | -0.6% | 0.9% | -0.5% | | | | | | -0.3% |
| Calgary Occupancy Rate | 50.5% | 62.5% | 67.4% | 63.7% | 68.0% | 75.2% | 78.3% | | | | | | 66.7% |
| Point Change from 2010 | -0.9 | 6.5 | 6.1 | 0.3 | 3.1 | 3.7 | 4.0 | | | | | | 3.9 |
| Average Daily Room Rate | \$137.48 | \$141.35 | \$149.64 | \$141.37 | \$145.05 | \$152.22 | \$161.76 | | | | | | \$148.03 |
| Variance from 2010 | 2.5% | 1.9% | 8.5% | 1.1% | 0.1% | -5.7% | 1.6% | | | | | | 1.1% |
| Alberta Resorts Occupancy Rate | 32.4% | 43.3% | 42.3% | 44.6% | 51.9% | 68.4% | 83.0% | | | | | | 51.8% |
| Point Change from 2010 | -3.0 | -1.8 | -4.1 | 0.1 | -0.7 | 2.9 | 8.0 | | | | | | -0.4 |
| Average Daily Room Rate | \$150.95 | \$160.13 | \$149.86 | \$147.33 | \$169.35 | \$216.11 | \$223.98 | | | | | | \$181.37 |
| Variance from 2010 | 0.7% | -0.5% | -3.6% | -0.6% | 3.0% | 1.2% | -0.4% | | | | | | 0.4% |
| Other Alberta* Occupancy Rate | 50.5% | 56.7% | 59.8% | 49.6% | 54.1% | 60.1% | 63.4% | | | | | | 56.3% |
| Point Change from 2010 | 8.3 | 8.5 | 7.9 | 4.5 | 7.2 | 4.0 | 5.1 | | | | | | 6.4 |
| Average Daily Room Rate | \$112.27 | \$112.49 | \$114.77 | \$113.43 | \$115.95 | \$115.75 | \$115.61 | | | | | | \$114.40 |
| Variance from 2010 | -2.5% | -1.6% | -1.0% | 0.1% | 2.5% | 1.3% | 1.3% | | | | | | 0.1% |
| Total Alberta (excluding Resorts) Occupancy Rate | 49.8% | 60.2% | 64.0% | 58.9% | 61.5% | 65.8% | 67.6% | | | | | | 61.2% |
| Point Change from 2010 | 2.3 | 6.4 | 5.0 | 2.3 | 4.9 | 3.1 | 3.1 | | | | | | 3.9 |
| Average Daily Room Rate | \$121.40 | \$123.71 | \$127.78 | \$124.61 | \$126.65 | \$129.84 | \$131.09 | | | | | | \$126.71 |
| Variance from 2010 | -1.5% | -0.2% | 2.9% | -0.1% | 0.2% | -1.9% | 1.0% | | | | | | 0.1% |

* Includes Lethbridge, Red Deer and other Alberta communities.

Source: PKF Consulting Inc.

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

Independent Visits to National Parks ('000s) - 2011

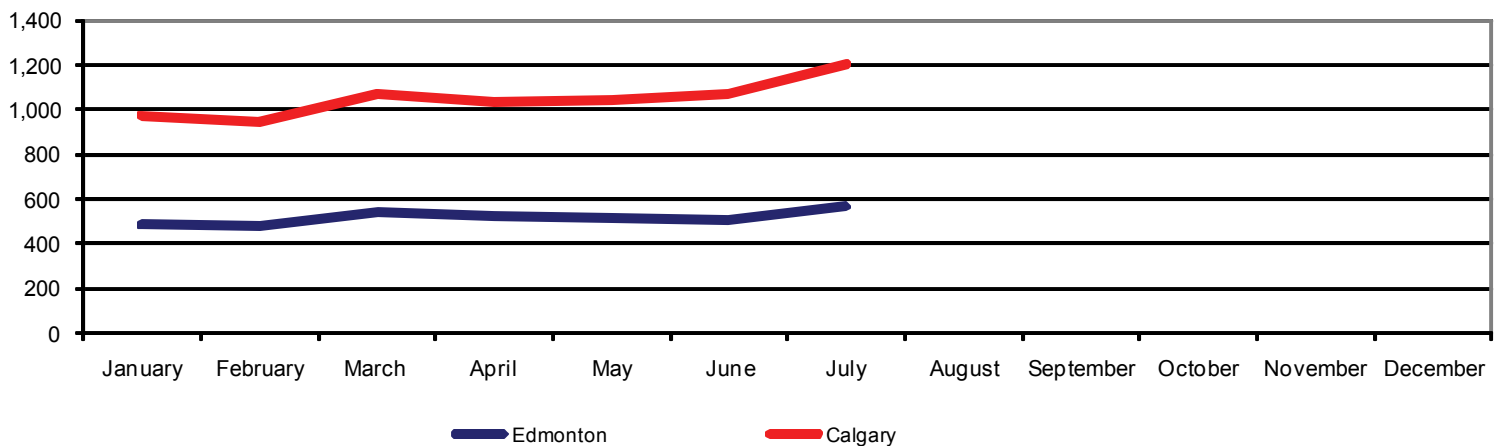


Source: Parks Canada. No new data in September.

Air Passengers (enplanements and deplanements)

Calgary International Airport reported that in July 2011, 1,208,890 passengers either boarded or deplaned at the airport, a -0.9% decrease compared to July 2010 (1,219,330). For year-to-date 2011, 7.34 million passengers either boarded or deplaned at the airport, a +0.4% increase compared to the same time period in 2010. Edmonton International Airport reported that in July 2011, 583,661 passengers either boarded or deplaned at the airport, a +4.0% increase compared to July 2010 (565,230). For year-to-date 2011, 4.21 million passengers either boarded or deplaned at the airport, a +2.1% increase compared to the same time period in 2010.

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



Source: Edmonton International Airport and Calgary Airport Authority.

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

| 2011 | Jan. | Feb. | Mar. | Apr. | May | June | July | Aug. | Sept. | Oct. | Nov. | Dec. | Y-T-D Total |
|--------------------|--------|--------|--------|--------|--------|-------|-------|---------------|-------|------|------|------|---------------|
| Visitor Attendance | 18.5 | 35.2 | 36.2 | 41.5 | 65.7 | 93.4 | 175.3 | 152.0 | | | | | 618.7 |
| % Change from 2010 | -26.5% | -15.2% | -23.4% | -13.6% | -14.0% | -8.3% | -3.1% | -18.4% | | | | | -12.5% |

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

Employment 2011 ('000s of persons)

Employment in the Accommodation, Food and Beverage sector in Alberta increased +8.4% in August 2011, compared to August 2010. Average year-to-date employment in the Accommodation, Food and Beverage sector in Alberta is up +3.7% compared to the same time period in 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 | 134.0 | 137.9 | 134.3 | 133.5 | 136.2 | 133.2 | | | | | 132.3 |
| % Change from 2010 | -7.8% | -3.4% | 0.9% | 7.5% | 5.6% | 8.2% | 10.6% | 8.4% | | | | | 3.7% |

Source: Statistics Canada, Labour Force Survey.

Highway Traffic Count ('000s of Vehicles) 2011

| <i>Preliminary</i> | Hwy 1—Sask border w-bound | % Change from 2010 | Hwy 1—Banff Pk Gate (2 way) | % Change from 2010 | Hwy 16—Jasper Pk Gate (2 way) | % Change from 2010 | Hwy 16—Jct #897 w-bound | % Change from 2010 |
|--------------------|---------------------------|--------------------|-----------------------------|--------------------|-------------------------------|--------------------|-------------------------|--------------------|
| January | 51.9 | -5.5% | 379.3 | -9.8% | 83.2 | 1.7% | 150.2 | 5.5% |
| February | 51.7 | -6.5% | 390.2 | -5.8% | 77.9 | -4.8% | 144.2 | 8.2% |
| March | 60.1 | -4.1% | 426.2 | -7.8% | 94.7 | -6.7% | 163.9 | 5.9% |
| April | 66.5 | -5.7% | 471.0 | -0.4% | 112.6 | 2.9% | 175.2 | 8.2% |
| May | 72.3 | -1.8% | 522.8 | -0.9% | 124.6 | 2.0% | 183.1 | 7.3% |
| June | | | | | | | | |
| July | | | | | | | | |
| August | | | | | | | | |
| September | | | | | | | | |
| October | | | | | | | | |
| November | | | | | | | | |
| December | | | | | | | | |
| Year-To-Date | 302.5 | -4.6% | 2,189.5 | -4.7% | 493.1 | -0.9% | 816.6 | 7.0% |

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

Food Services and Drinking Places (\$millions)

According to results from Statistics Canada's Food Services and Drinking Places survey, Alberta's total receipts for June 2011 were up +7.0% to \$601.8 million, compared to June 2010 (\$562.6 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 | \$580.7 | \$579.2 | \$589.3 | \$594.5 | \$597.6 | \$601.8 | | | | | | | \$590.5 |
| % Change from 2010 | 6.7% | 5.5% | 6.3% | 9.2% | 7.3% | 7.0% | | | | | | | 7.0% |

Source: Statistics Canada, Food Services and Drinking Places

Definitions of Indicators

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. Beginning in 2004, the monthly figures for Banff National Park and Jasper National Park reflected independent travellers only, and do not include people travelling as part of a tour group. The tour group data, however, are included in the annual total. 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