

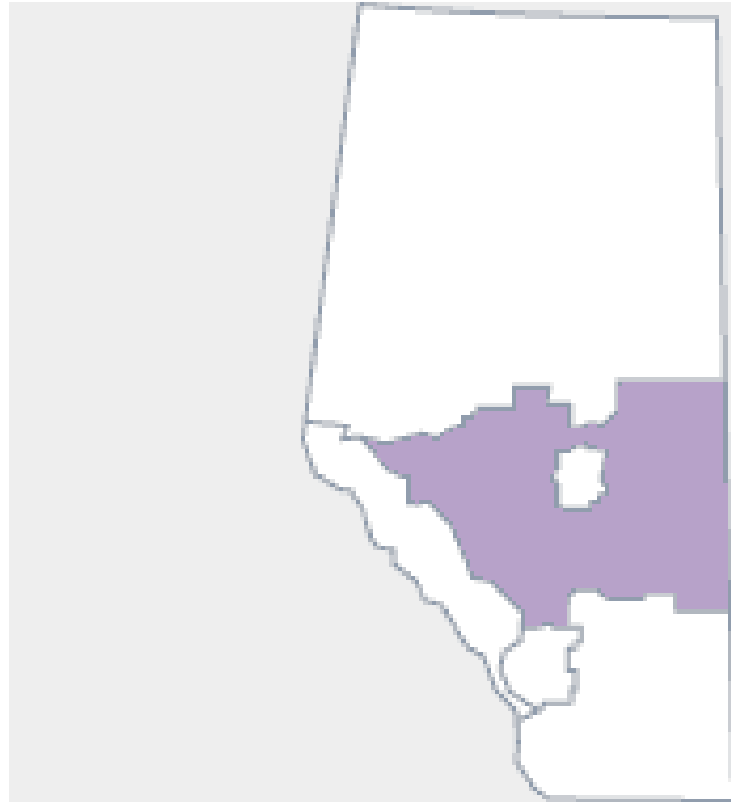


# Central Alberta TDR

Visitor Statistics 1998-2002

Pre-Summer Operator  
Survey 2004

Summer Travel Intentions  
2004



**...ALBERTA CENTRAL**



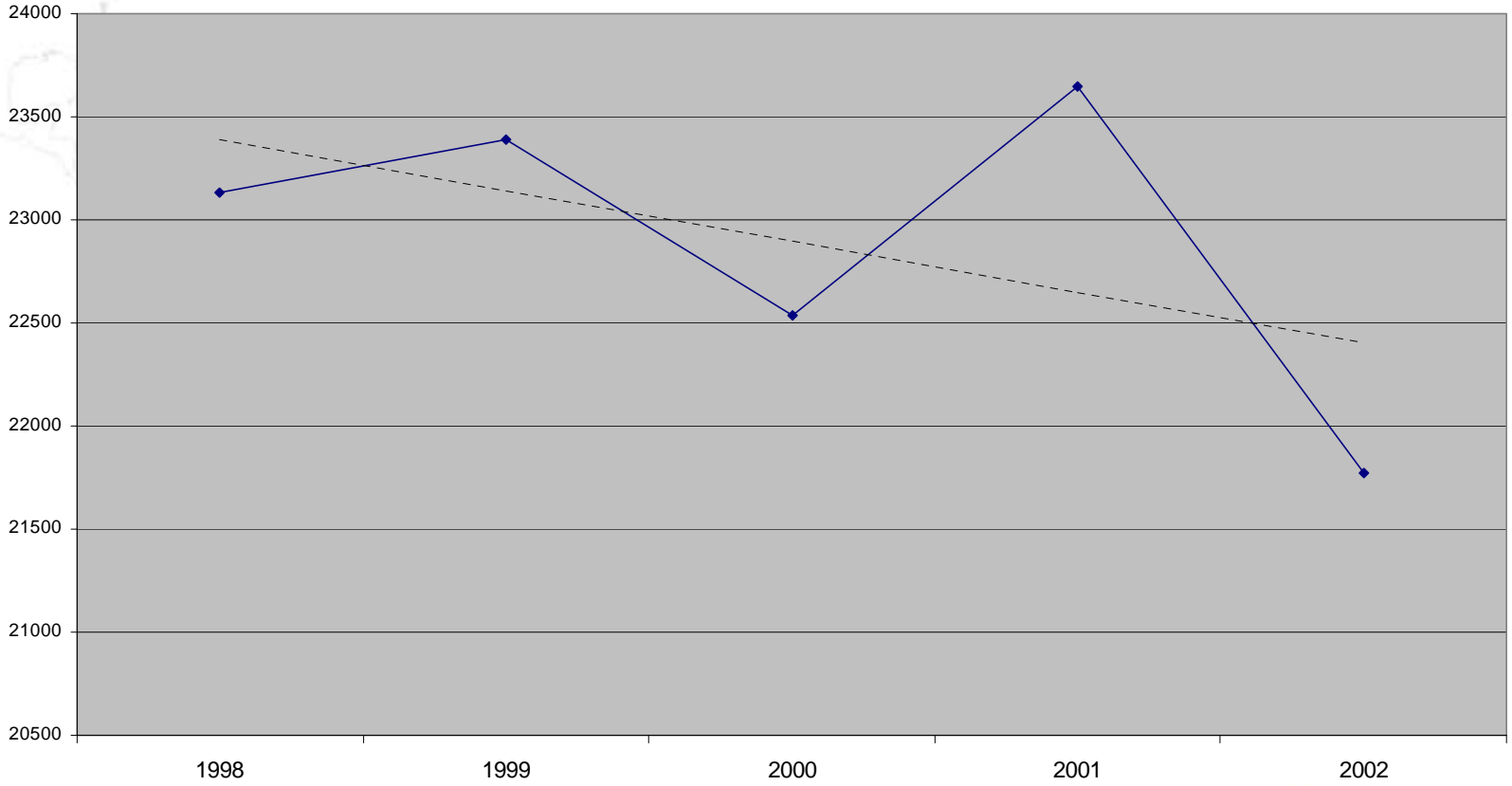
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- Summer Travel Intentions 2004
  - Summary of Alberta results
  - Summary of Central Alberta TDR results



# Total Visits to Alberta (000s)

Total visits to Alberta have been declining over the past five year as indicated by the trend line (dotted line).



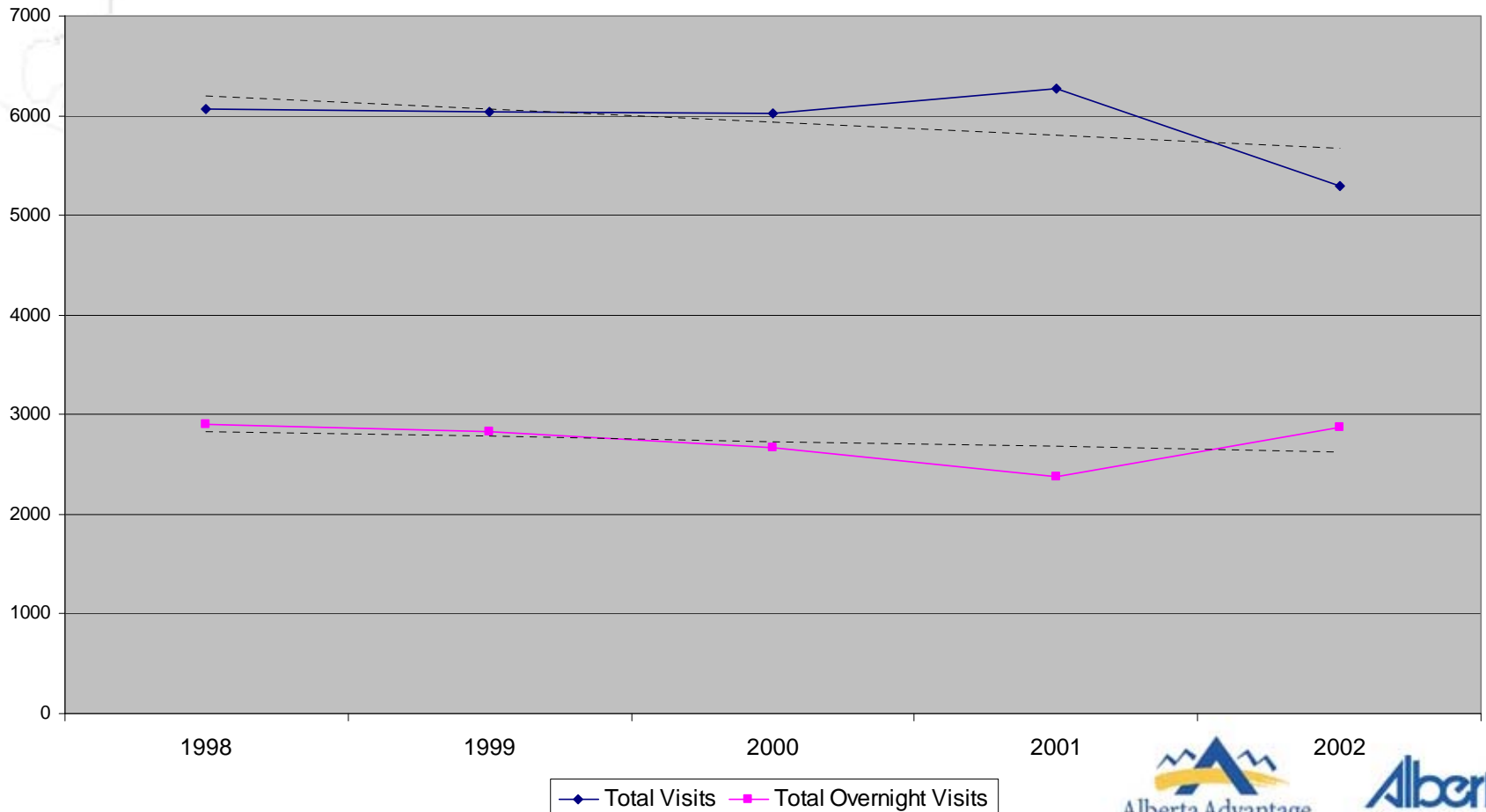
Person-visits are same-day and overnight for domestic visitors and overnight for international visitors.





# Visits to Central Alberta TDR

Total visits and overnight visits to Central Alberta TDR have been declining over the past five years as indicated by the trend line (dotted line). Numbers are in 000s.

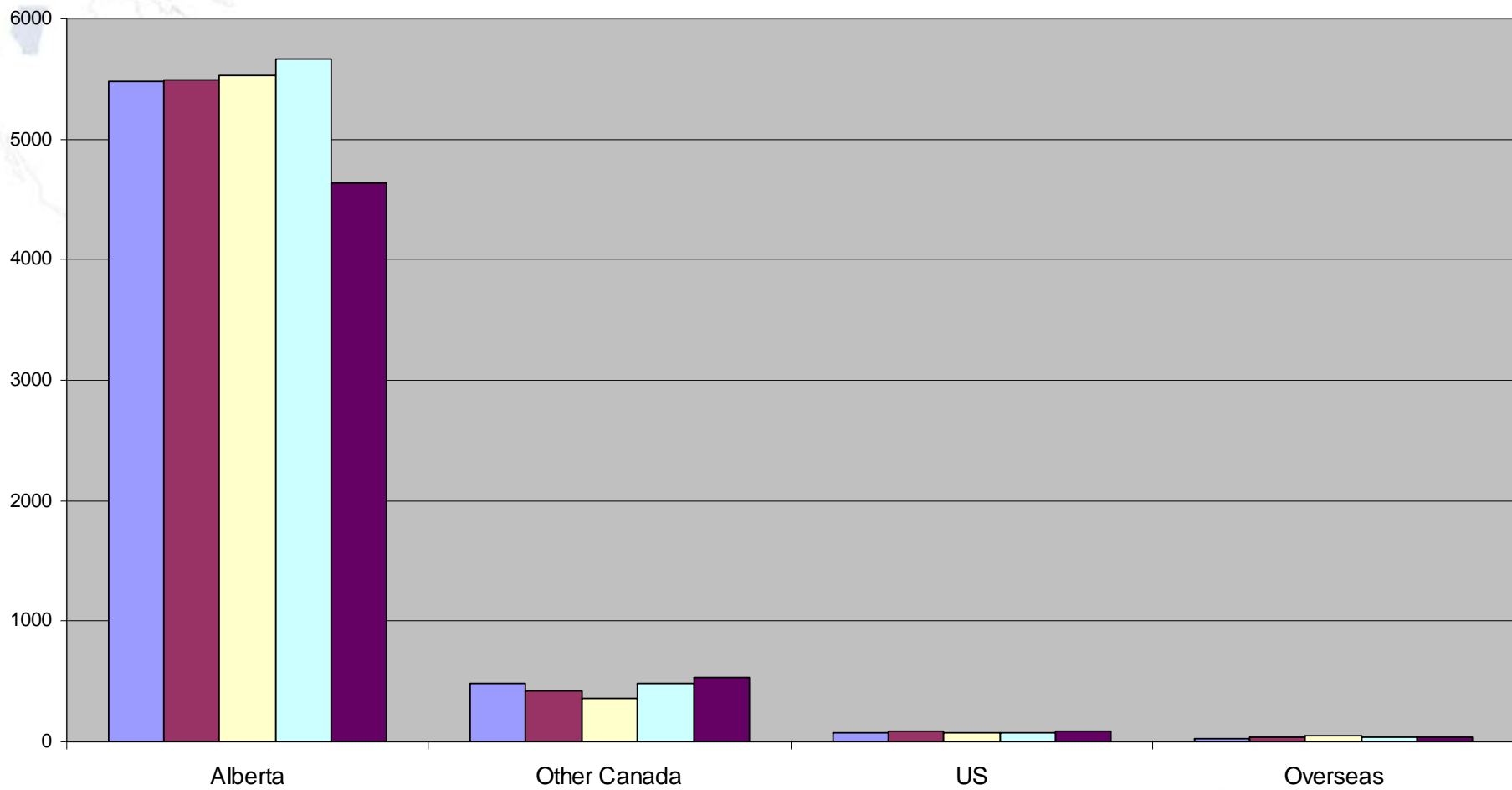


Person-visits are same-day and overnight for domestic visitors and overnight for international visitors.





# Total Visits (000s) to Central Alberta TDR by geo-region

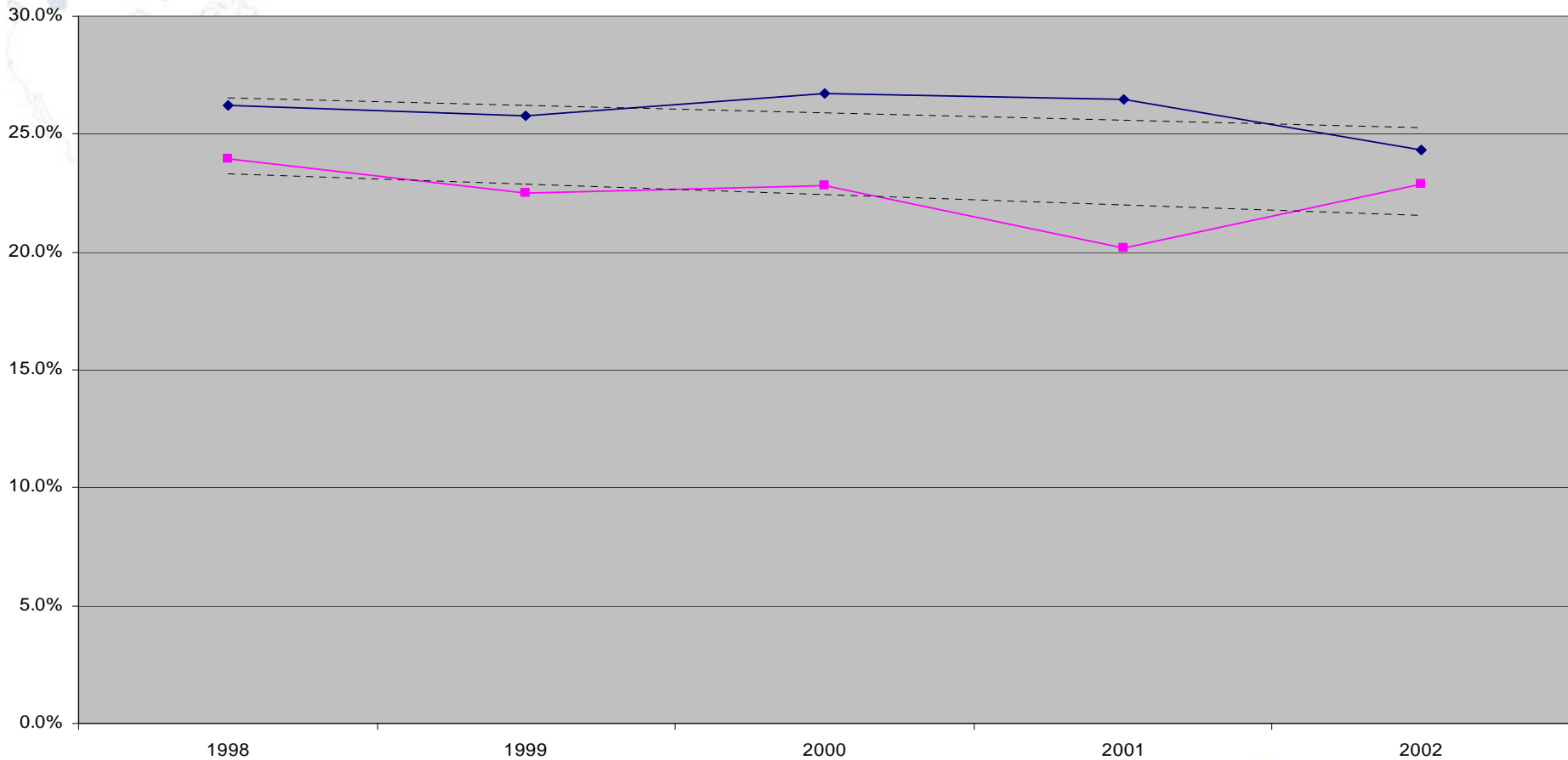


■ 1998 ■ 1999 ■ 2000 ■ 2001 ■ 2002

Person-visits are same-day and overnight for domestic visitors and overnight for international visitors.



# Visits to Central Alberta TDR All vs. Overnight as a % of all visits to and within Alberta



—◆— All Visits —■— Overnight

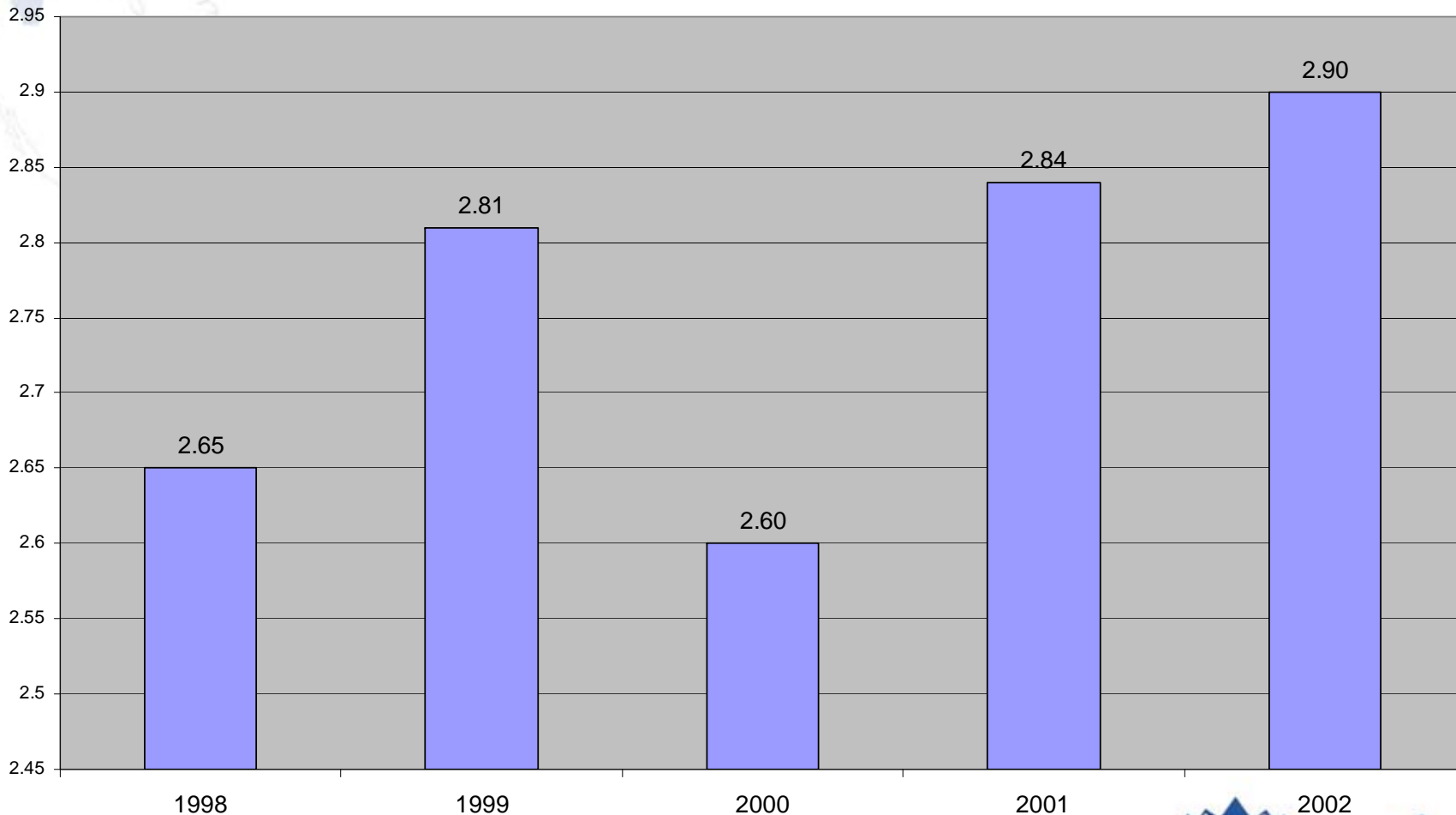
% of All visits to TDR/All visits to and within Alberta  
 % of Overnight visits to TDR/Overnight visits to and within Alberta

Person-visits are same-day and overnight for domestic visitors and overnight for international visitors.

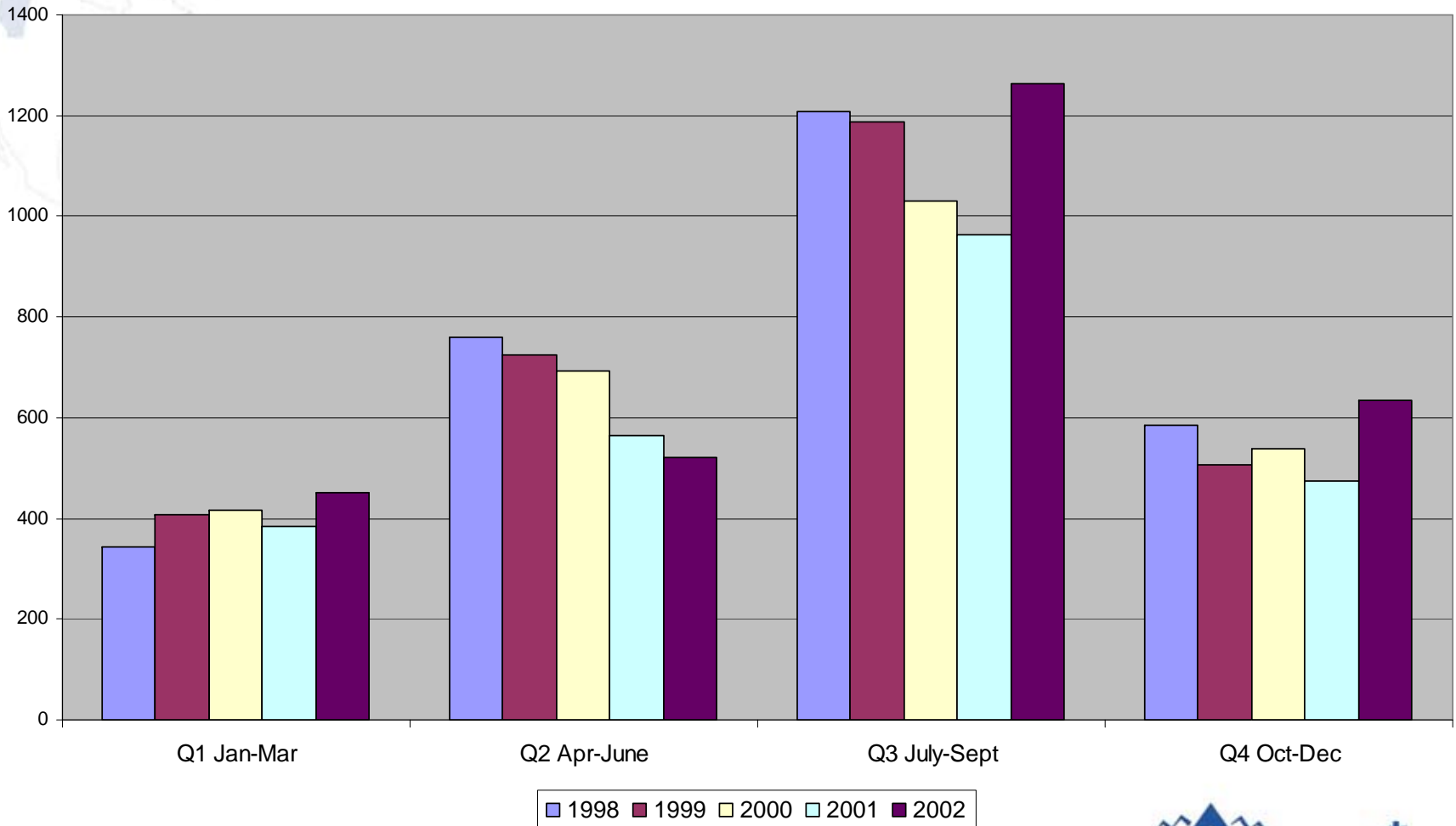


# Average Length of Stay (overnight visits)

The chart shows the change in average length of stay in the Central Alberta TDR.

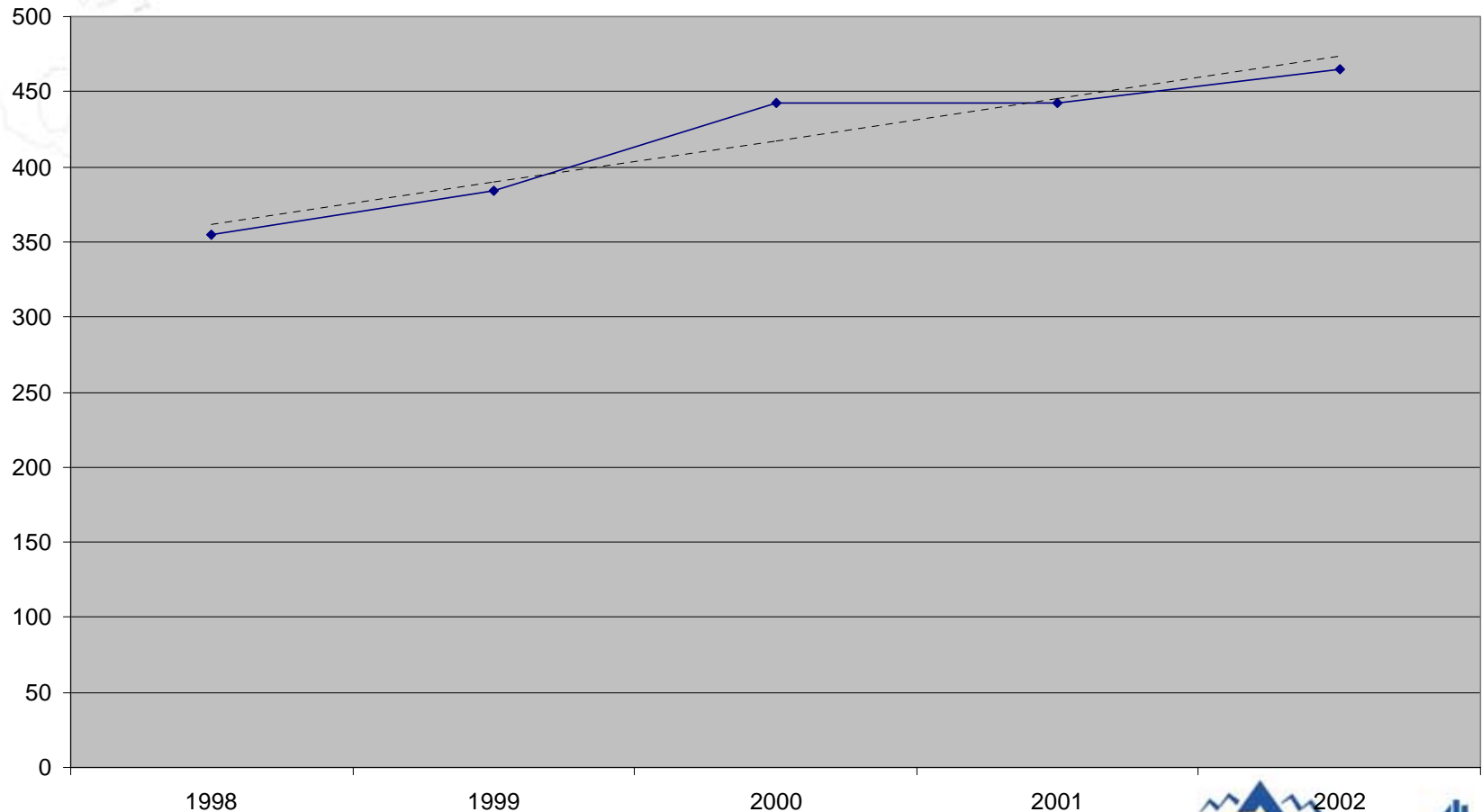


# Quarter of Year when overnight trips are taken to the Central Alberta TDR



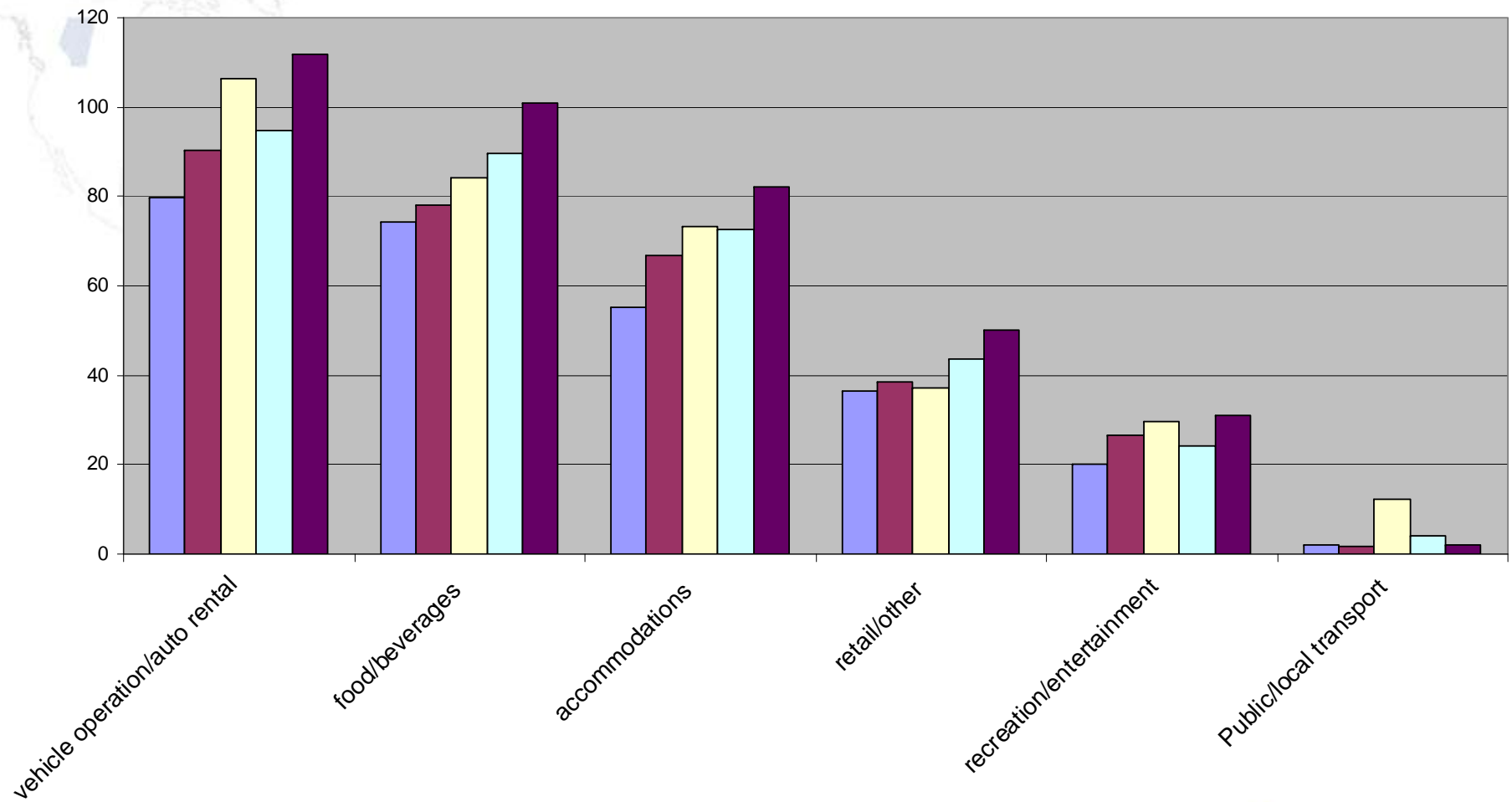
# Total Expenditures in the Central Alberta TDR

Total expenditures in the Central Alberta TDR have been rising over the past five year as indicated by the trend line (dotted line). Value is in \$ millions.



Person-visits are same-day and overnight for domestic visitors and overnight for international visitors.

# Total Overnight Expenditures in the Central Alberta TDR (\$ millions)



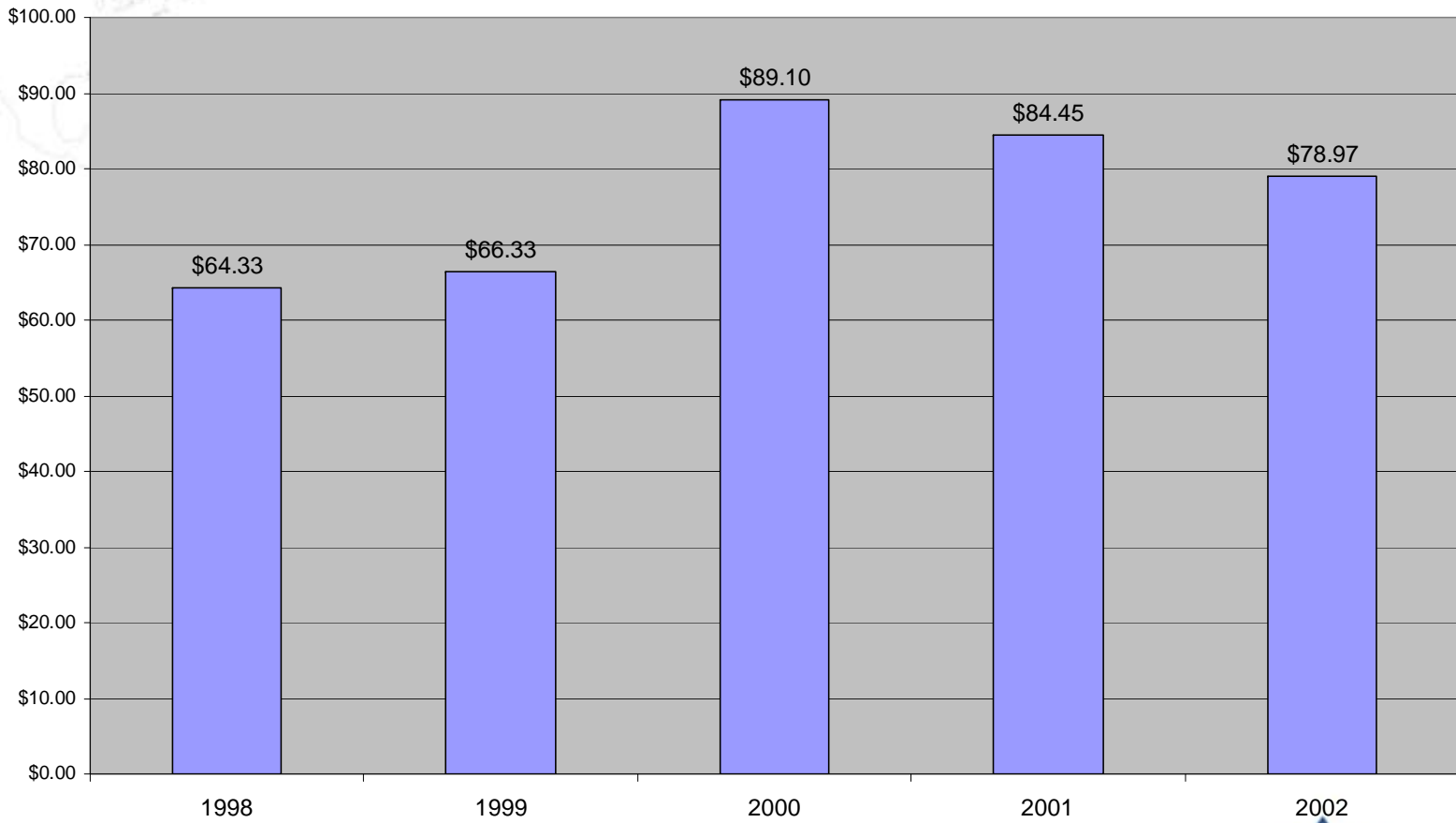
1998 1999 2000 2001 2002





# Average spending per party per night (overnight visits)

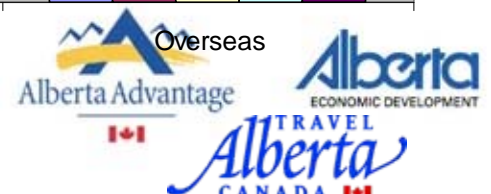
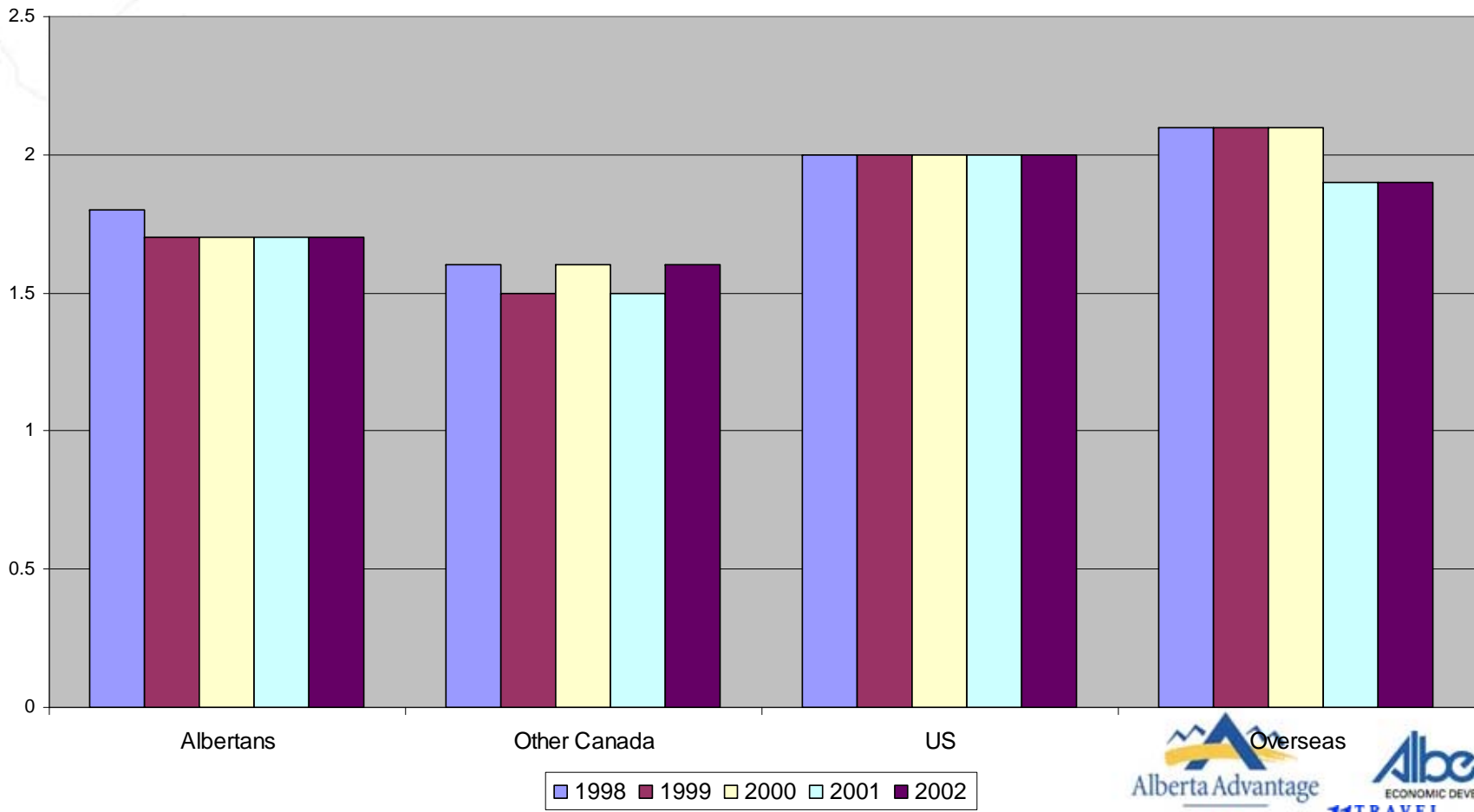
The chart shows the change in average spending per party per night in the Central Alberta TDR.





# Average Party Size to Alberta

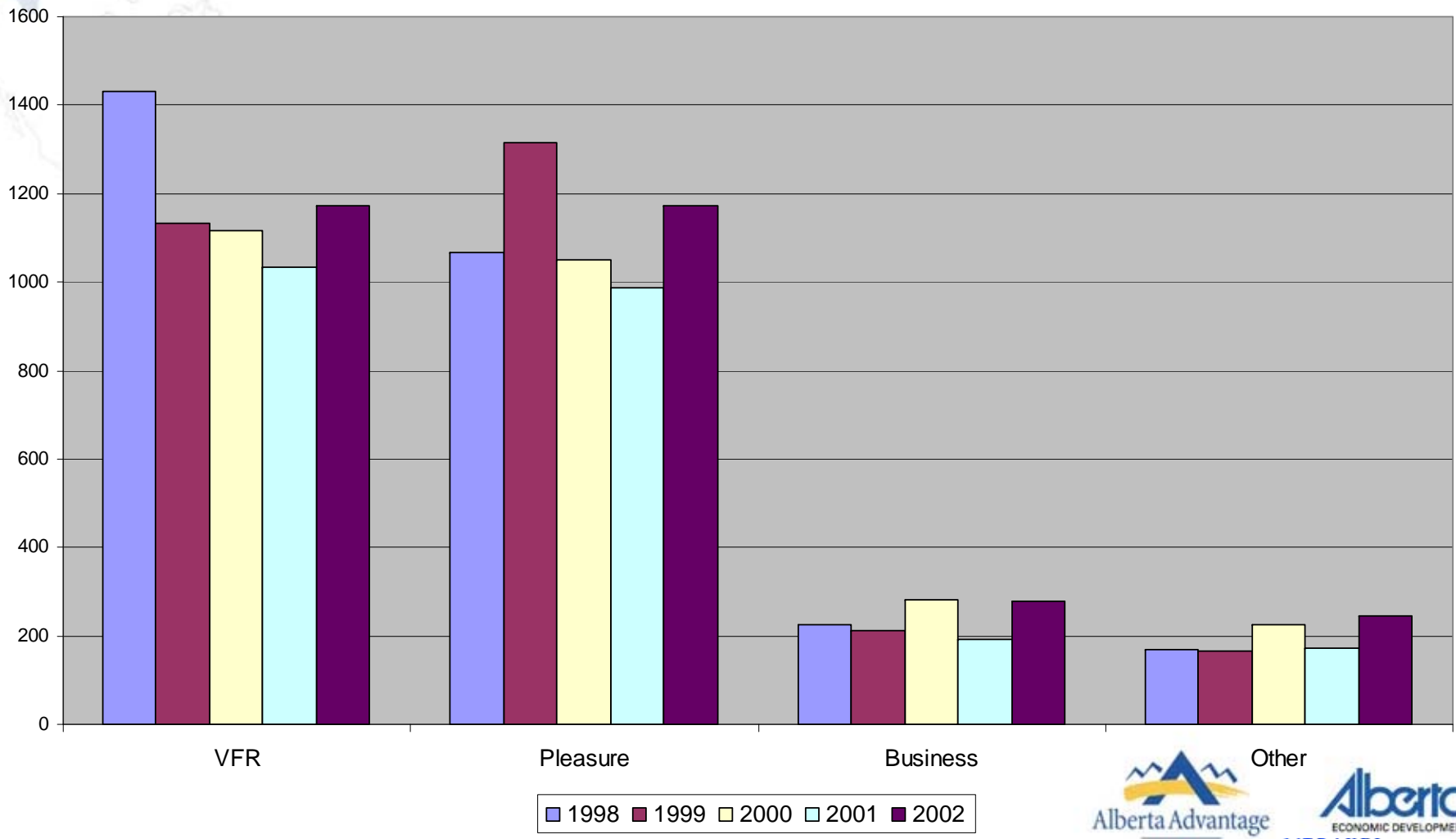
The chart shows the change in average party size for all visitor parties to and within Alberta by geo-market. There is no significant difference between party sizes to TDRs.



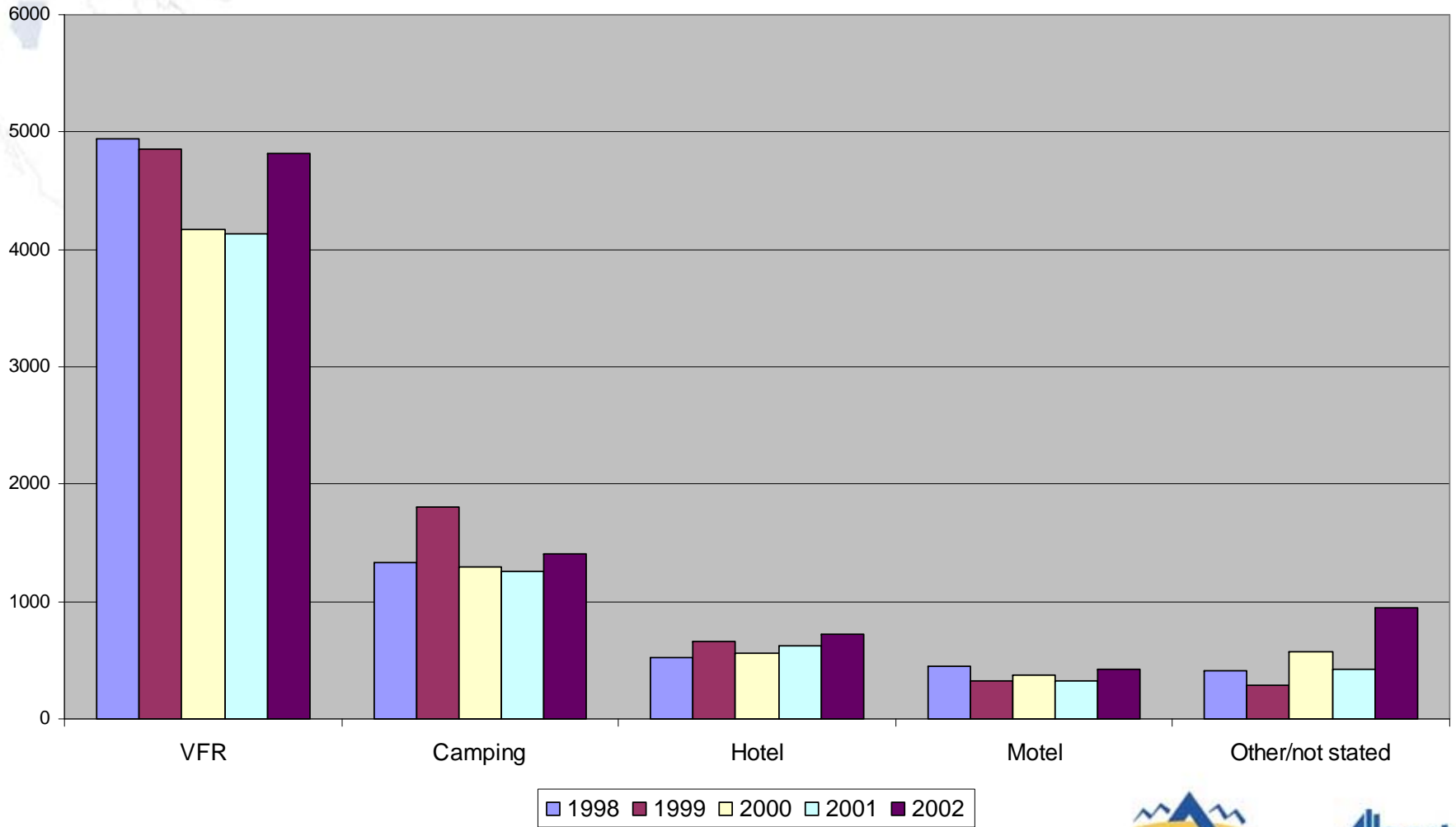


# Purpose of overnight trip to the Central Alberta TDR (000s)

Note: Purpose of trip is asked for the overall trip and is not specific to a TDR.

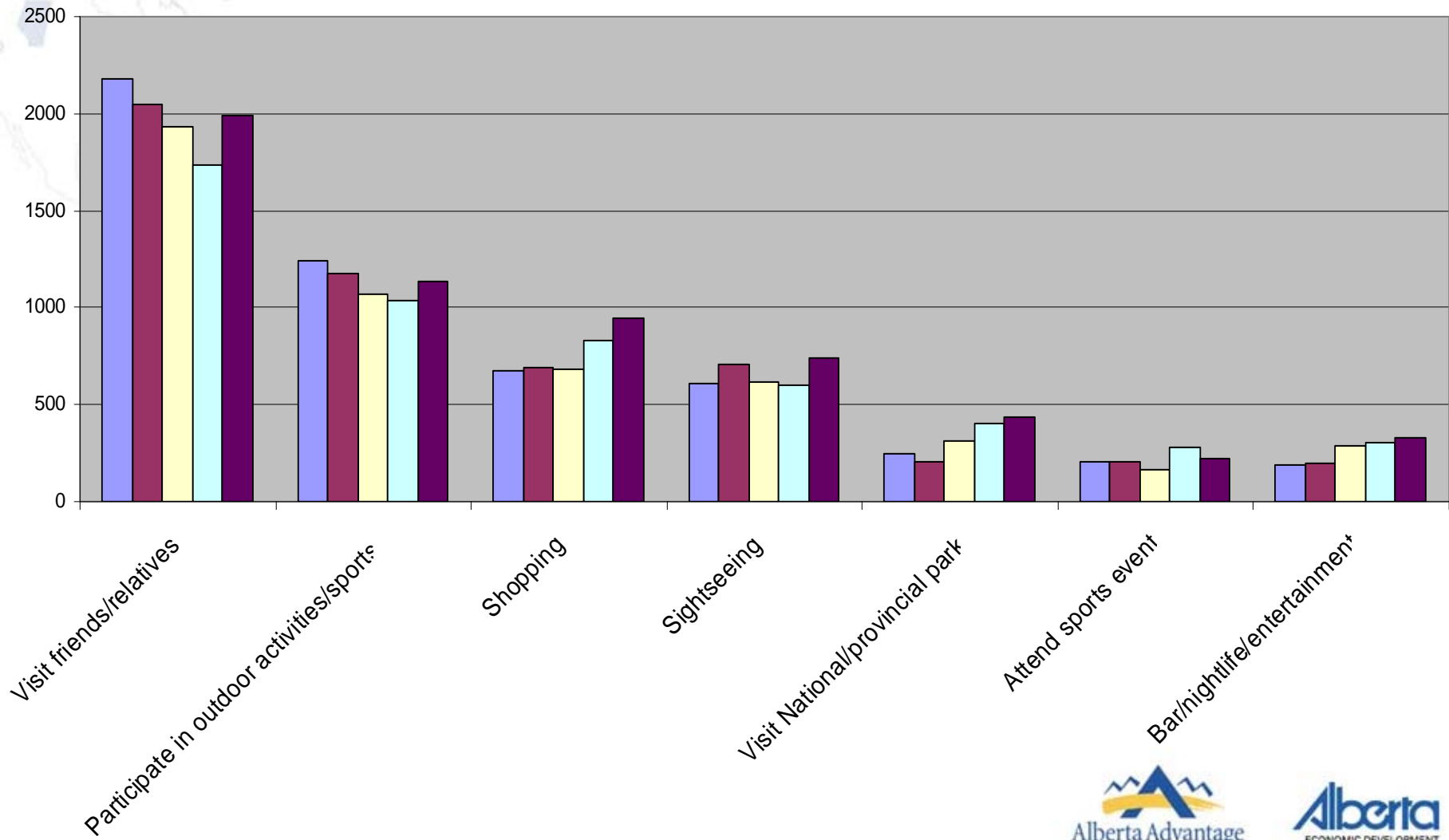


# Type of Accommodation (person-nights) (000s)

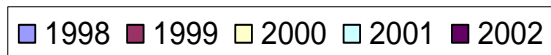




# Activities (overnight visits) (000s)



Overnight person-visits can include multiple activities.





# Pre-Summer Operator Study

- Southern and central Alberta operators generally experienced early-season occupancy increases above 2003.
- Red Deer and Medicine Hat hotels reported on average a stronger season with several operators experiencing increases of 15 per cent.
- Lethbridge was equal or slightly below 2003 figures with aggressive pricing in that market.
- Strength in crew and corporate business continued in all markets. Increased walk-in traffic on the upside and a decrease of agricultural-related business on the downside was reported.
- Strong sports tournament business raised weekend occupancy.
- Red Deer is forecasting stronger sports-related, wedding and special-event business.



# Summer Travel Intentions

- Albertans, who plan to take at least one trip between **May 1 and October 31, 2004**, are planning to take an average of 7.4 leisure trips during the next 6 months. This is up significantly from 5.4 trips planned between June and November last year.
- Alberta will receive the largest proportion of Albertans' tourism, with 77% of trips planned to Alberta destinations.
  - o Albertan travelers are planning to take significantly more trips in Alberta than a year ago, with an average of 5.7 trips planned in Alberta (vs. 3.8 in June - Nov 2003).
- Albertans plan to take 1.7 trips on average to destinations outside the province (compared to 1.6 a year ago).
  - o BC is the top destination, with 40% of all Albertan travelers planning at least one trip to BC during the next 6 months.



# Summer Travel Intentions

## Trip Duration

- The average duration of trips taken in Alberta over the next 6 months will be slightly shorter this year compared to last, with half of all trips lasting a weekend, and only 20% lasting 3 nights or longer.

## Trip Planning

- While one-quarter of Albertan travelers take trips with only last minute planning or no planning at all, the vast majority of trips are planned between 2 weeks and 3 months in advance.
- The top information resources used to plan leisure trips include: the Internet (40%), word-of-mouth (34%), previous experience (21%), and the AMA including AMA website (20%).

## Travel Party Composition

- 41% of households are planning trips as adult couples.
- 37% of households are planning trips as families with children under 18.
- 22% of households are planning trips as friends traveling together.



# Summer Travel Intentions for Central Alberta TDR

- The mean age of Alberta travellers coming to Alberta Central is 44.
- A slightly higher percentage of visitors are male (55%) than female.
- Mean household income for travellers visiting Alberta Central is \$70,300.
- With 31% of Albertan travellers planning to travel to Central Alberta, this region will receive the second highest proportion of Albertan travelers.
- Of all the travellers to the Alberta Central TDR over the next six months, 38% will be from Edmonton and area and 29% will be from Calgary.
- Meanwhile, 37% of all travellers from Edmonton and 26% of all travellers from Calgary will travel to Alberta Central over the next six months.
- 30% of Central Alberta households plan to take at least one trip in Central Alberta over the next six months.