



# Alberta South TDR

Visitor Statistics 1998-2002

Pre-Summer Operator  
Survey 2004

Summer Travel Intentions  
2004





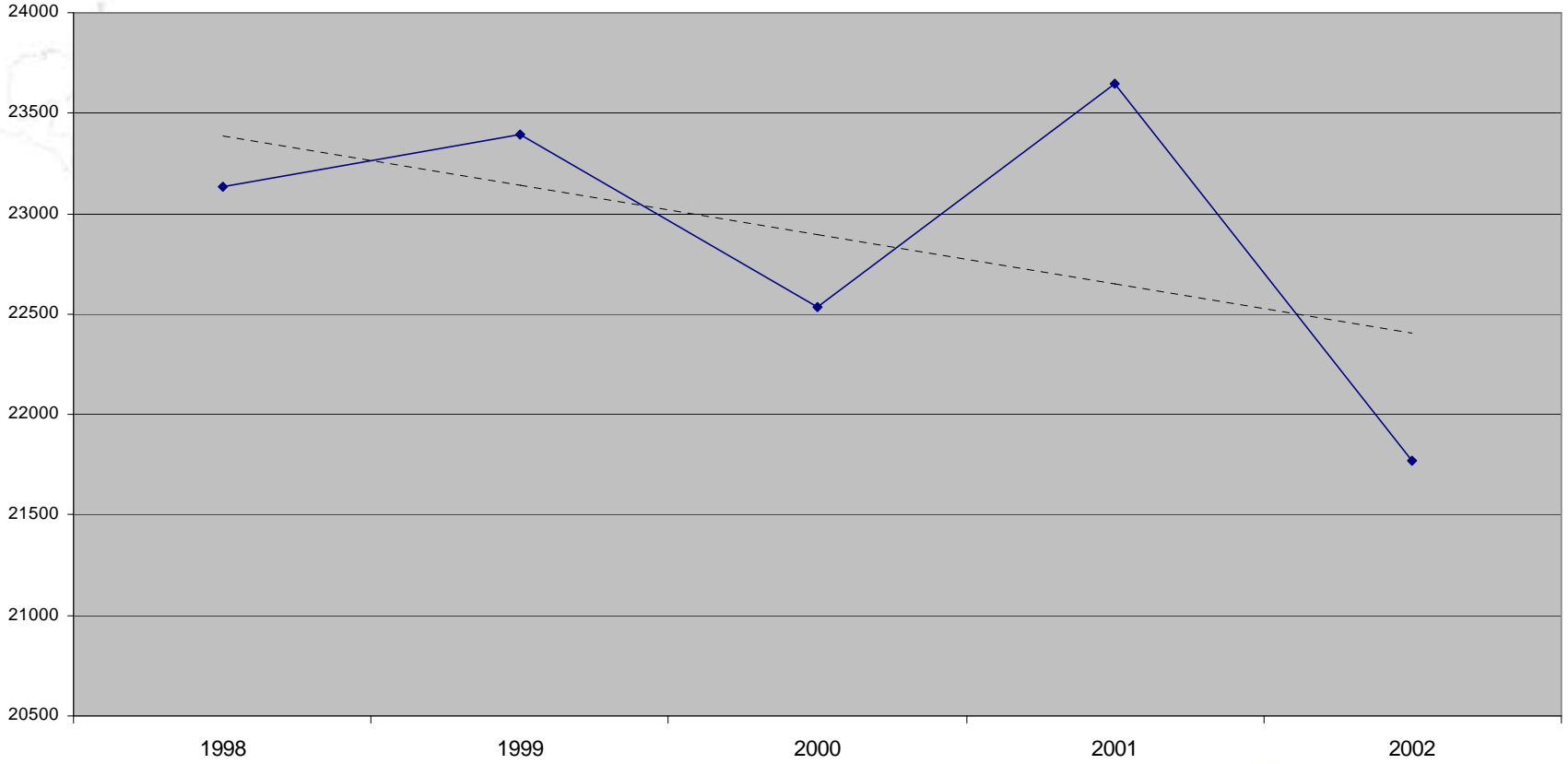
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  - Summary of Alberta South TDR results



# 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.

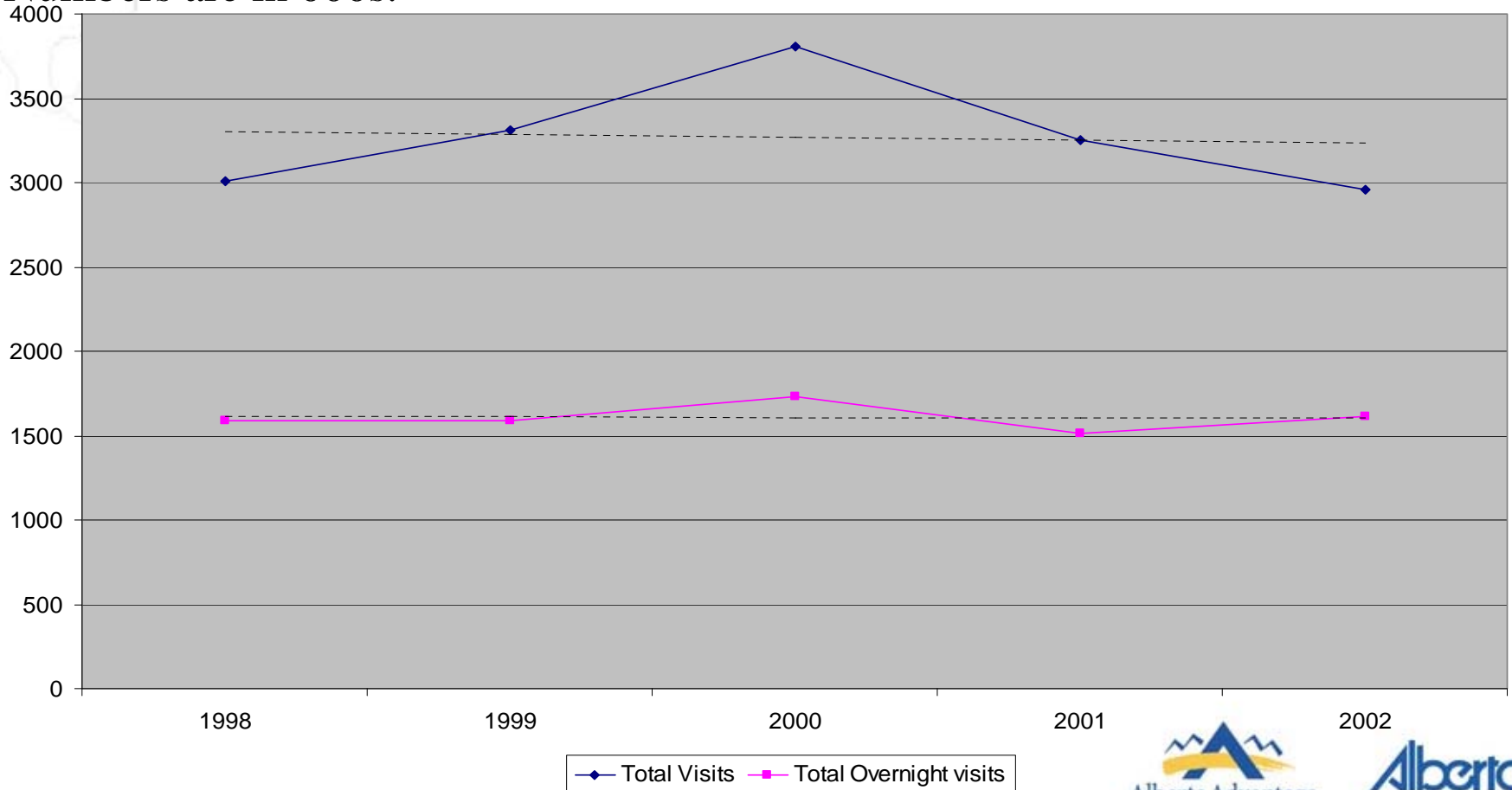




# Visits to Alberta South TDR

Total visits and overnight visits to Alberta South TDR has remained relatively constant over the past five years as indicated by the trend line (dotted line).

Numbers are in 000s.



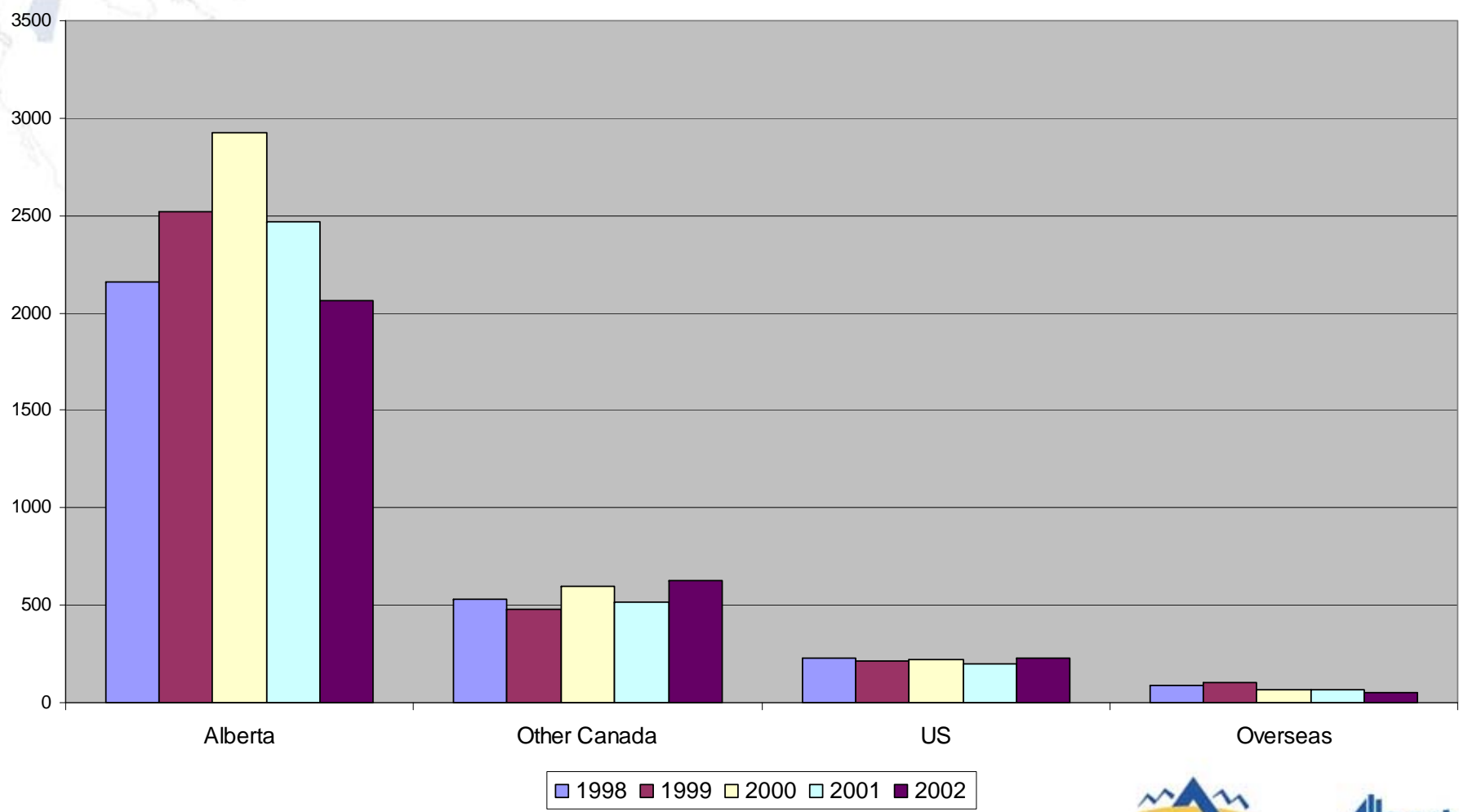
◆ Total Visits    ■ Total Overnight visits



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



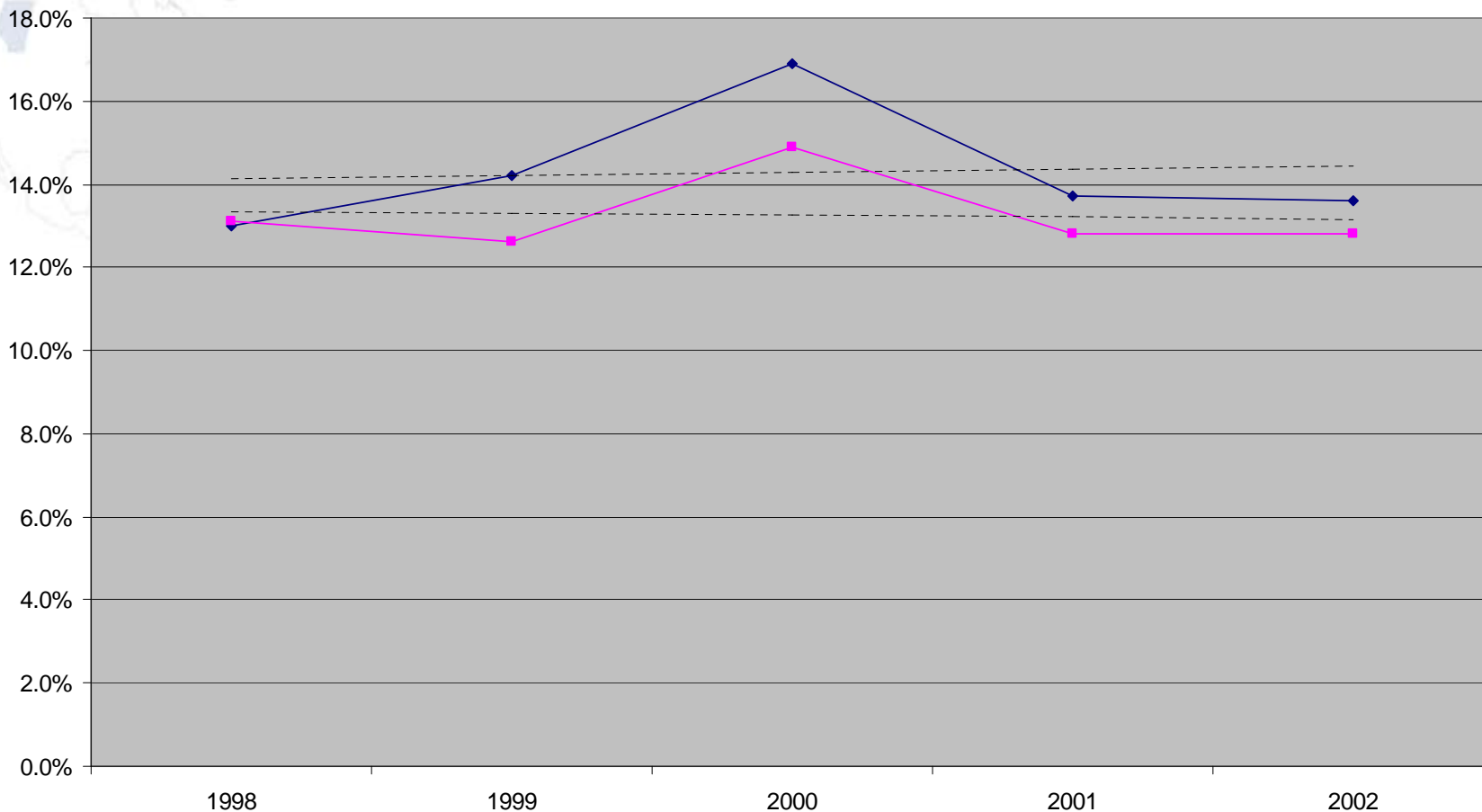
# Total Visits (000s) to Alberta South TDR by geo-region



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



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



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

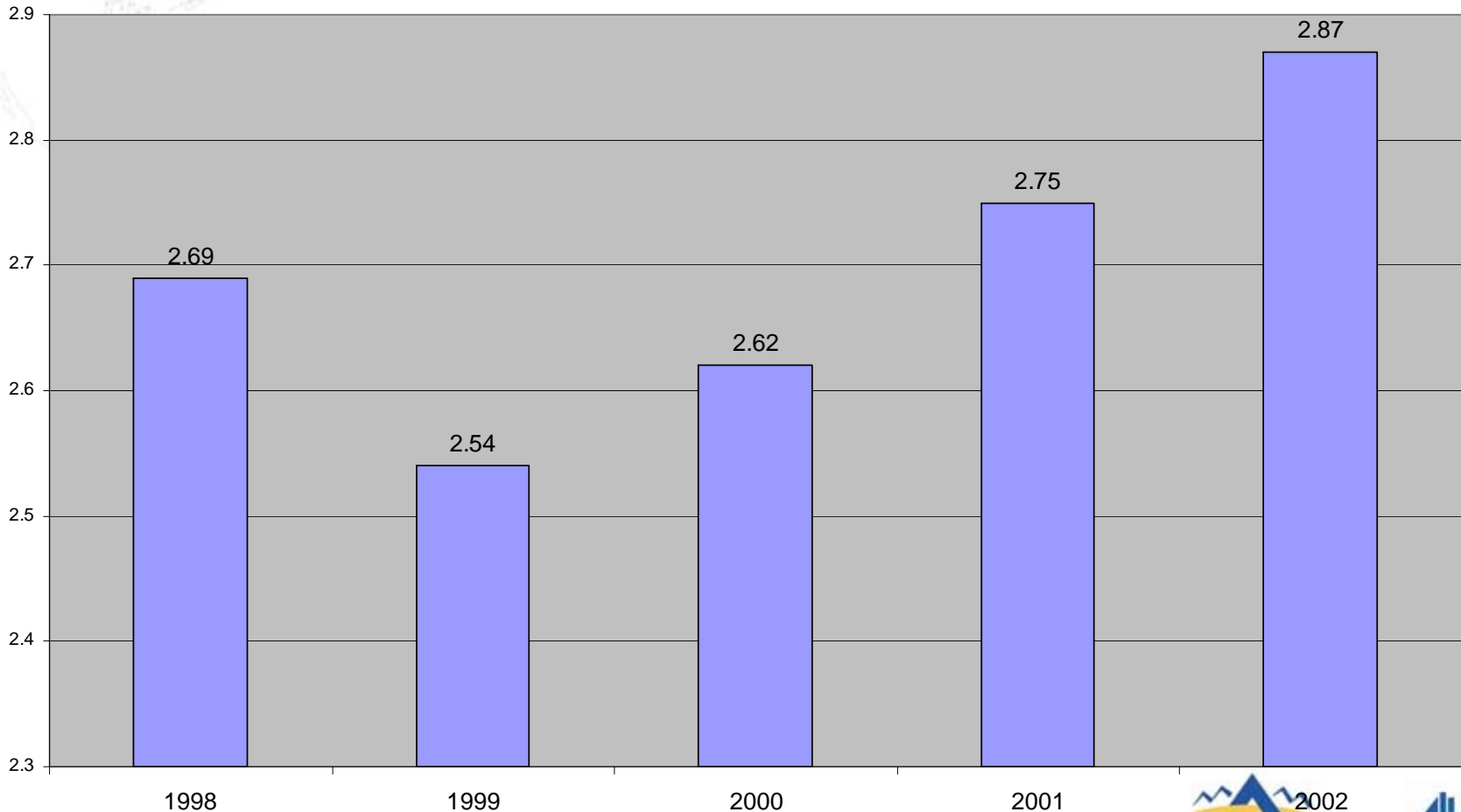
◆ All visits    ■ Overnight

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

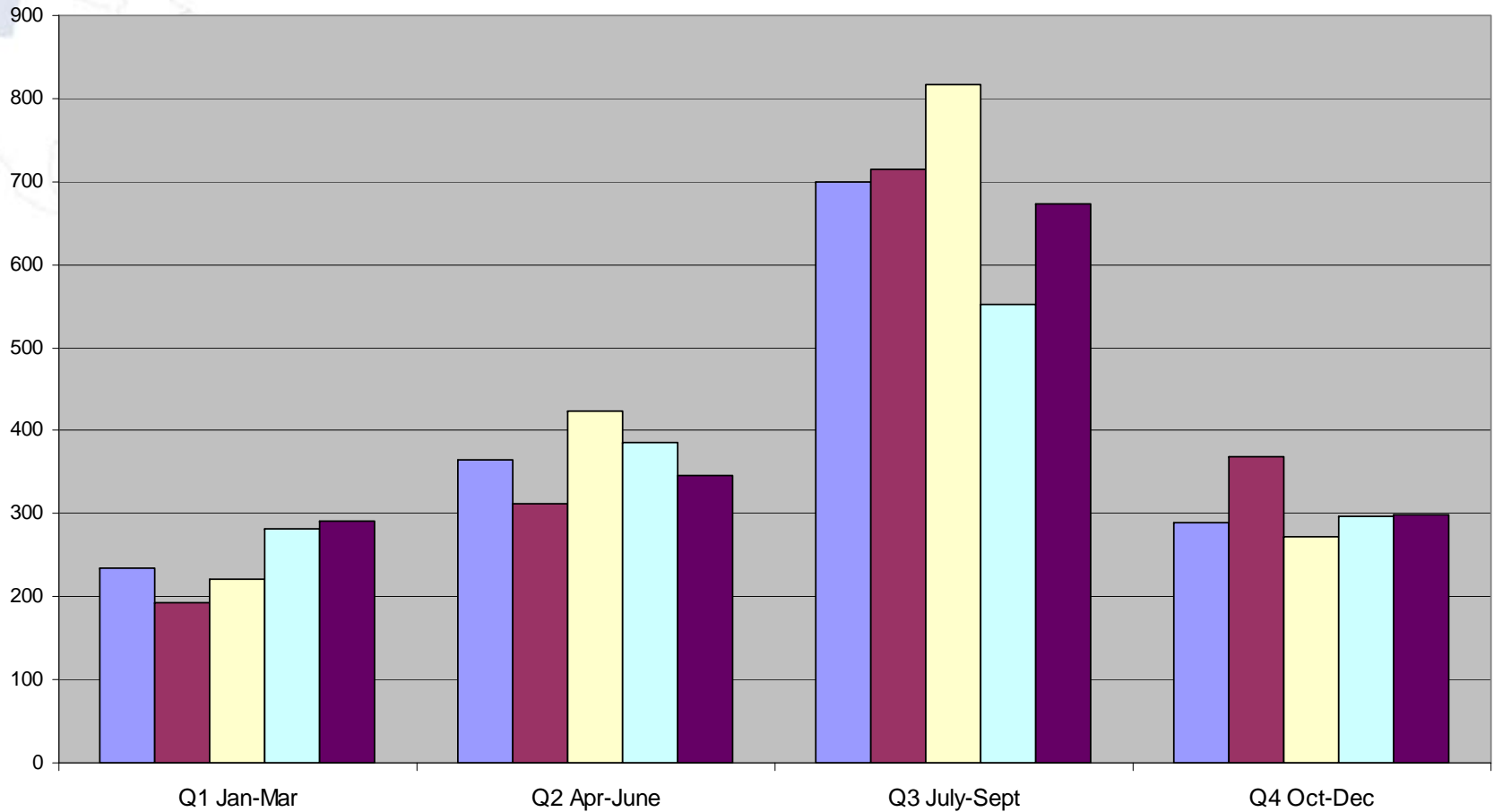


# Average Length of Stay (overnight visits)

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



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

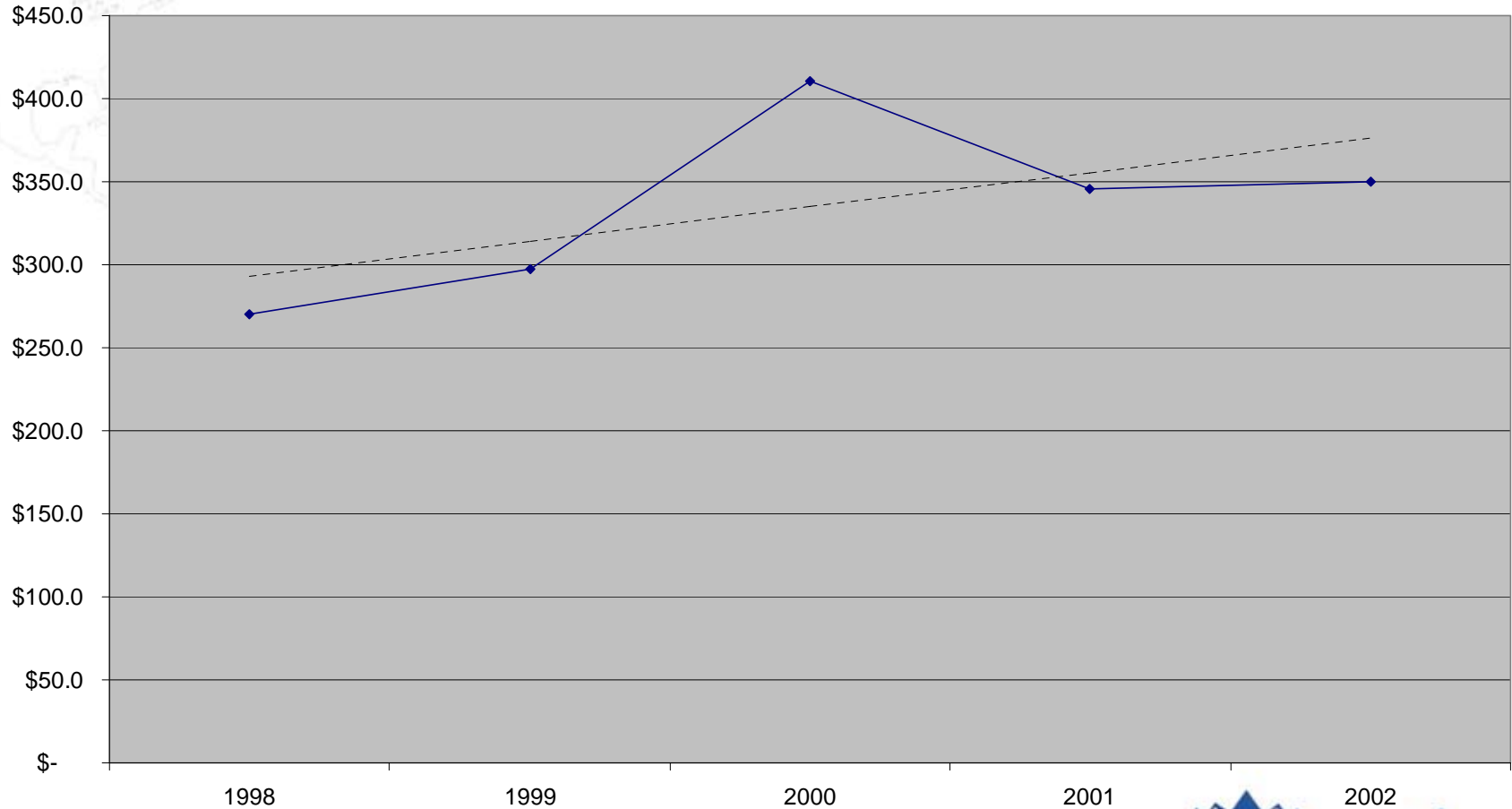


Value in 000s

■ 1998 ■ 1999 ■ 2000 ■ 2001 ■ 2002

# Total Expenditures in the Alberta South TDR

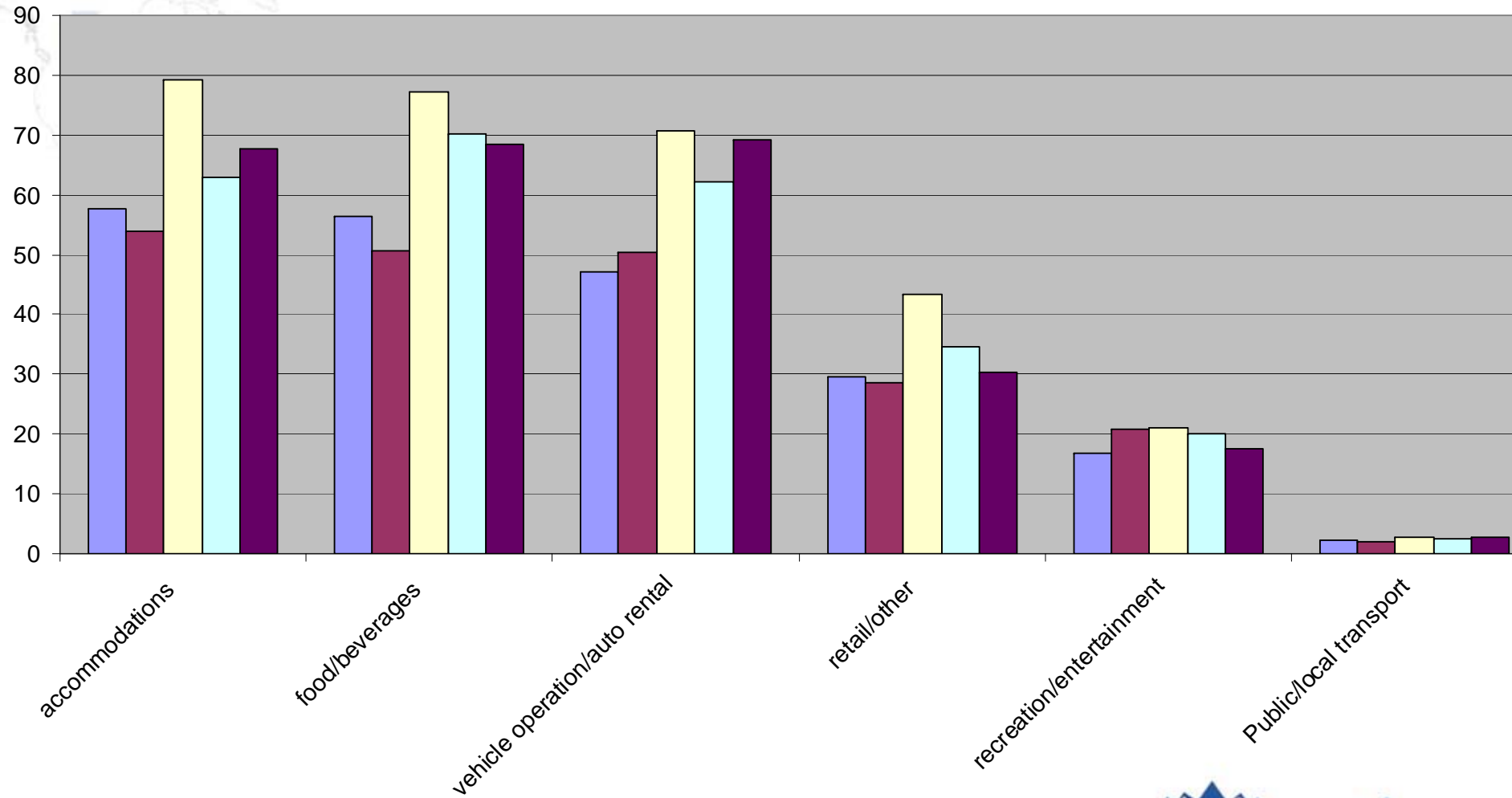
Total expenditures in the Alberta South TDR have been rising over the past five year as indicated by the trend line (dotted line). Value is in \$ millions.



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



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



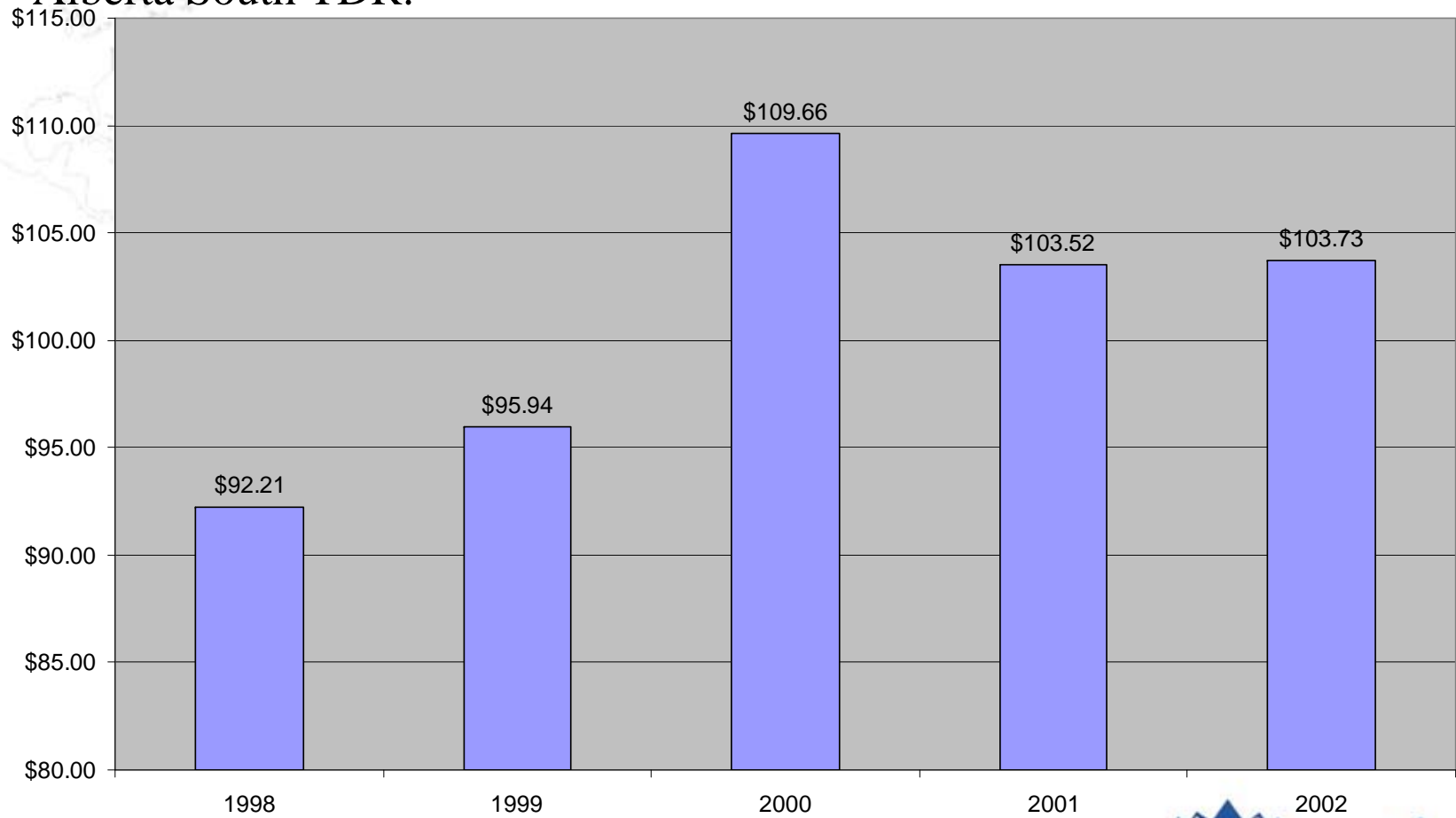
Legend: 1998 (light blue), 1999 (maroon), 2000 (yellow), 2001 (cyan), 2002 (dark purple)





# Average spending per party per night (overnight visits)

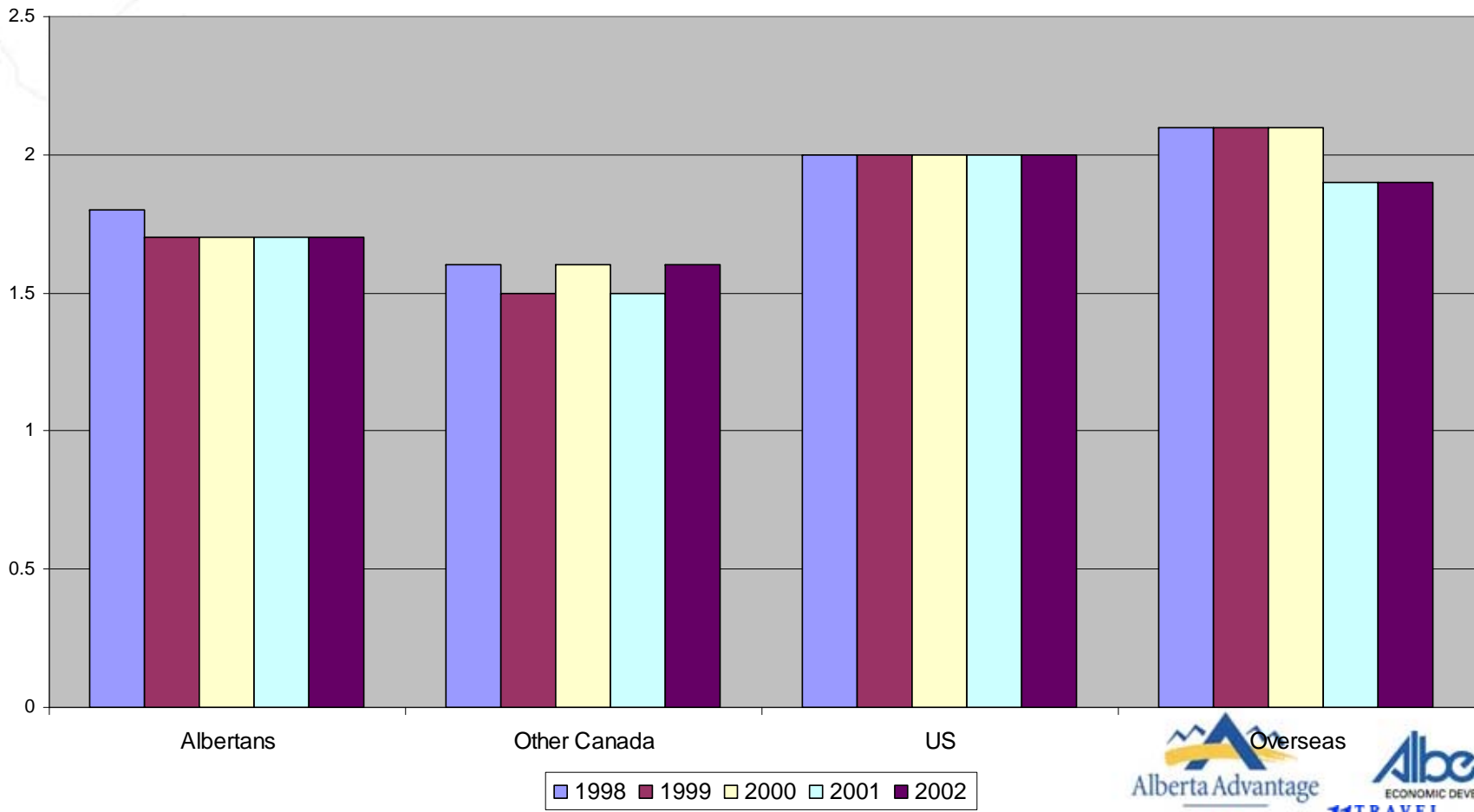
The chart shows the change in average spending per party per night in the Alberta South TDR.





# Average Party Size to Alberta

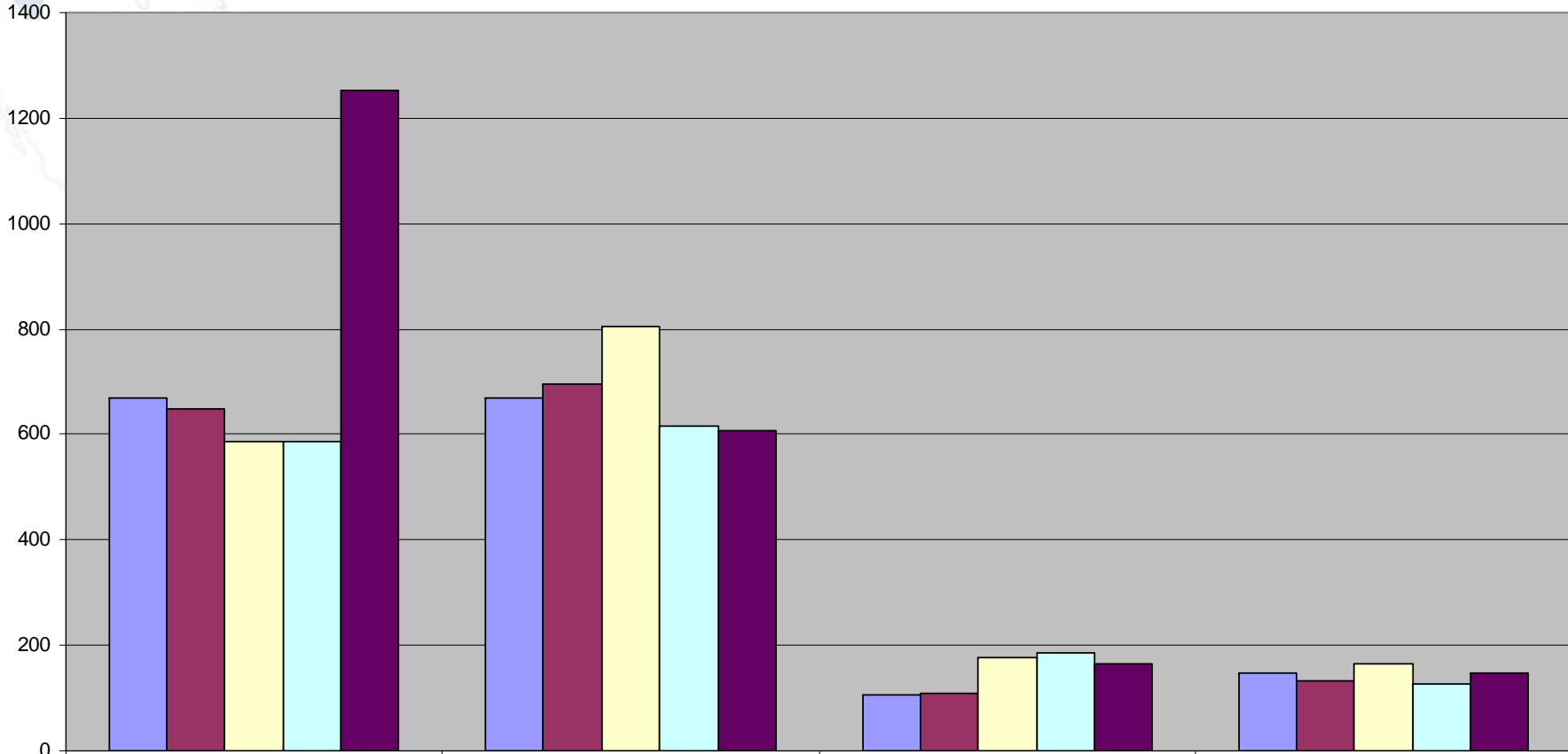
The chart shows the change in average party size for all visitor parties to and within Alberta by geo-market. There is no significant difference between party sizes to TDRs.





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

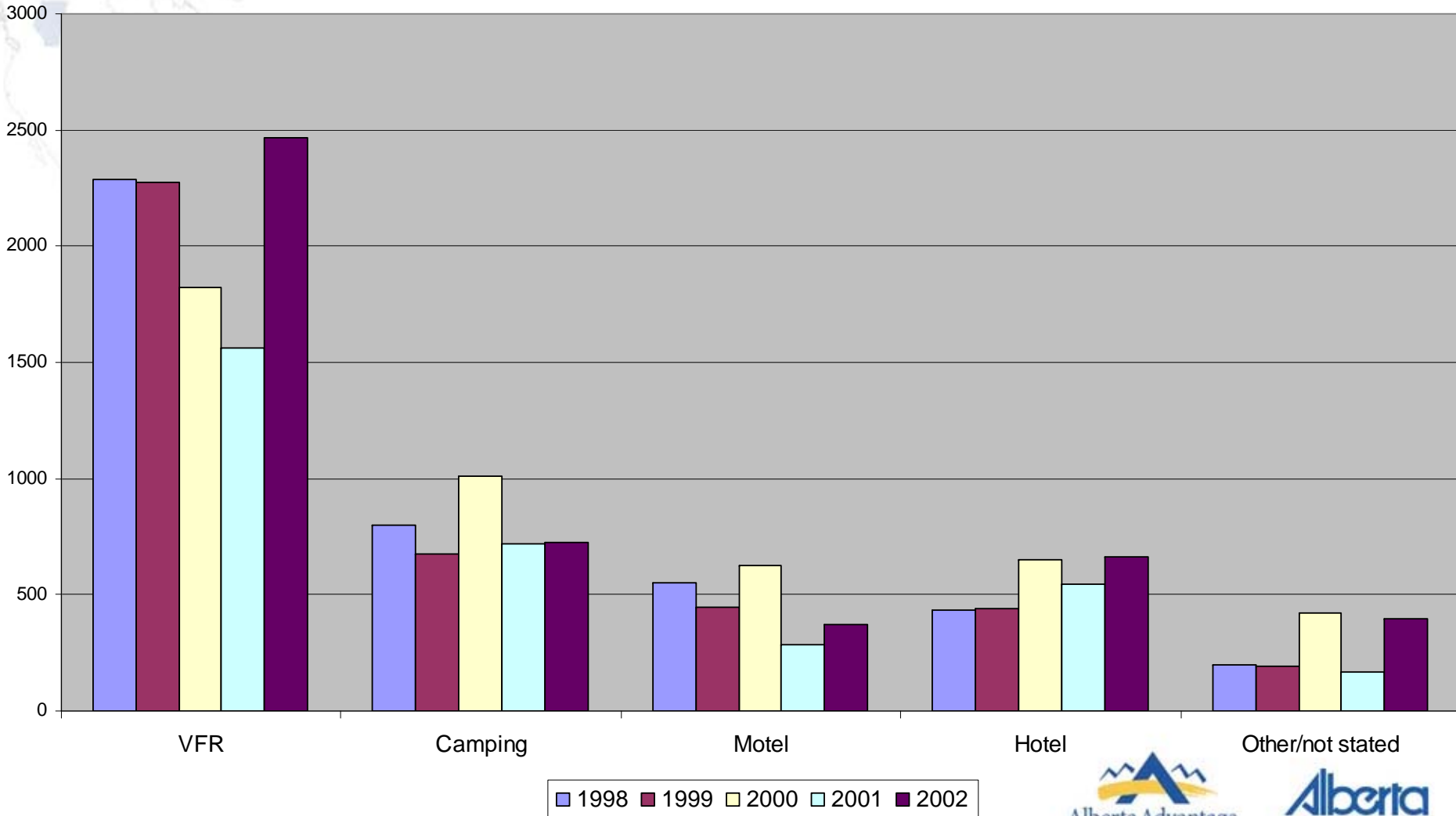
Note: Purpose of trip is asked for the overall trip and is not specific to a TDR.



■ 1998 ■ 1999 ■ 2000 ■ 2001 ■ 2002

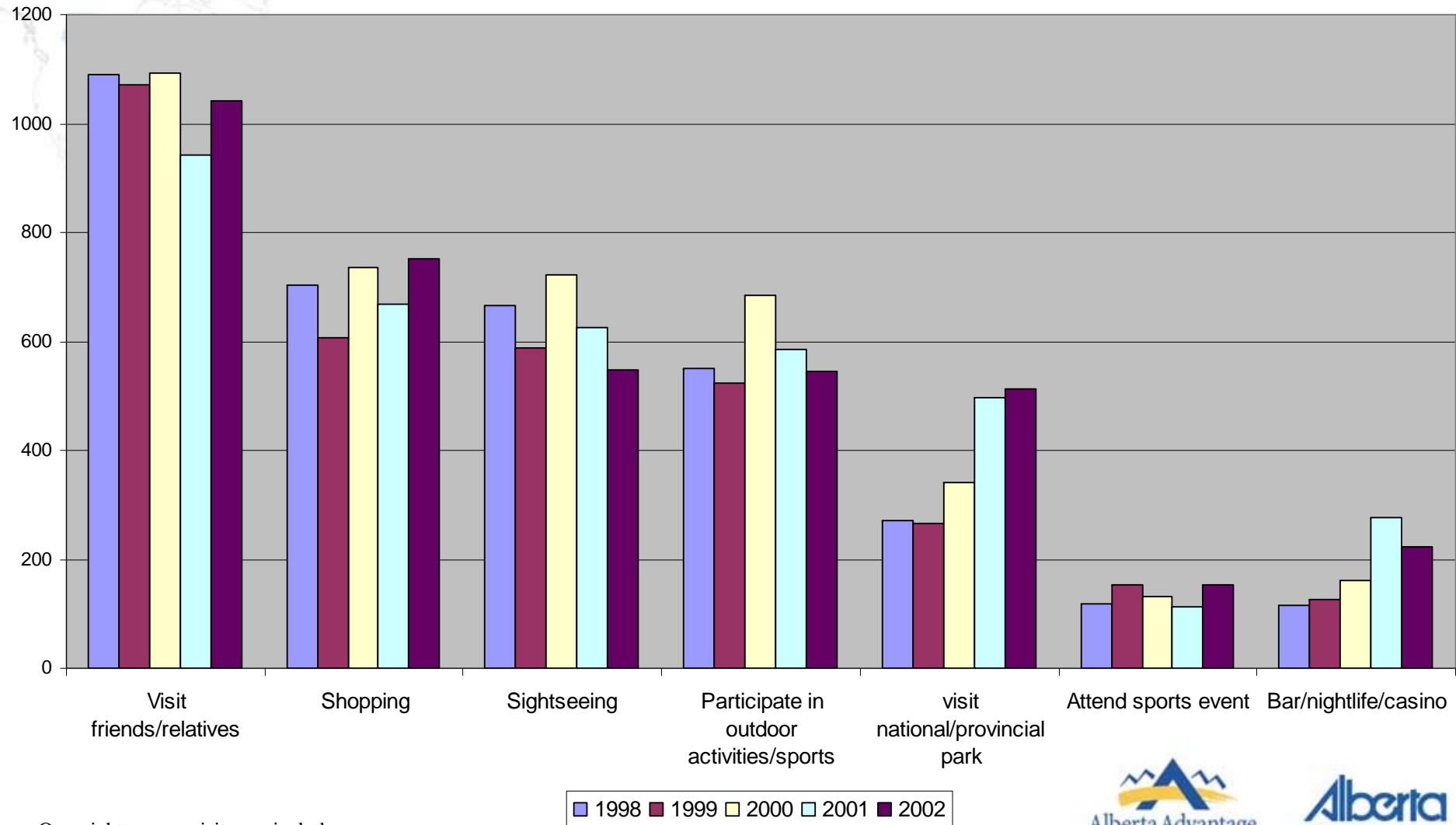


# Type of Accommodation (person-nights) (000s)





# 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.
- Southern communities depend to a large extent on the agricultural-dependent rural leisure traveller.
- Hotels in the south and central look for slightly higher occupancy this year.
  - Medicine Hat is the exception; they are anticipating a much better summer season.
- Southern operators are looking for increases in regional rubber tire traffic, from western Canada and the United States. Tour business is not large, but appears stronger than in 2003.



# 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 travelers coming to Alberta South is 48, with a higher than average concentration in the 65 and older age group, and a lower than average concentration in the 25-44 age bracket.
- Mean household income for travelers visiting Alberta South is \$67,800.
- With only 23% of Albertan travelers planning to travel to Southern Alberta, this region will receive the second lowest proportion of Alberta visitors of all of the Tourism Destination regions. (This is the same as last year)
- Of all Albertan leisure travelers to Alberta South over the next six months, 43% will be from the Calgary region.
- 44% of Southern Alberta households plan to take at least one trip in the region over the next six months.
- Travelers to the South TDR will also go to Edmonton, Calgary, Rockies and Central in similar numbers. The smallest proportion will be going to the North as well.