



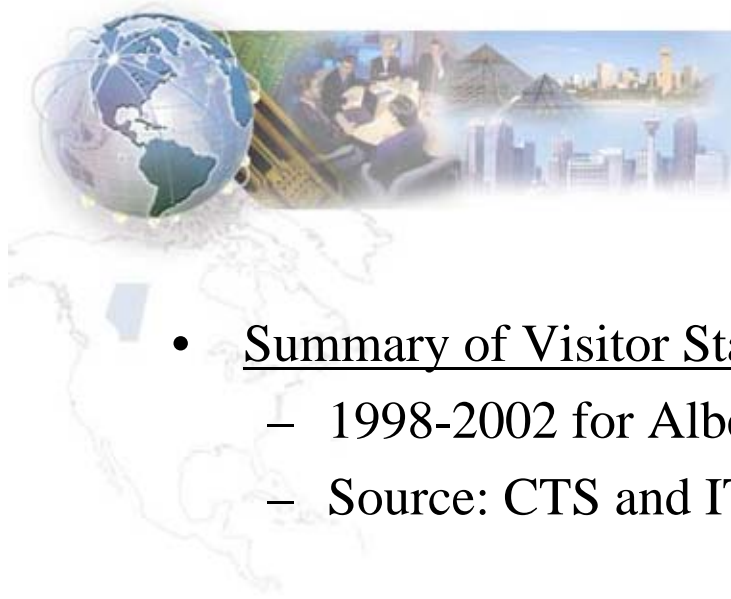
Alberta North TDR

Visitor Statistics 1998-2002

Pre-Summer Operator
Survey 2004

Summer Travel Intentions
2004





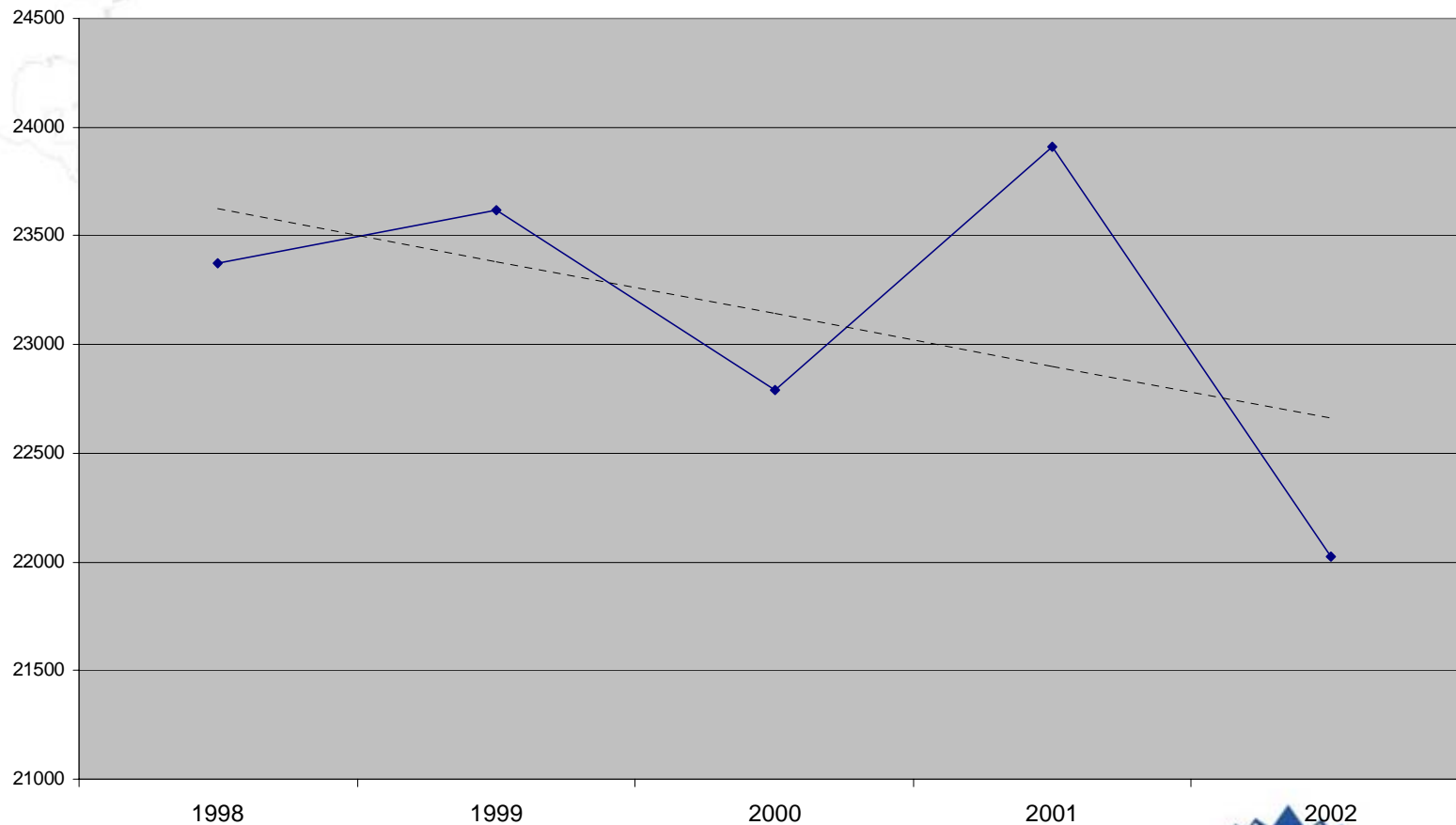
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 - 1998-2002 for Alberta North
 - Source: CTS and ITS, Statistics Canada
- Pre-Summer Operator Survey
 - Highlights on Other Alberta respondents
- Summer Travel Intentions 2004
 - Summary of Alberta results
 - Summary of Alberta North TDR results



Total Visits to Alberta (000s)

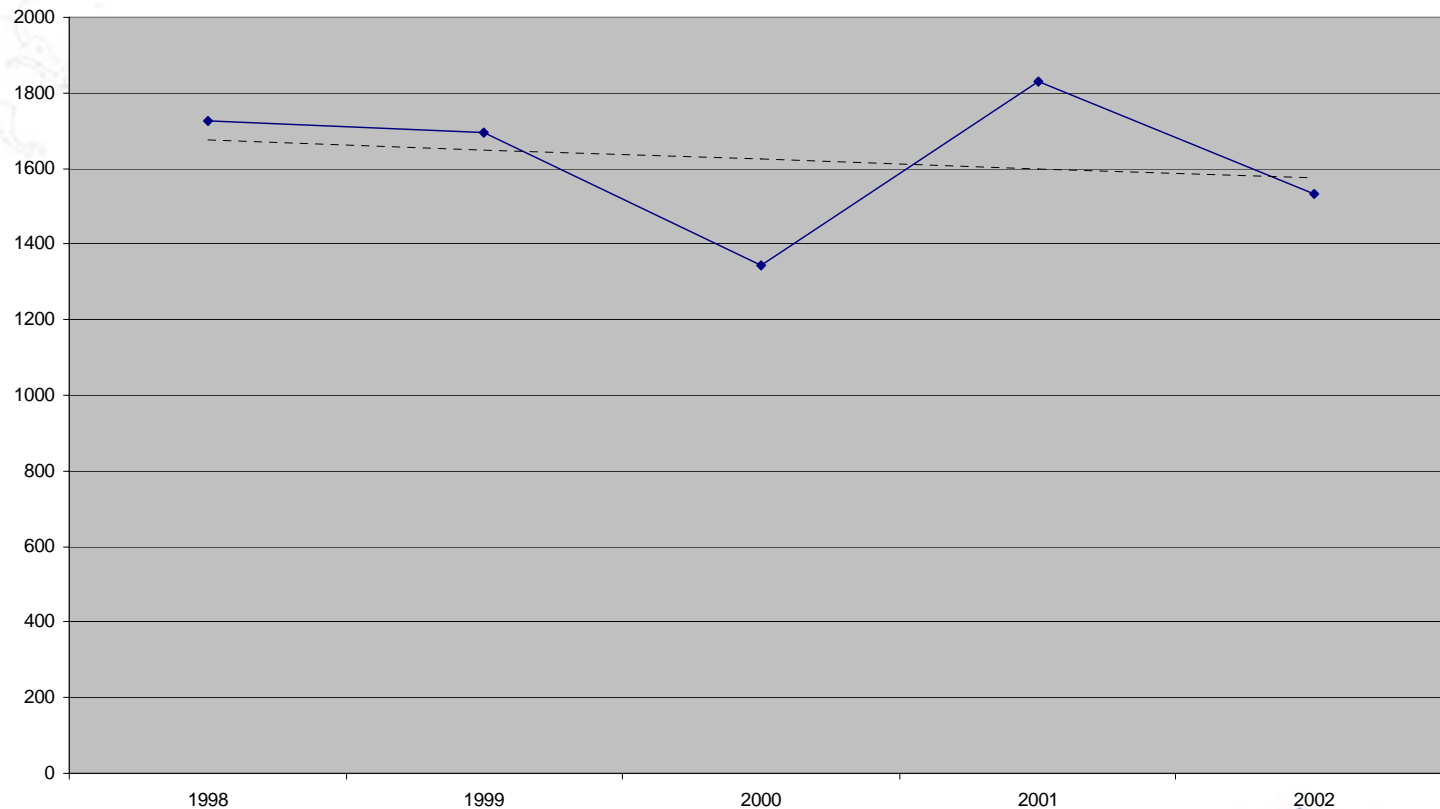
Total visits to Alberta have been declining over the past five years as indicated by the trend line (dotted line).





Total Visits to Alberta North TDR

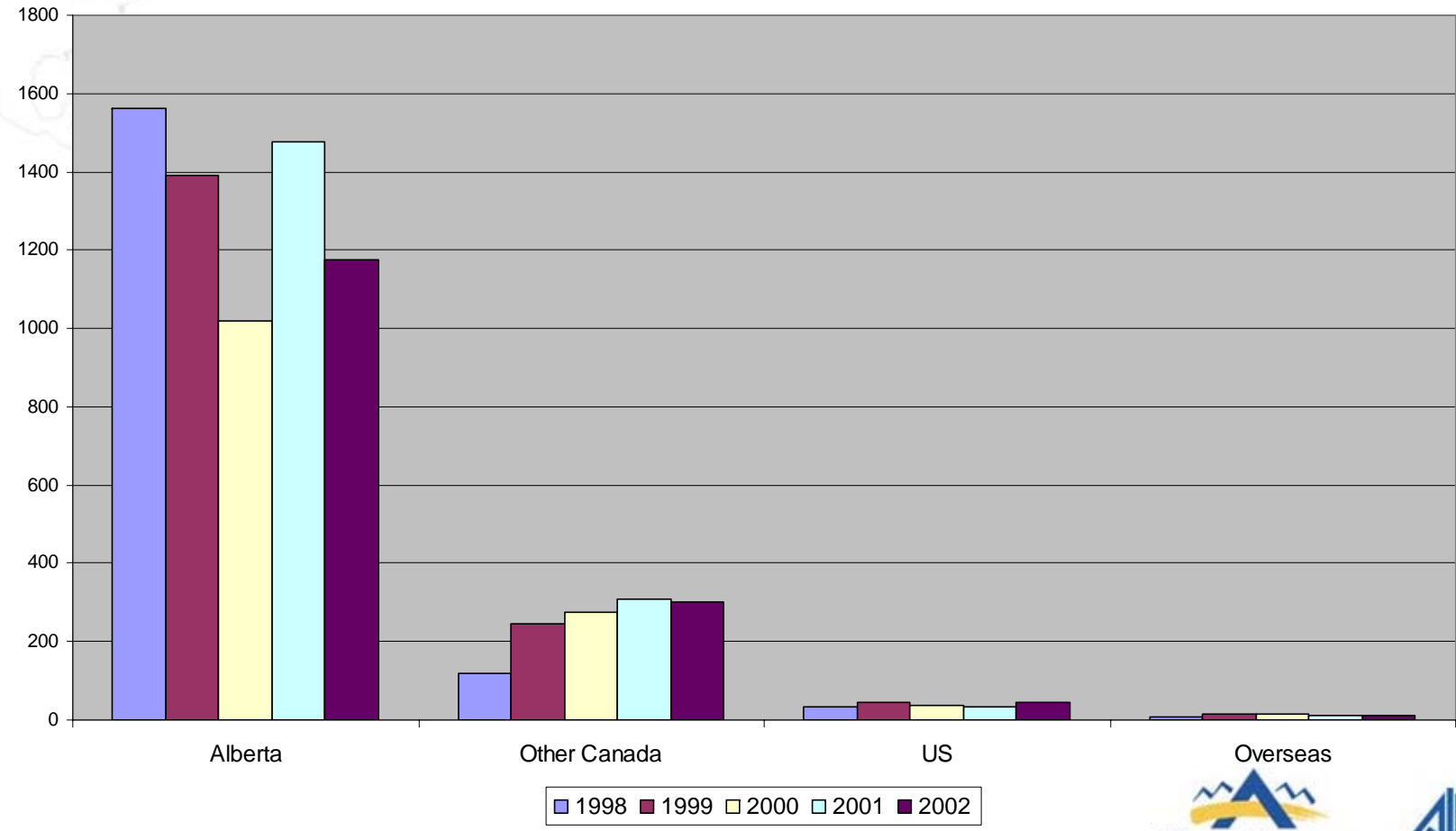
Total visits to Alberta North have been slightly declining over the past five years as indicated by the trend line (dotted line). Numbers are in 000s.





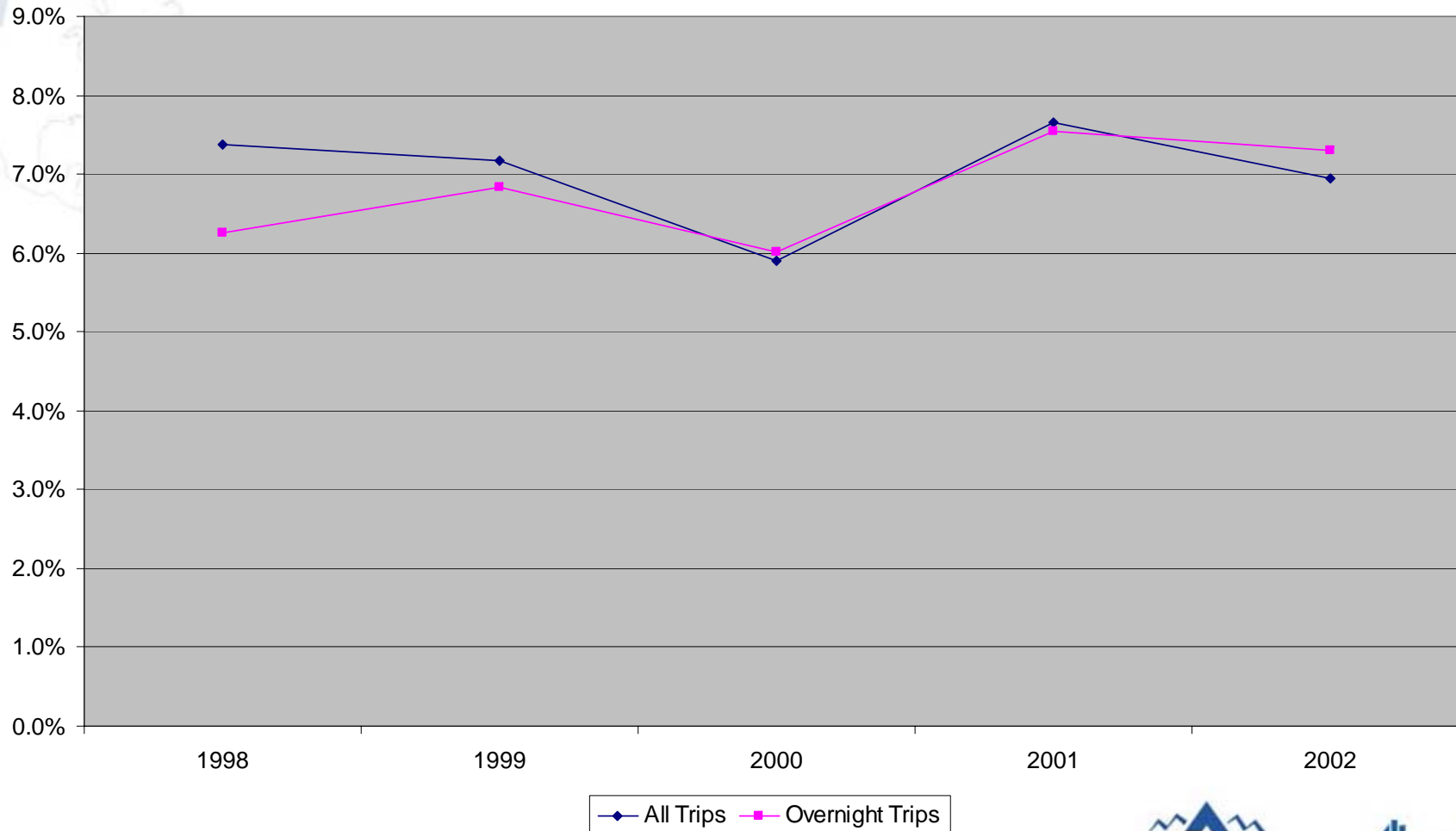
Total Visits (000s) to North TDR by geo-region

Over the five year period, Albertans have been travelling less to the TDR, while visitors from other parts of Canada have been travelling more to the region.





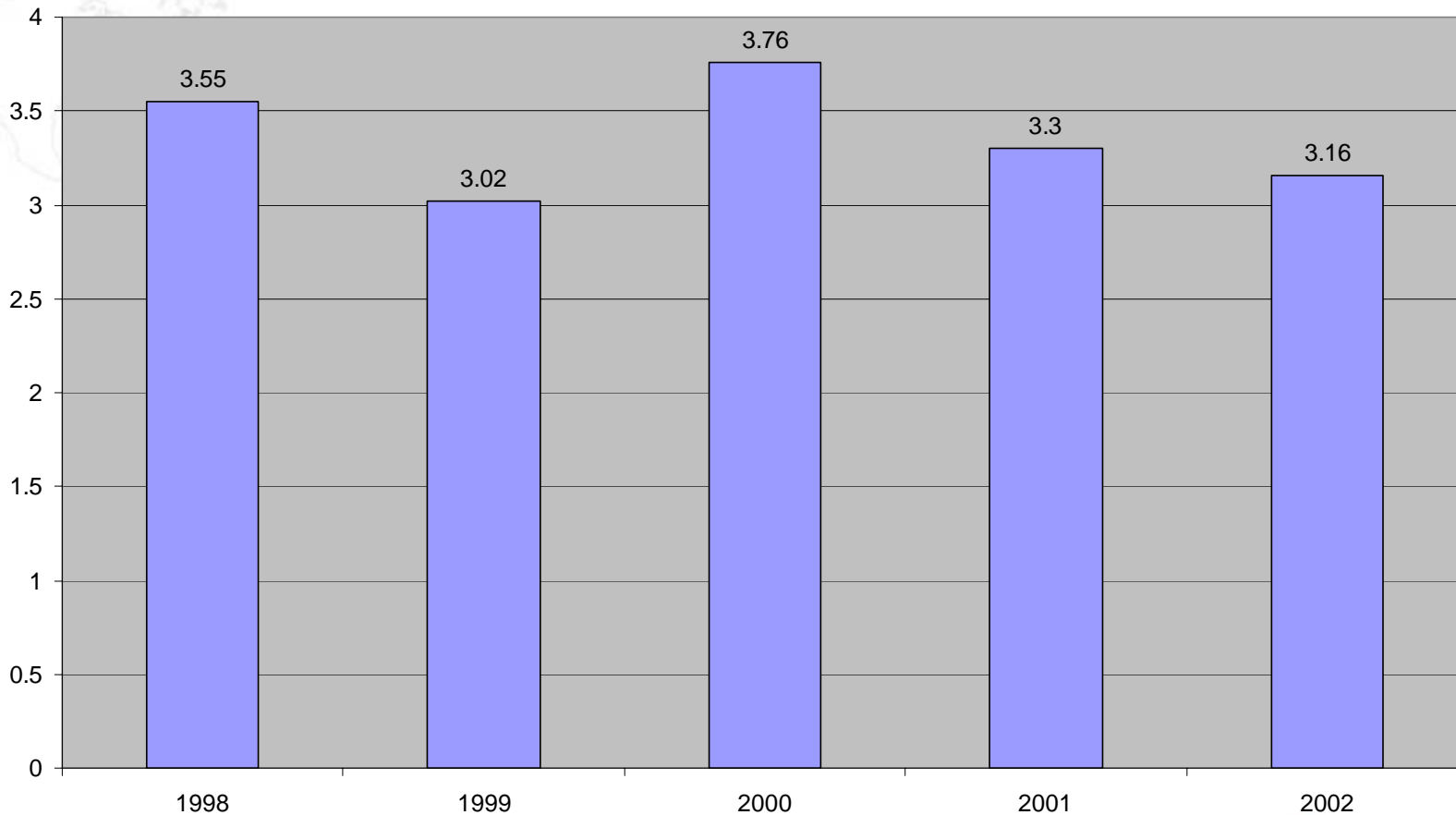
% of all visits to, or within, Alberta that go to Alberta North





Average Length of Stay (overnight visits)

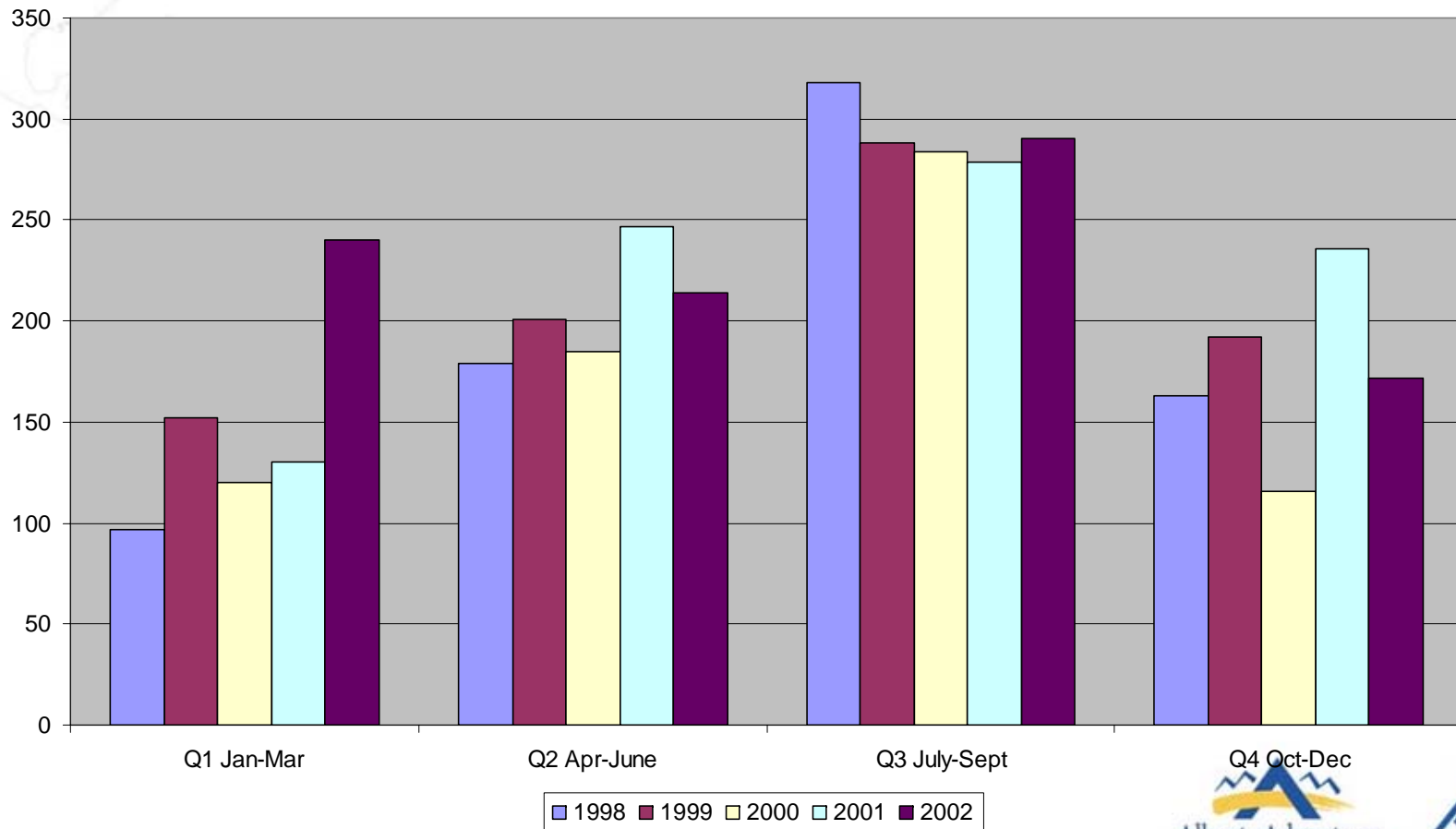
The chart shows the change in average length of stay (nights) in the Alberta North TDR





Quarter of Year when overnight trips are taken to the North TDR

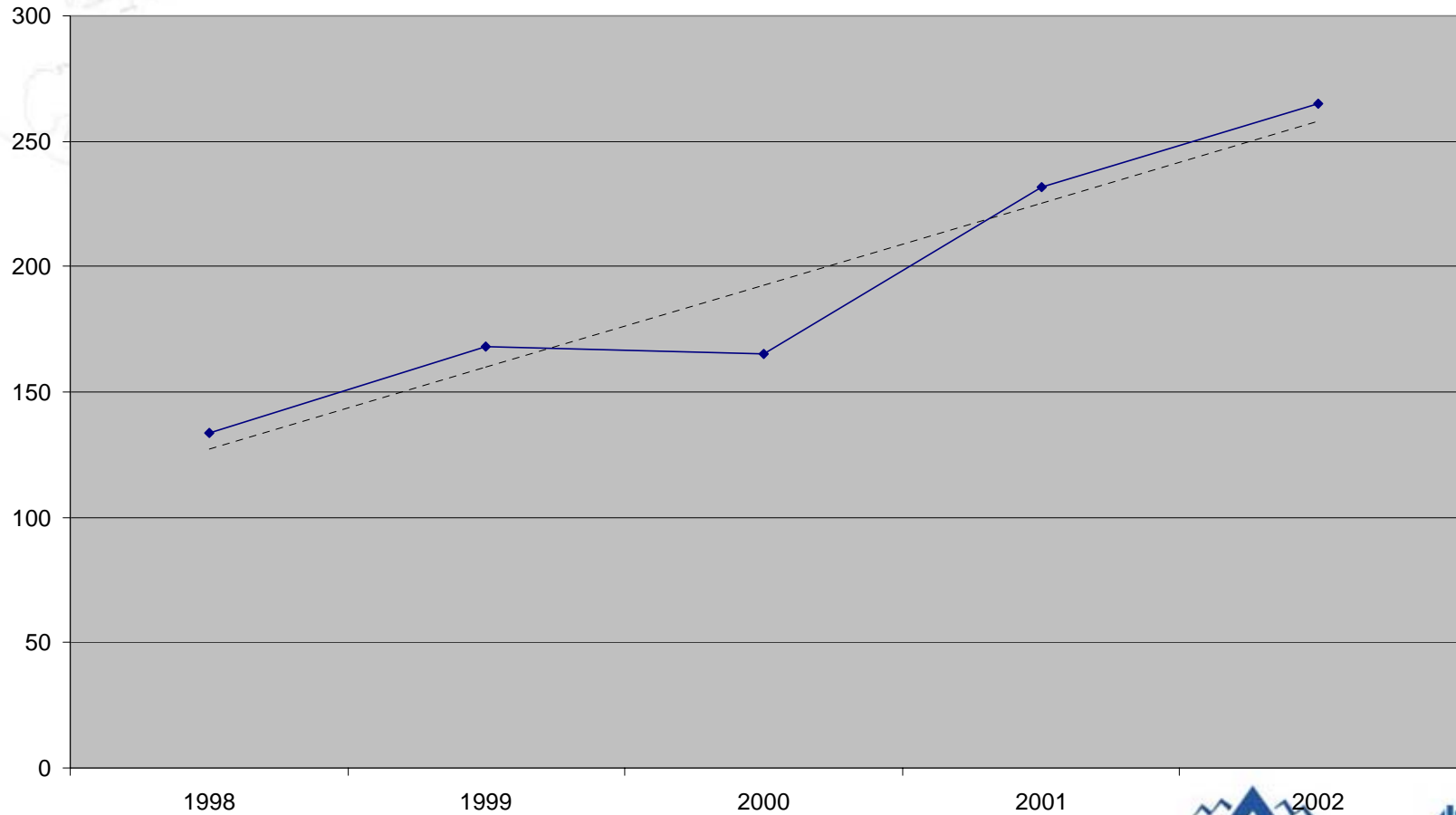
The chart shows the number of overnight trips in 000s by quarter of the year in which they are taken over the five year period.





Total Expenditures in Alberta North TDR

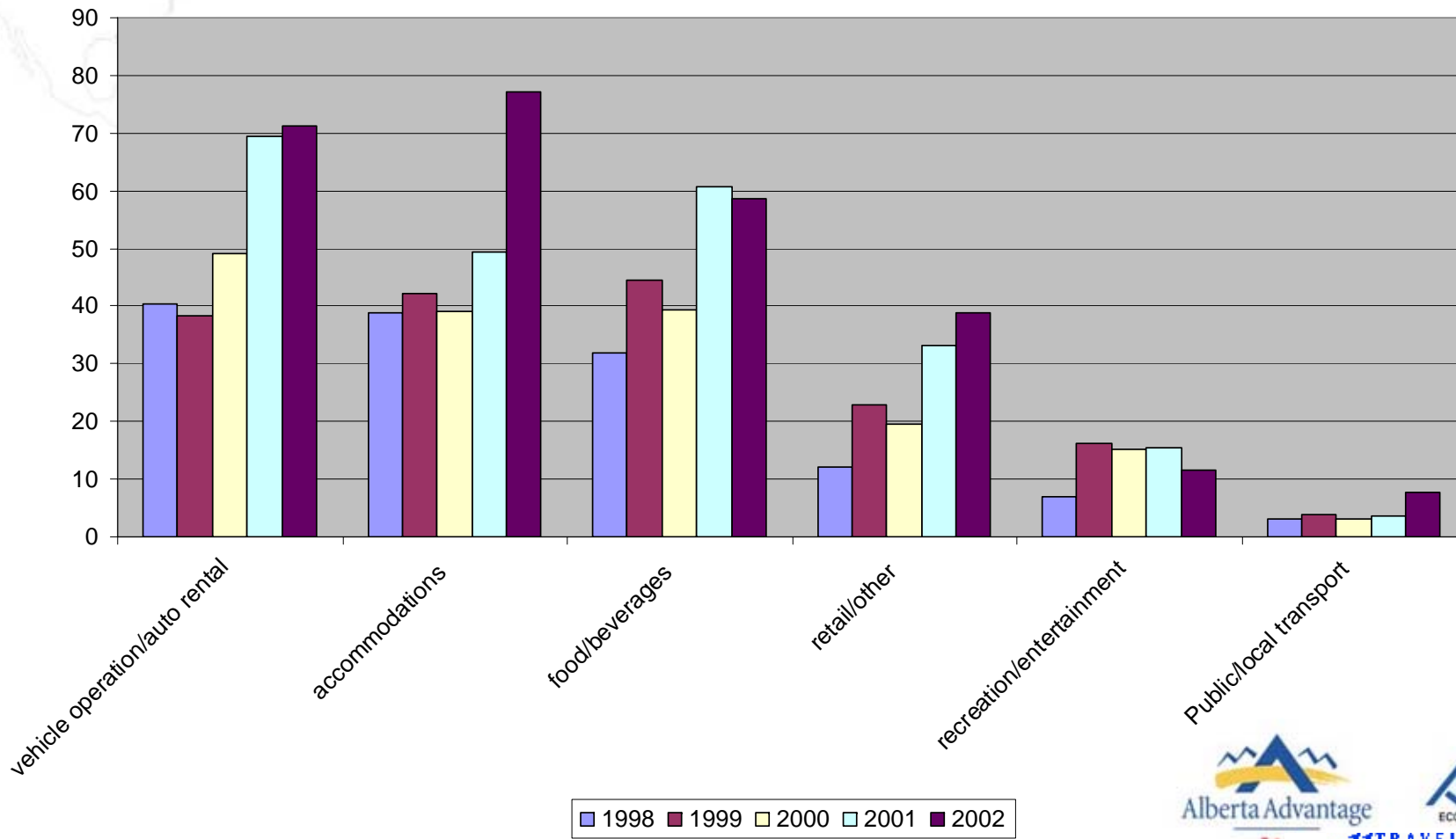
Total expenditures in Alberta North TDR have been rising over the past five years as indicated by the trend line (dotted line). Value is in \$ millions.





Total Expenditures in Alberta North TDR

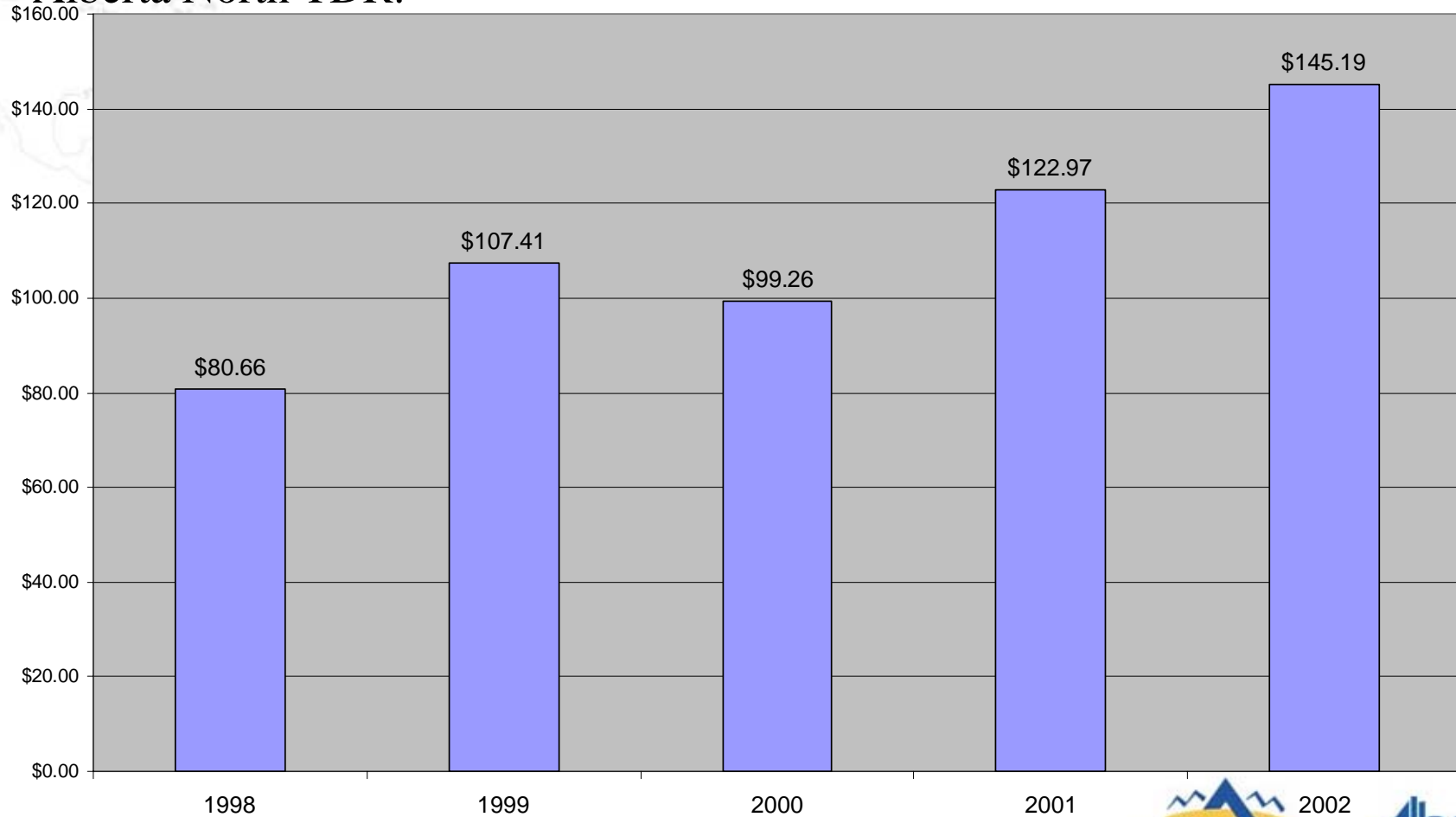
This chart indicates the trends in expenditures for each sector of tourism for the Alberta North TDR. Value is in \$ millions.





Average Spending per party per night (overnight visits)

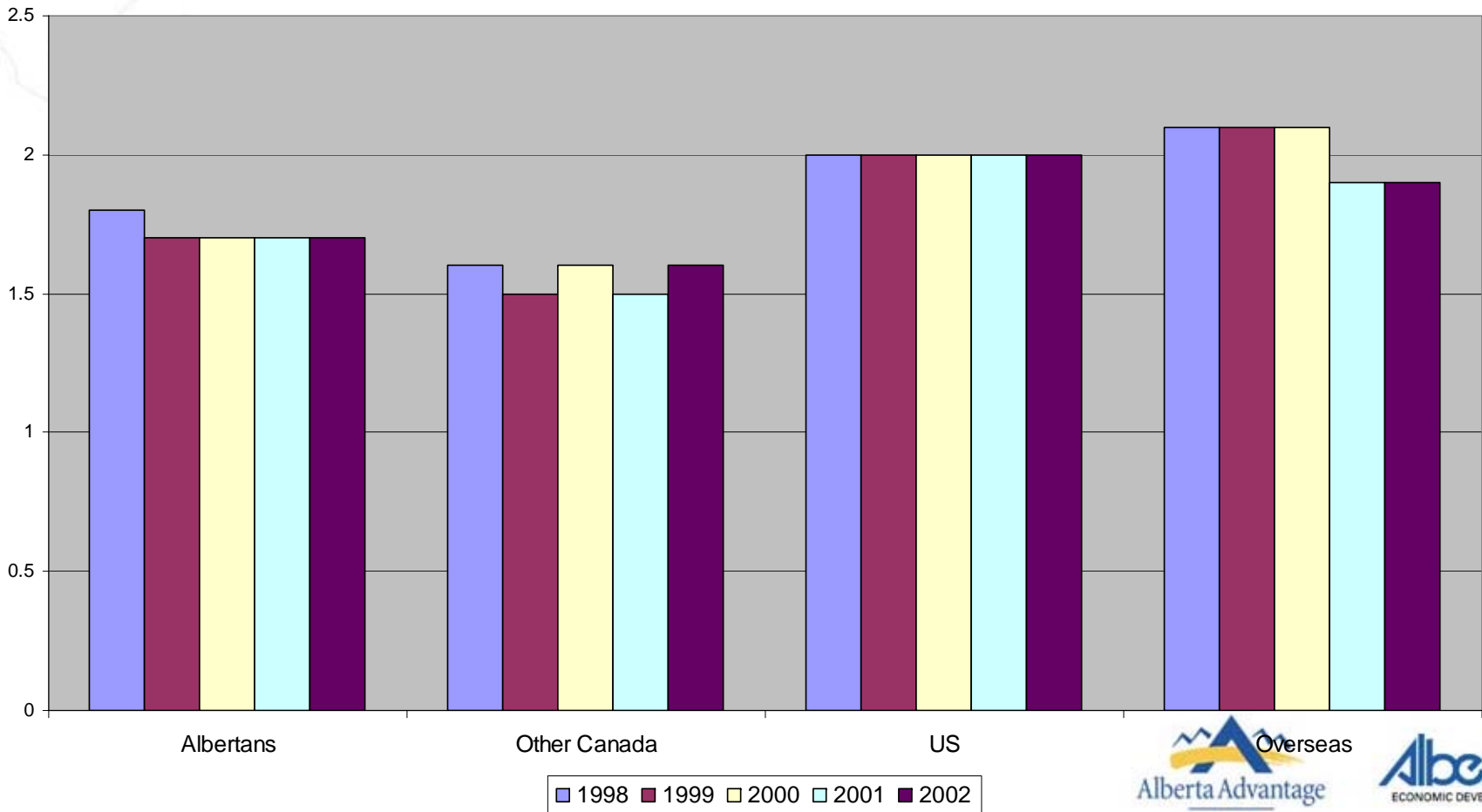
The chart shows the change in average spending per party per night in the Alberta North TDR.





Average Party Size (all Alberta Visitors)

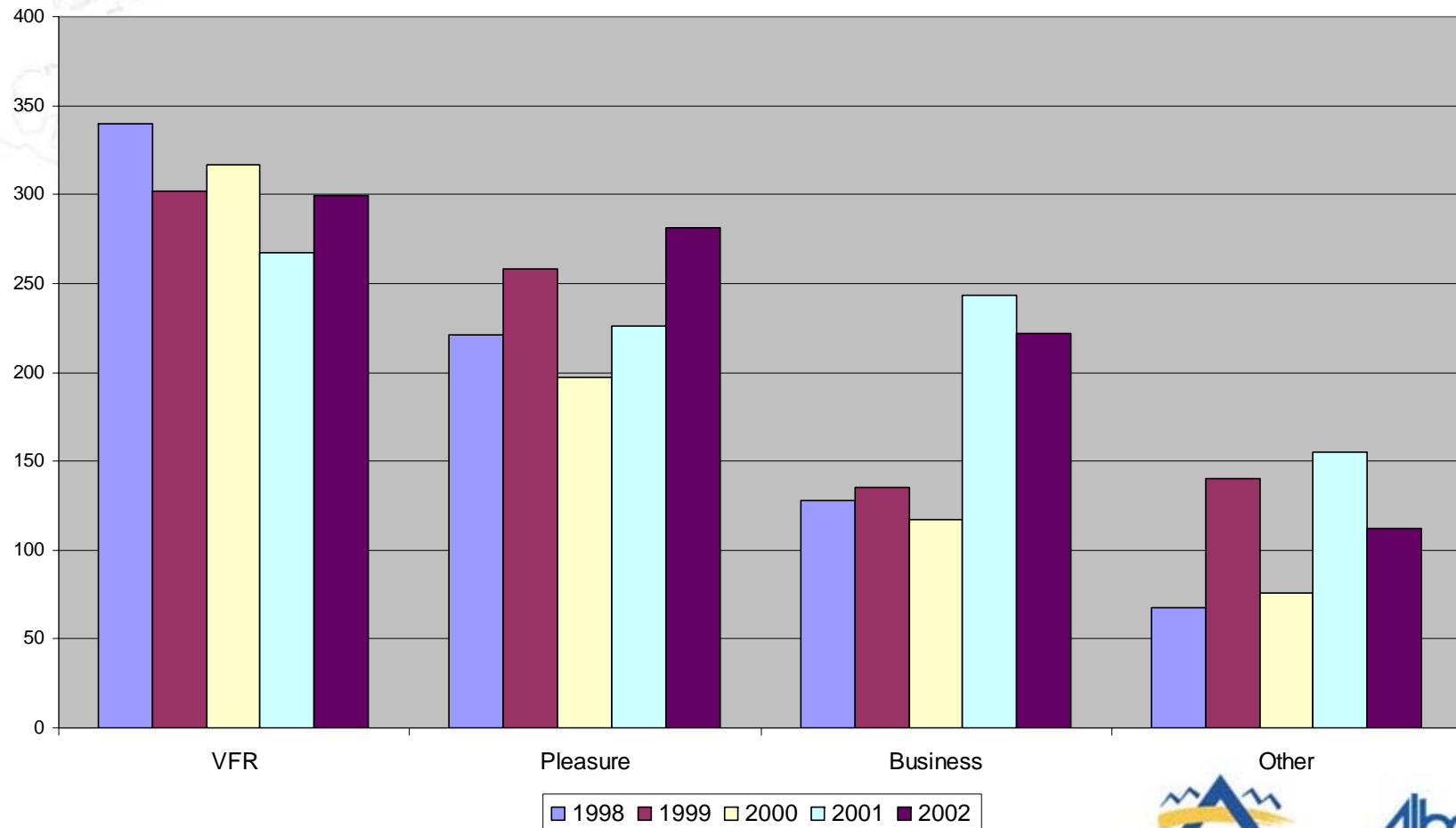
The chart shows the change in average party size for all visitor parties to and within Alberta by geo-market. There is no significant difference between party sizes to TDRs.





Purpose of overnight trip to North TDR (000s)

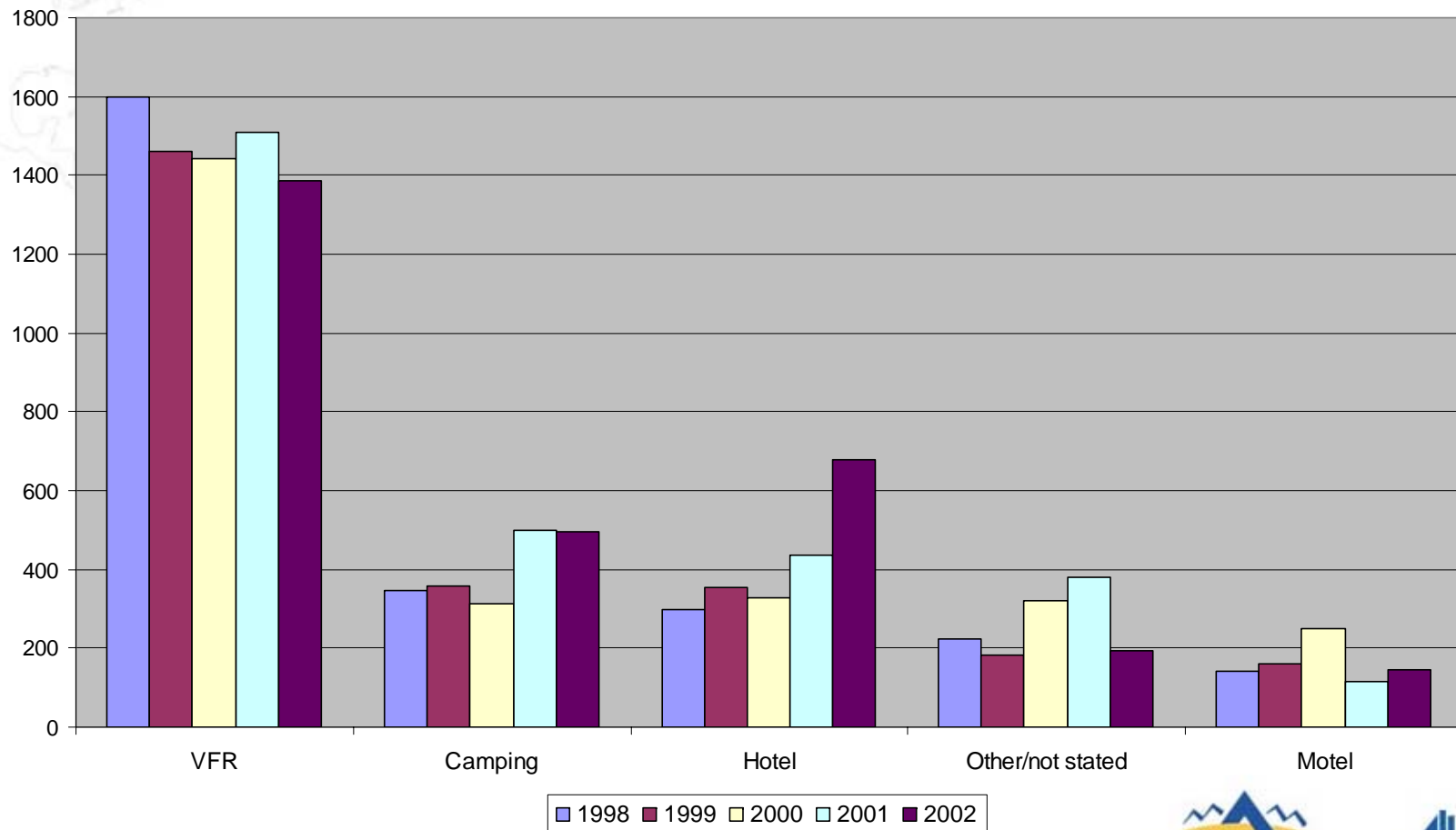
The chart shows the change over the five years for purpose of overnight trips to the TDR. Purpose of trip is indicated for overall trip (not only to the TDR).





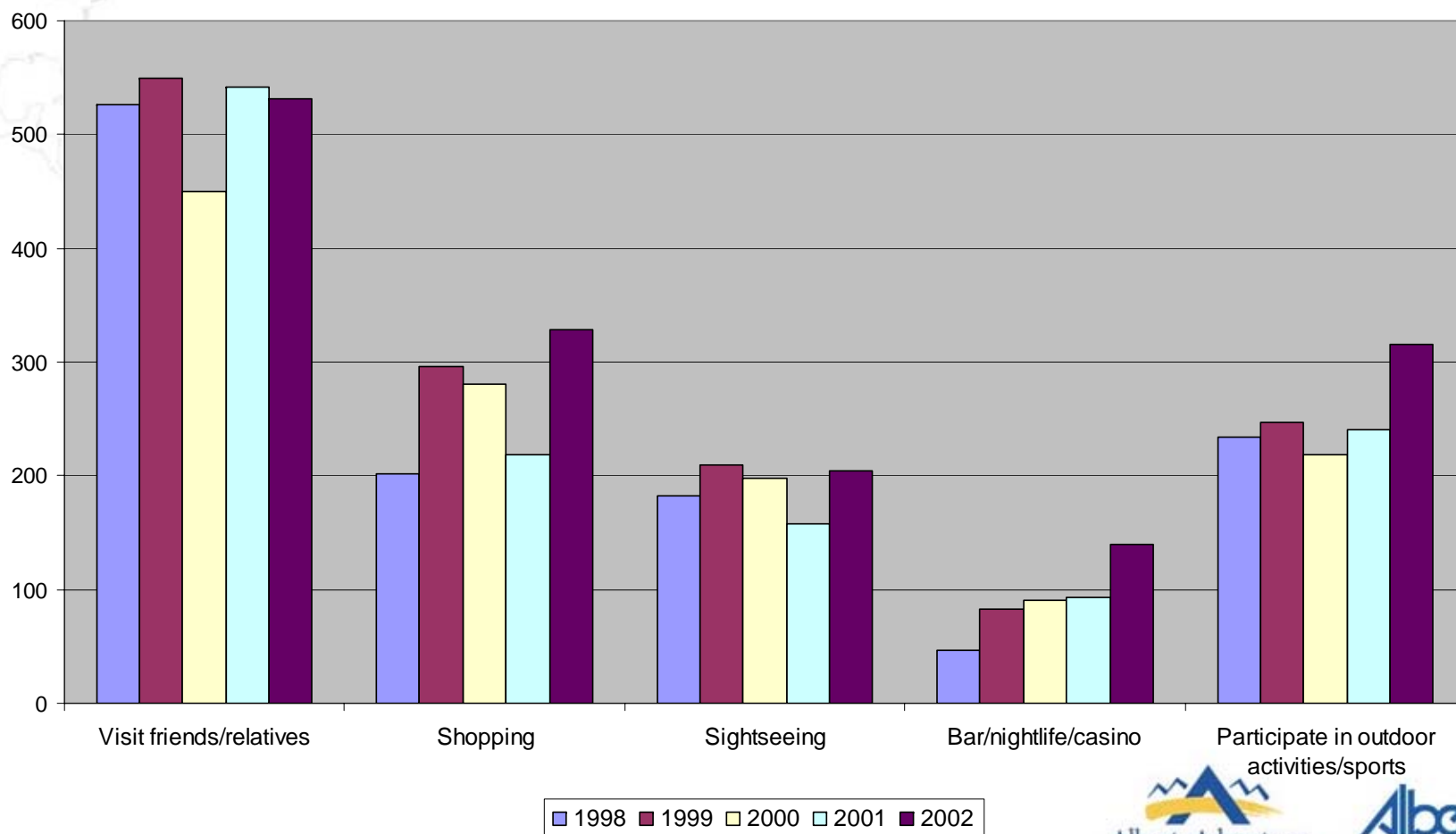
Type of Accommodation (person-nights)

The chart shows the different types of accommodations used in the TDR over the five year period as a percentage of the total. Value is in 000s.



Activities (overnight visits)

The chart shows the different activities engaged in during overnight visits for the five year period related to the TDR. Value is in 000s.





Pre-Summer Operator Study

- Southern and central Alberta operators generally experienced early-season occupancy increases above 2003. That was not necessarily the case for those in the north.
 - Grande Prairie reported growth of between five per cent and ten per cent in a more competitive marketplace.
 - Busy oil patch and forestry sectors contributed to growth with the caveat that crew camps were busier this year.
 - Survey responses from Fort McMurray indicated mixed success, but overall occupancy was below 2003.
 - Corporate and crew business was at a level with last year or slightly below.
- Tour business through northern Alberta appears weaker than in prior years. However, the number of senior tours and length of stays have increased. More movie and film-crew activity is also reported in Fort McMurray, a welcome addition.
- Operators enter the summer with some apprehension. Summer is historically a lull in the northern markets with crew business slowing.



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 Alberta North TDR

- The mean age of Alberta travellers coming to Alberta North is 46, 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.
- A slightly higher percentage of visitors are female (53%) than male.
- Mean household income for travellers visiting Alberta North is the lowest of all the travel destination regions at \$61,700.
- Of all Albertan leisure travellers to Alberta North over the next six months, 41% will be from the Edmonton region.
- Of all the travellers from Edmonton and area, 18% will head to Alberta North over the next six months.
- Travellers to Alberta North are planning to go to the other TDRs in relatively similar numbers.