



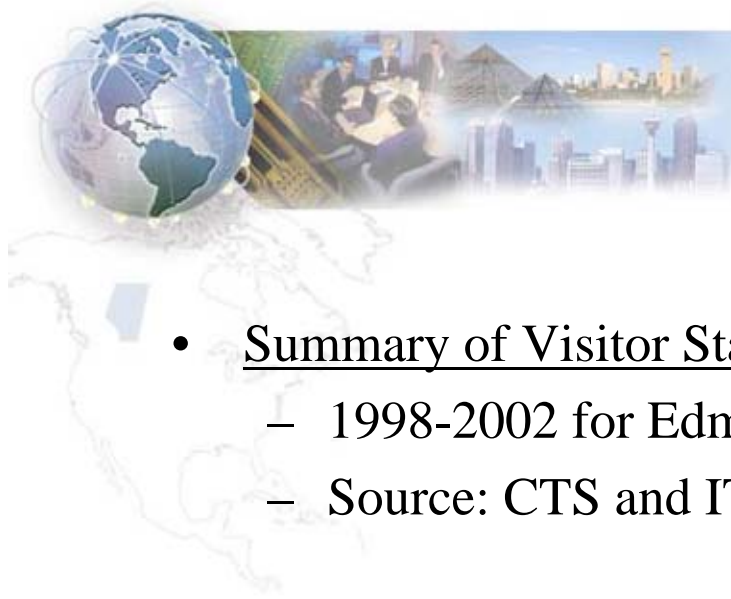
Edmonton and Area TDR

Visitor Statistics 1998-2002

Pre-Summer Operator
Survey 2004

Summer Travel Intentions
2004





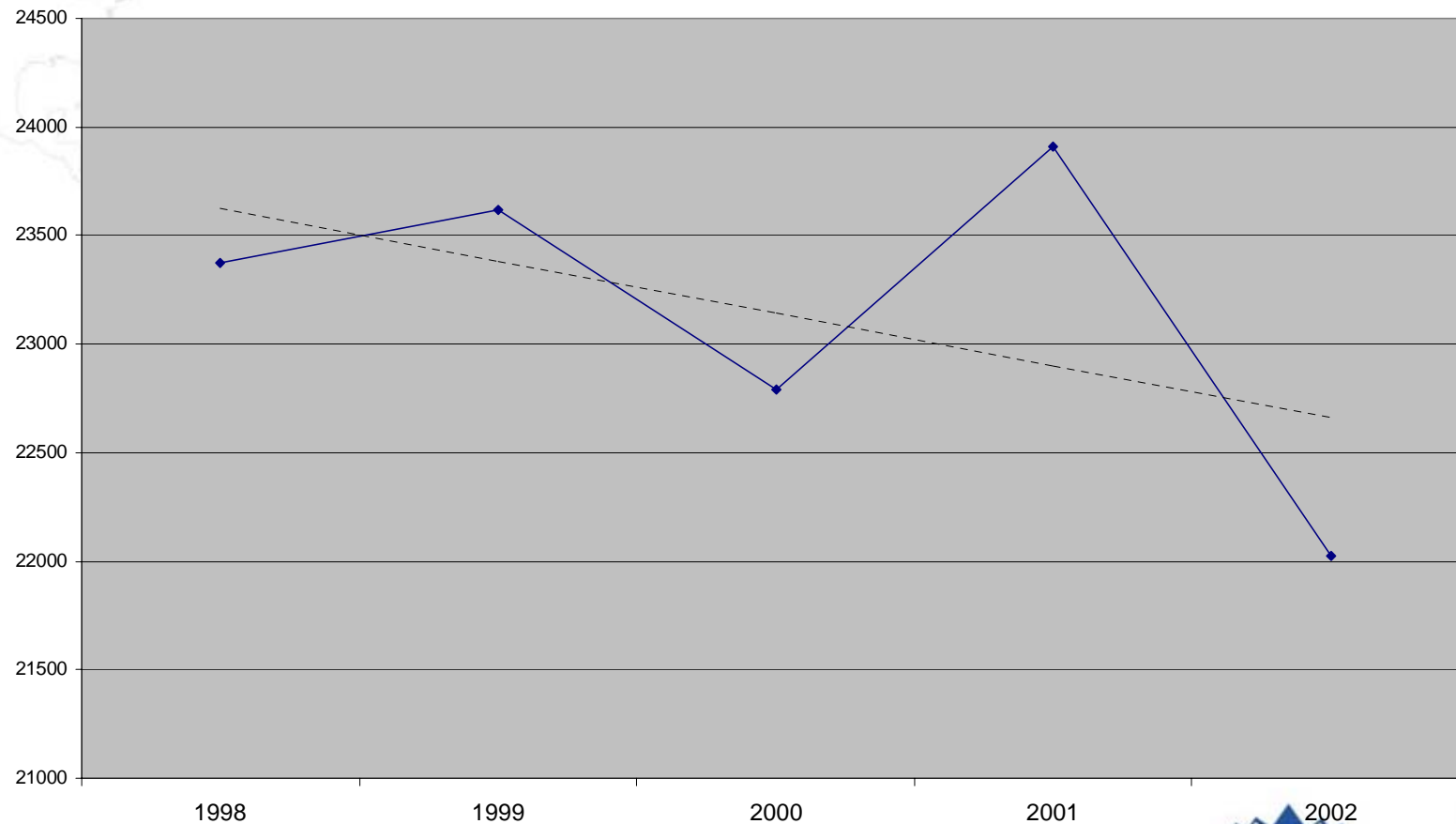
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- Summary of Visitor Statistics
 - 1998-2002 for Edmonton and Area TDR
 - Source: CTS and ITS, Statistics Canada
- Pre-Summer Operator Survey
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 - Summary of Edmonton and Area TDR results



Total Visits to Alberta (000s)

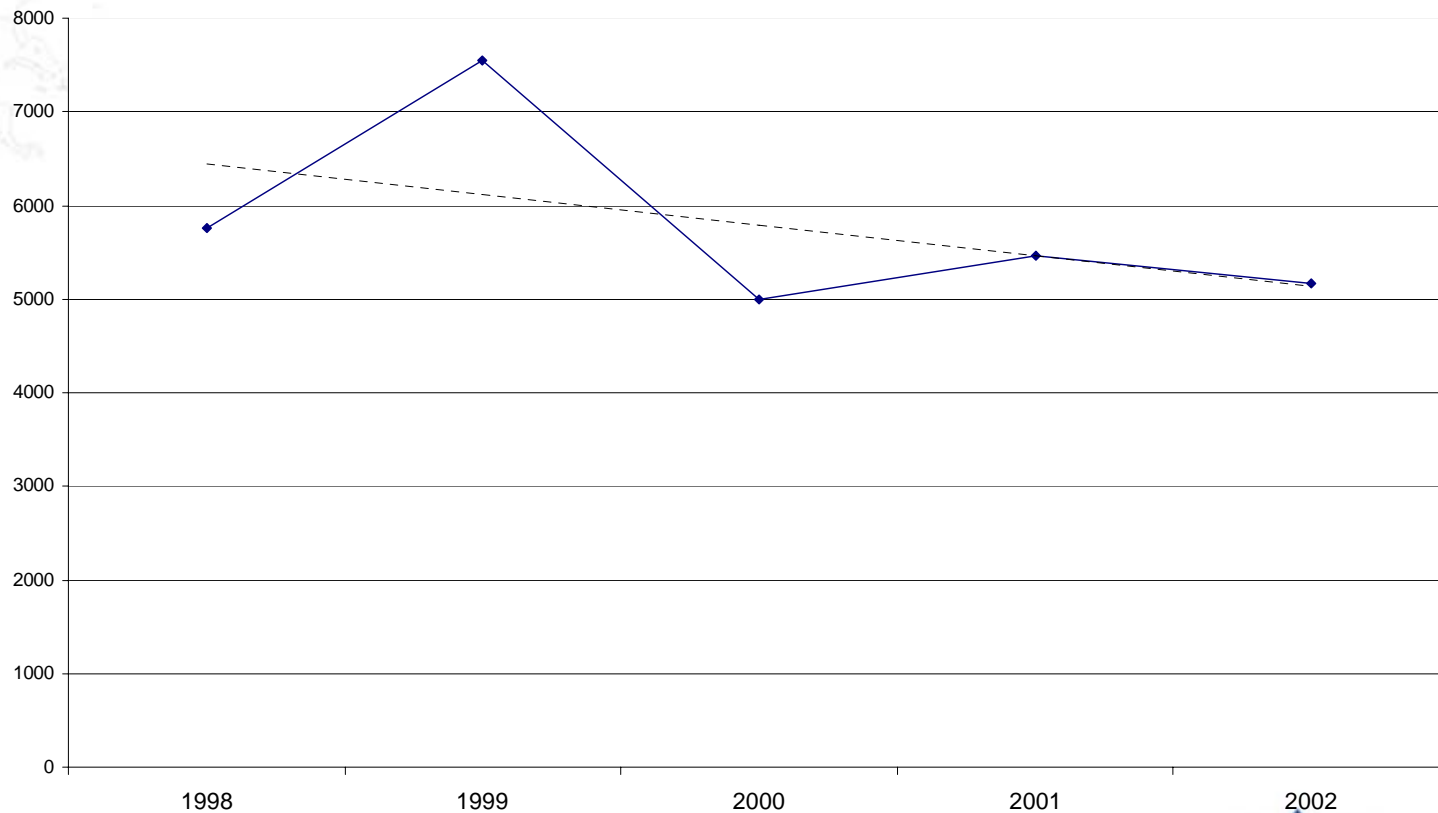
Total visits to Alberta have been declining over the past five years as indicated by the trend line (dotted line).





Total Visits to Edmonton and Area TDR

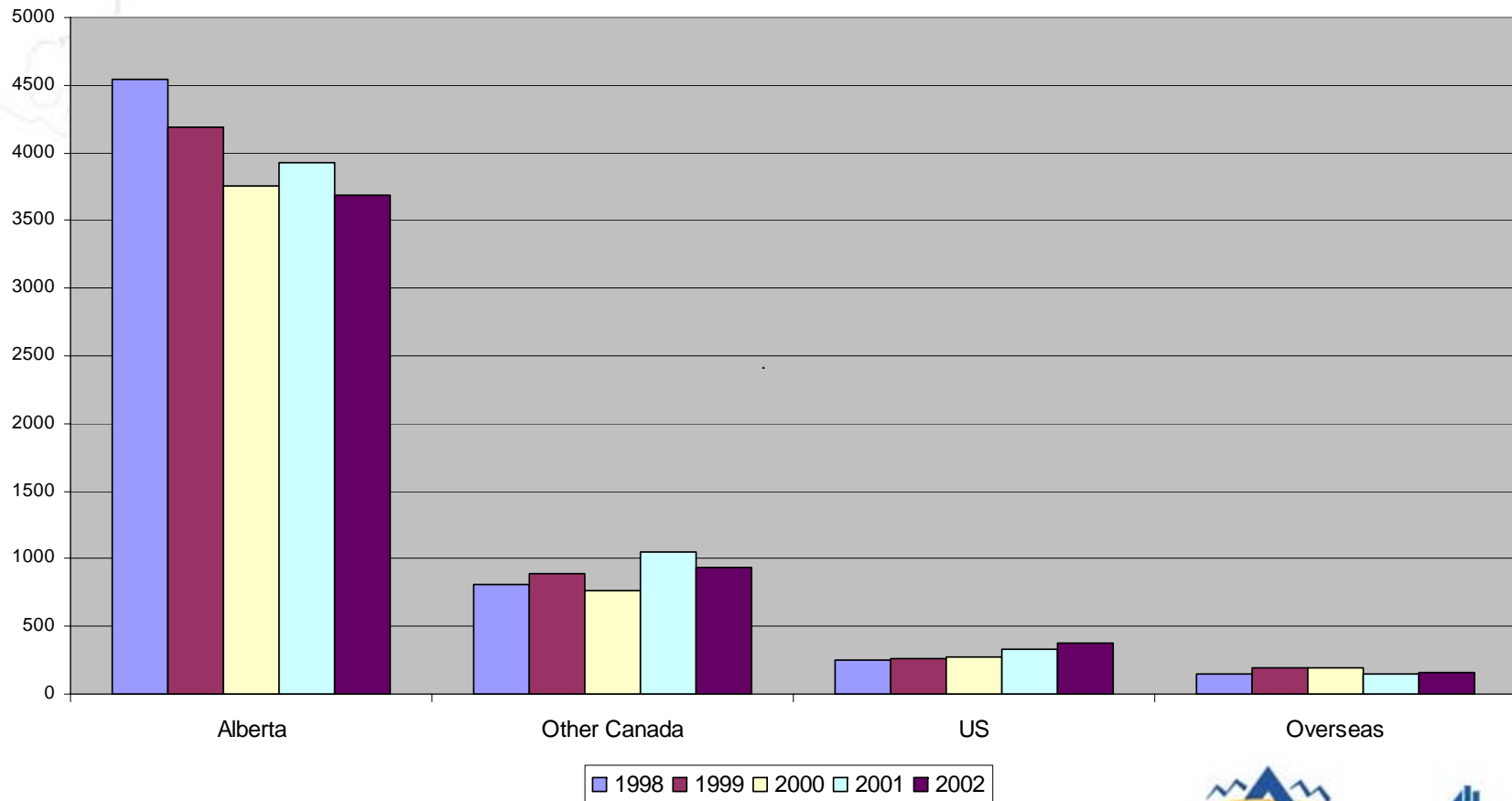
Total visits to Edmonton and Area TDR have been declining over the past five years as indicated by the trend line (dotted line). Numbers are in 000s.





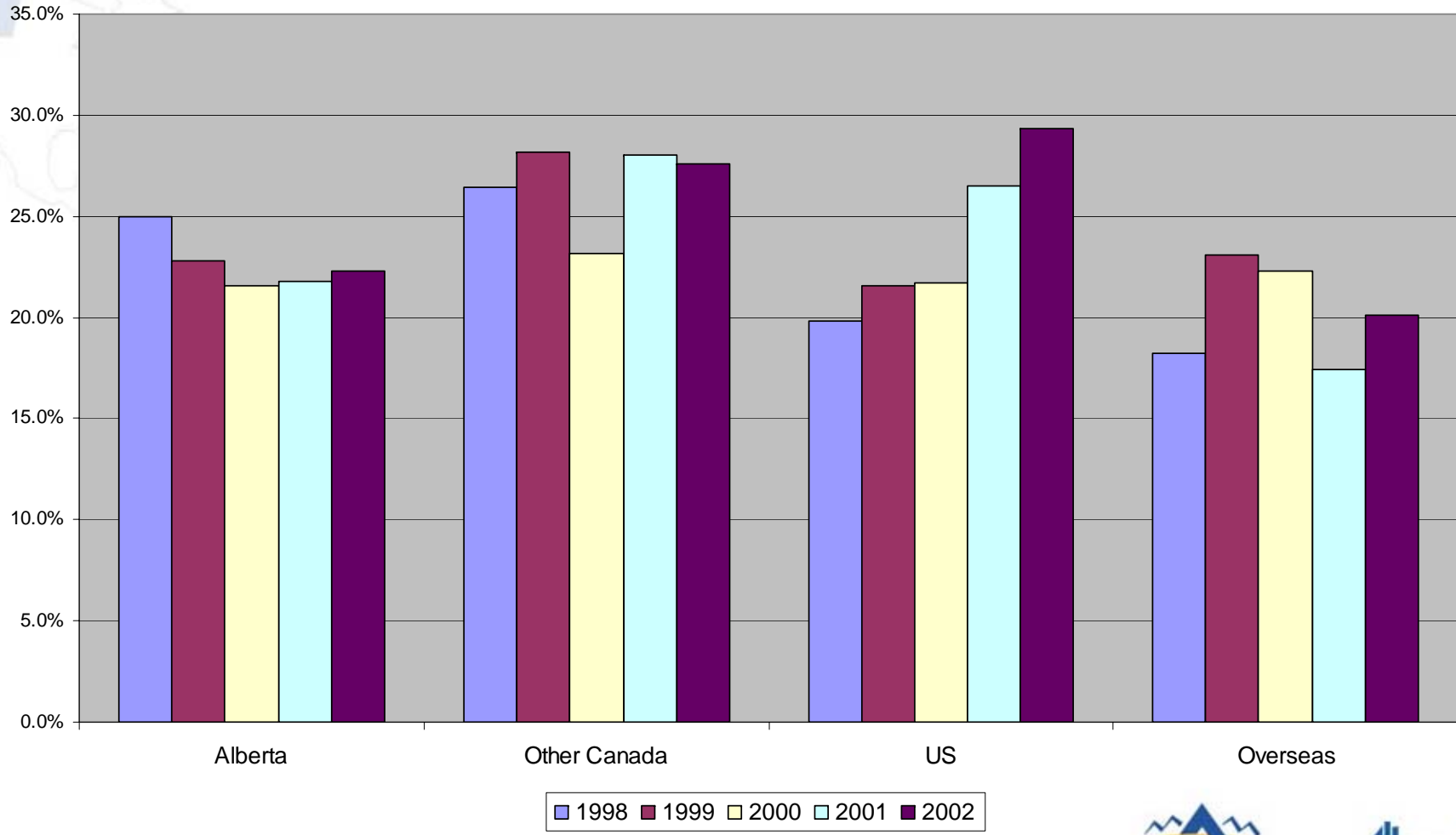
Total Visits (000s) to Edmonton and Area TDR by geo-region

Over the five year period, Albertans have been travelling less to the Edmonton and Area TDR, while visitors from the US have been increasing slightly.





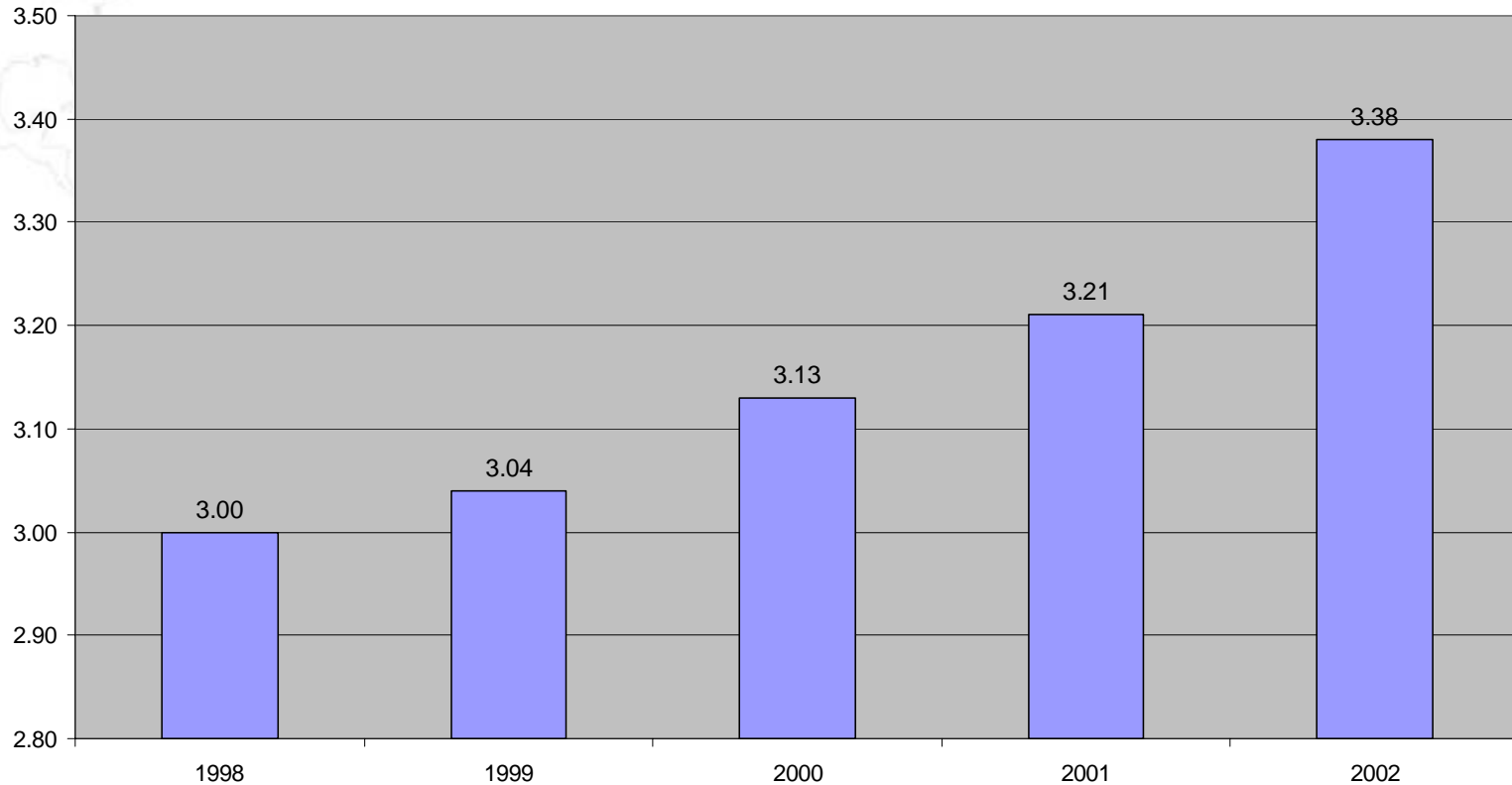
Total Visits (000s) to Edmonton and Area TDR by geo-region (% of total visits to Alberta)





Average Length of Stay (overnight visits)

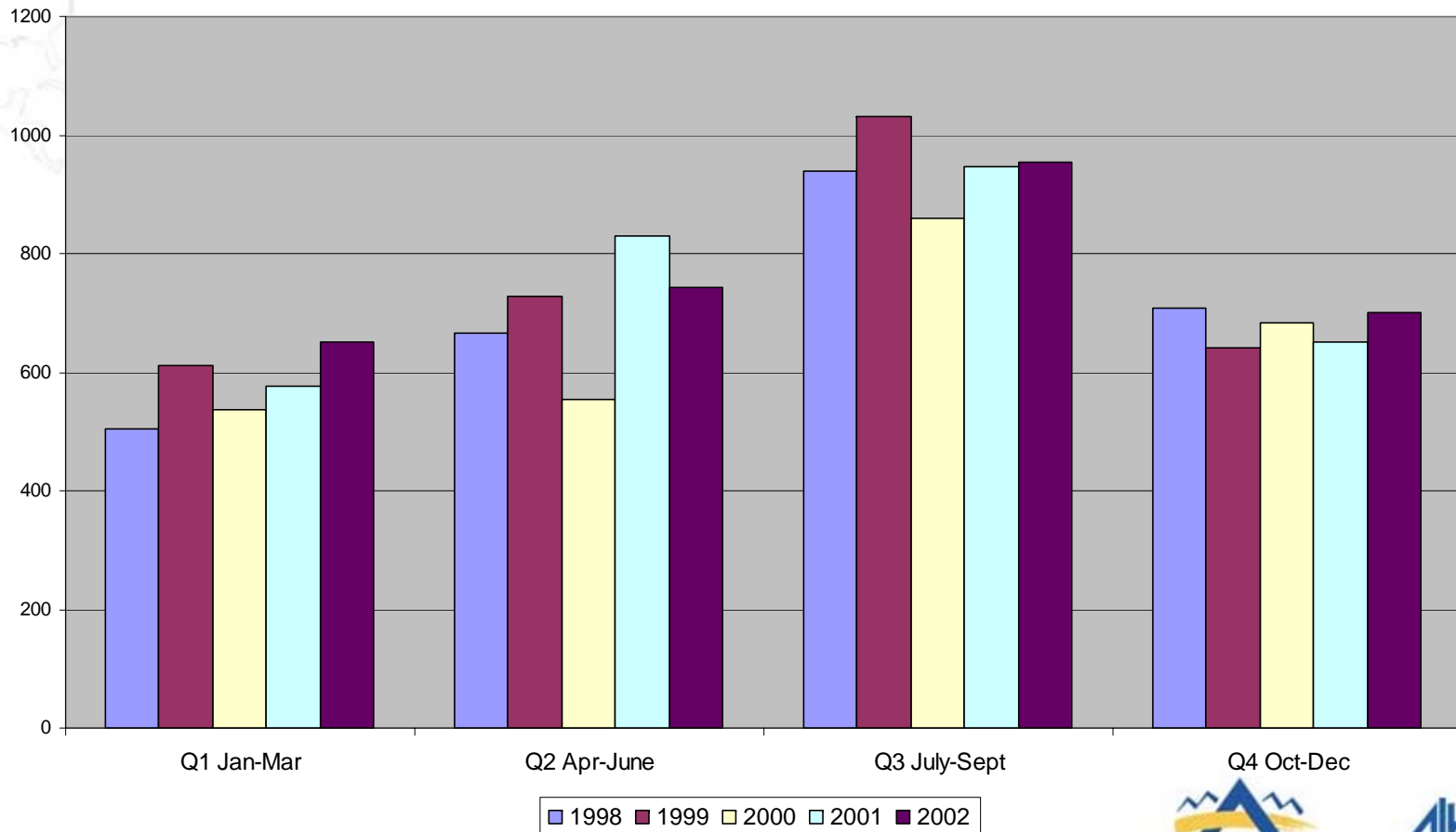
The chart shows the change in average length of stay in the Edmonton and Area TDR. The average length of stay has been increasing over the five year period.





Quarter of Year when overnight trips are taken to the Edmonton and Area TDR

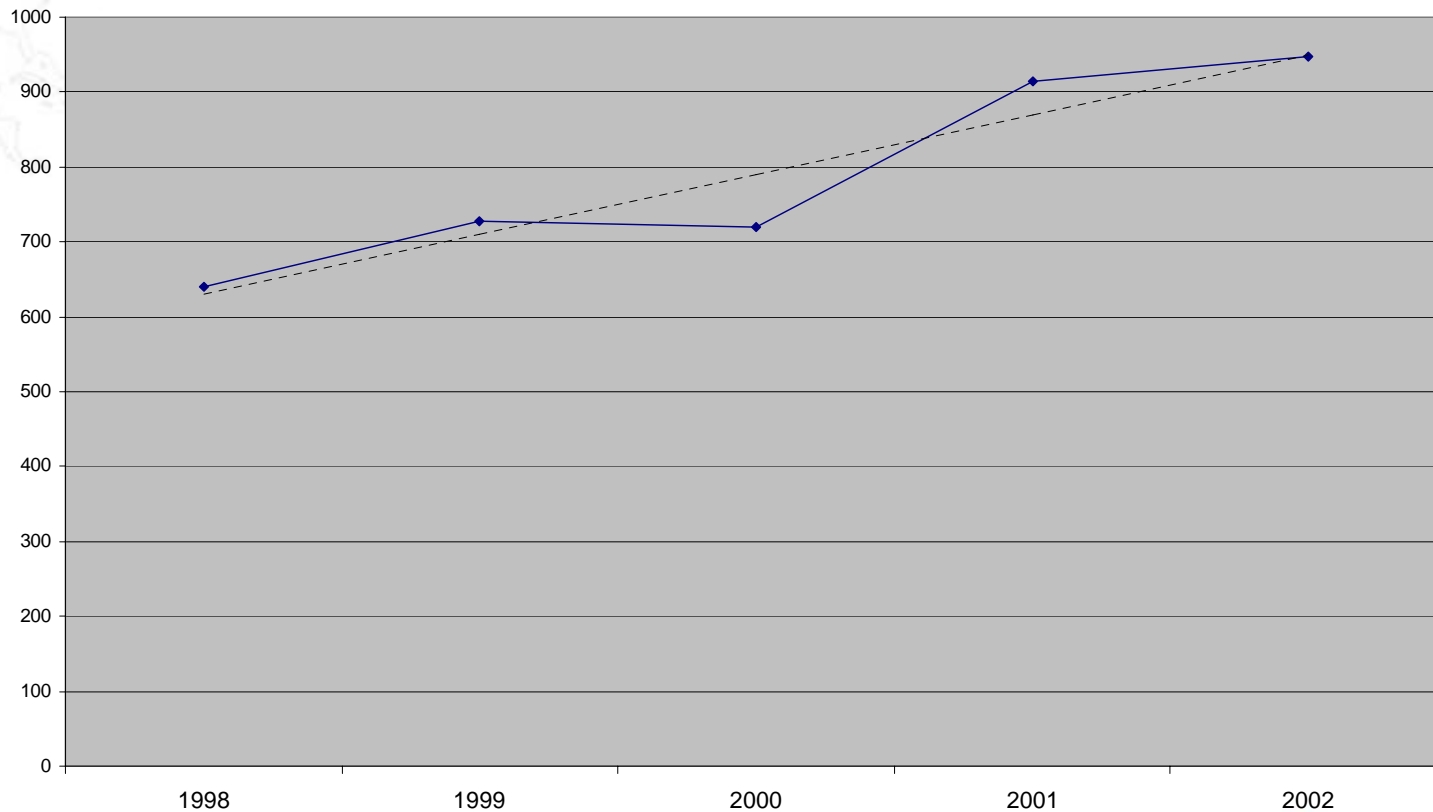
The chart shows the number of overnight trips in 000s by quarter of the year in which they are taken over the five year period.





Total Expenditures in Edmonton and Area TDR

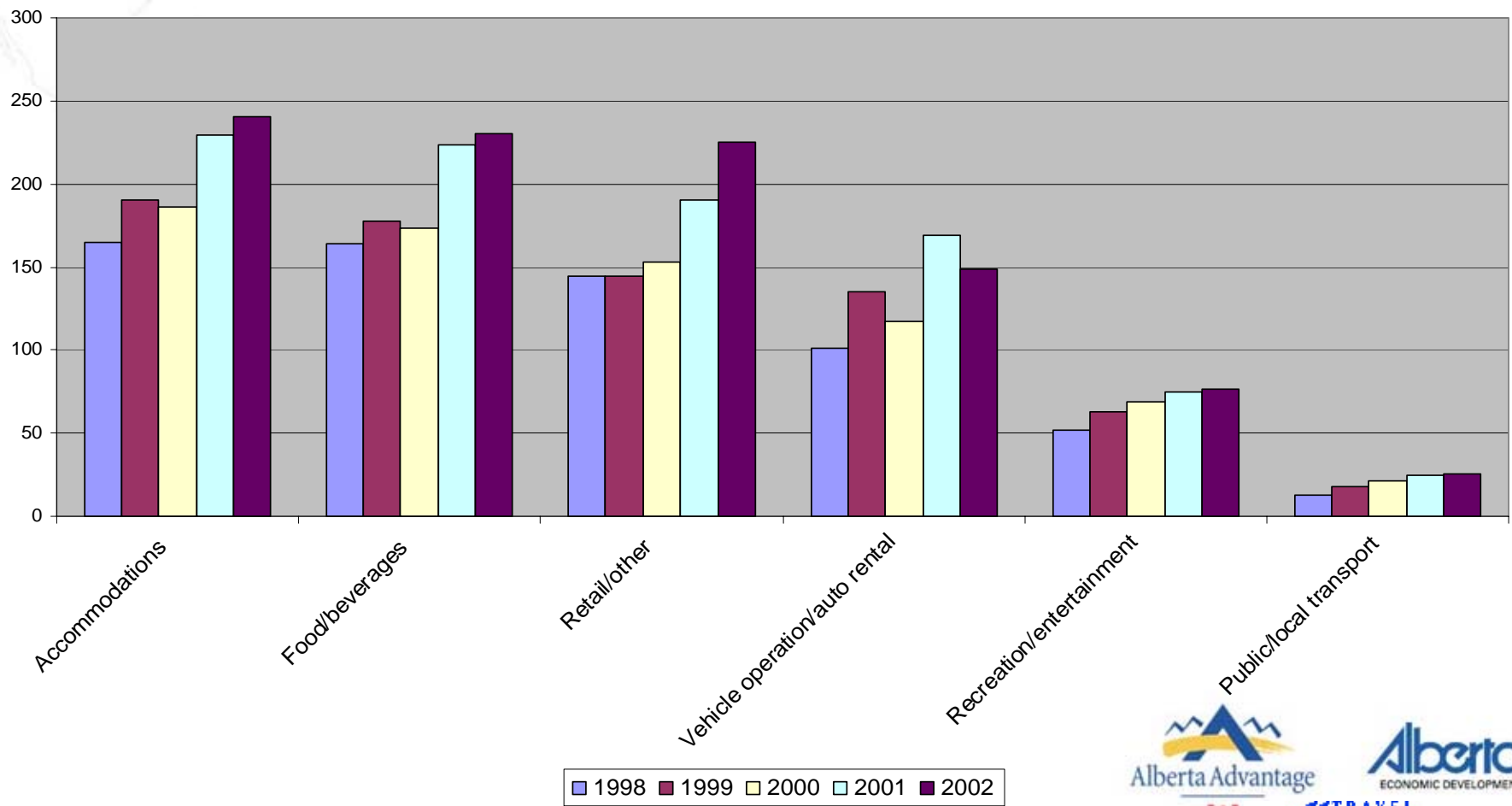
Total expenditures in Edmonton and Area TDR have been rising over the past five years as indicated by the trend line (dotted line). Value is in \$ millions.





Total Expenditures in Edmonton and Area TDR

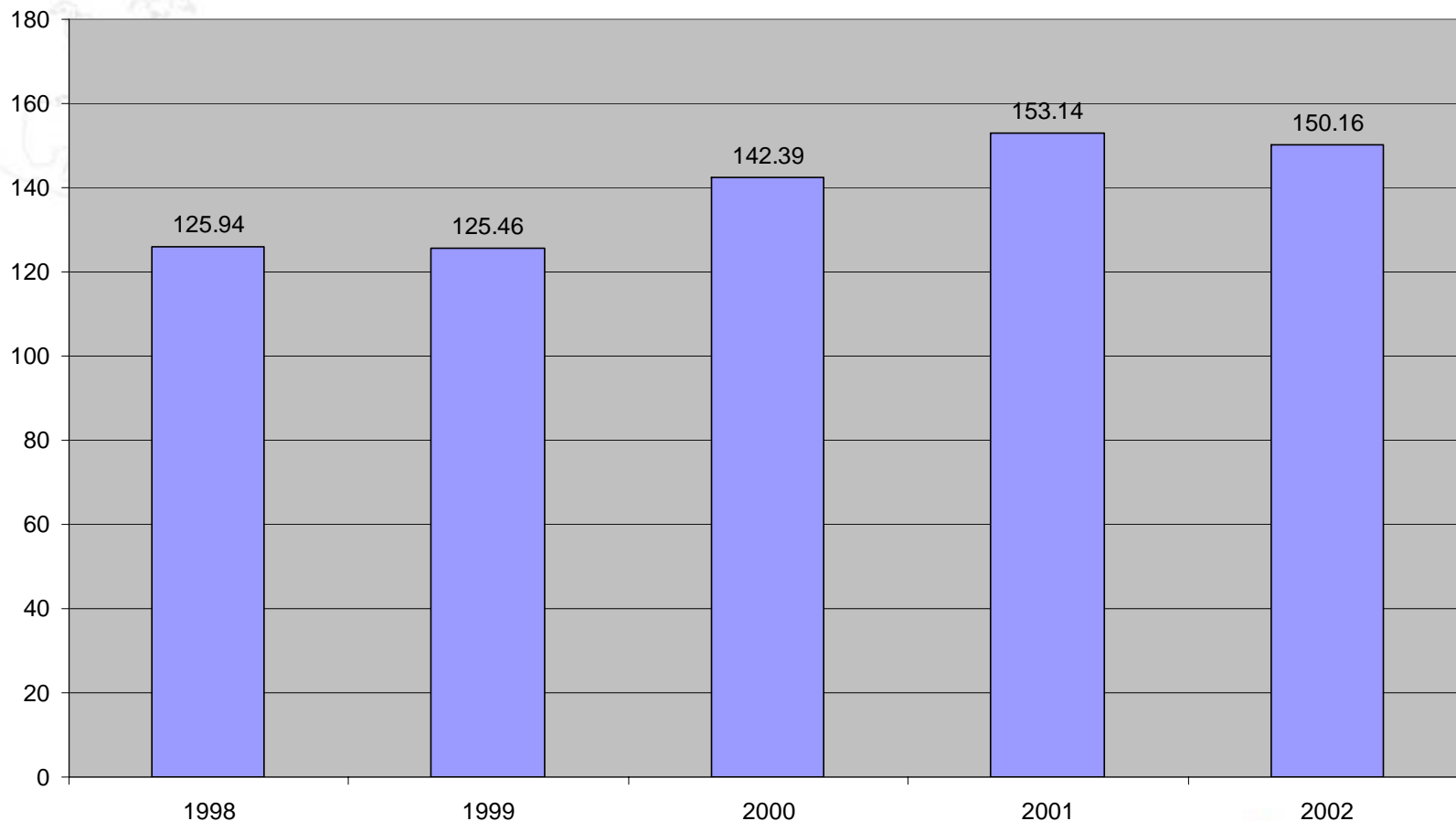
This chart indicates the trends in expenditures for each sector of tourism for the Edmonton and Area TDR. Value is in \$ millions.





Average spending per party per night (overnight visits)

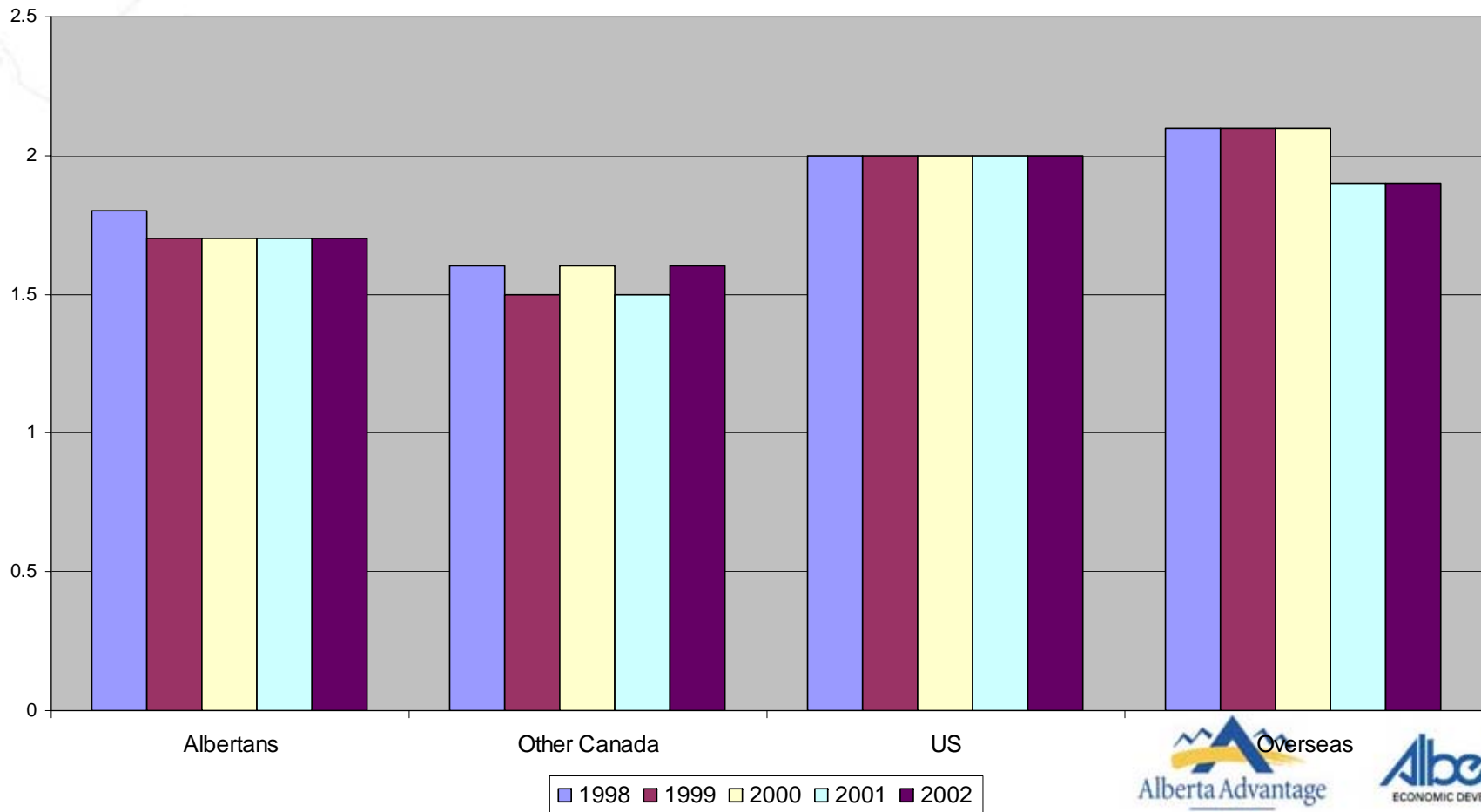
The chart shows the change in average spending per party per night in the Edmonton TD]





Average Party Size (all Alberta Visitors)

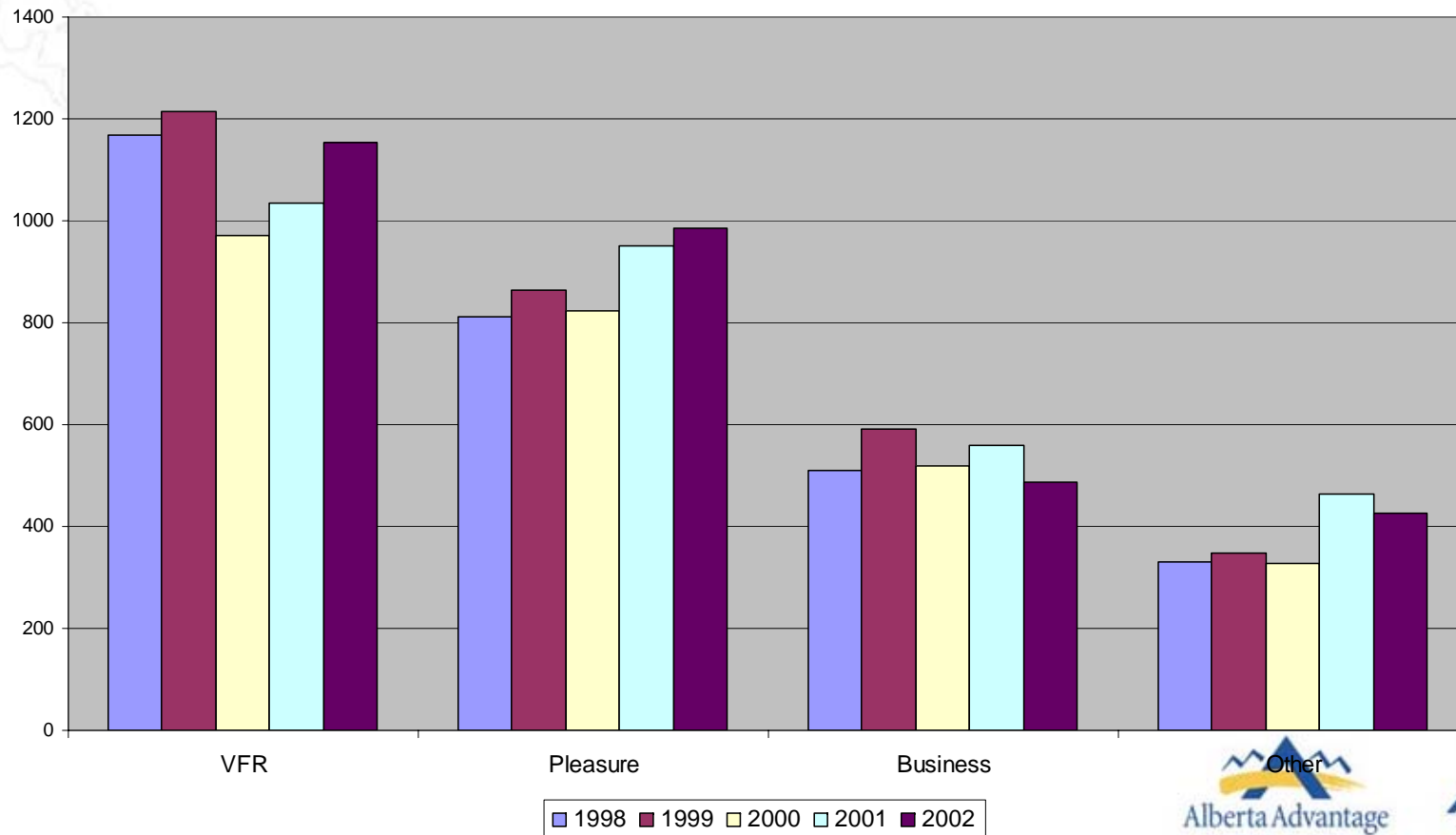
The chart shows the change in average party size for all visitor parties to and within Alberta by geo-market. There is no significant difference between party sizes to TDRs.





Purpose of overnight trip to Edmonton and Area TDR (000s)

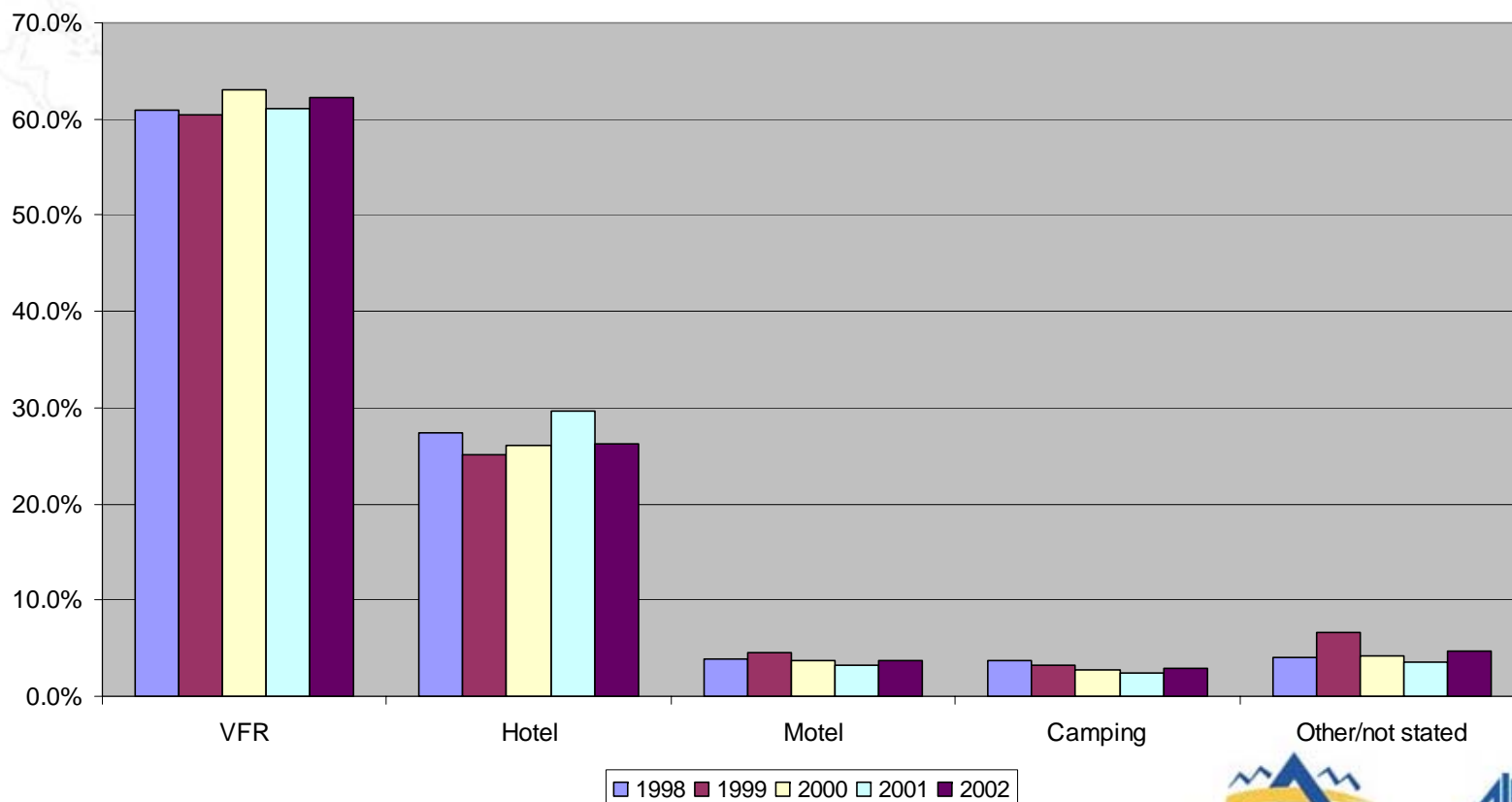
The chart shows the change over the five years for purpose of overnight trips to the TDR. Pleasure trips have increased, while business trips have remained relatively constant. Purpose of trip is indicated for the trip overall and not only the trip to TDR.





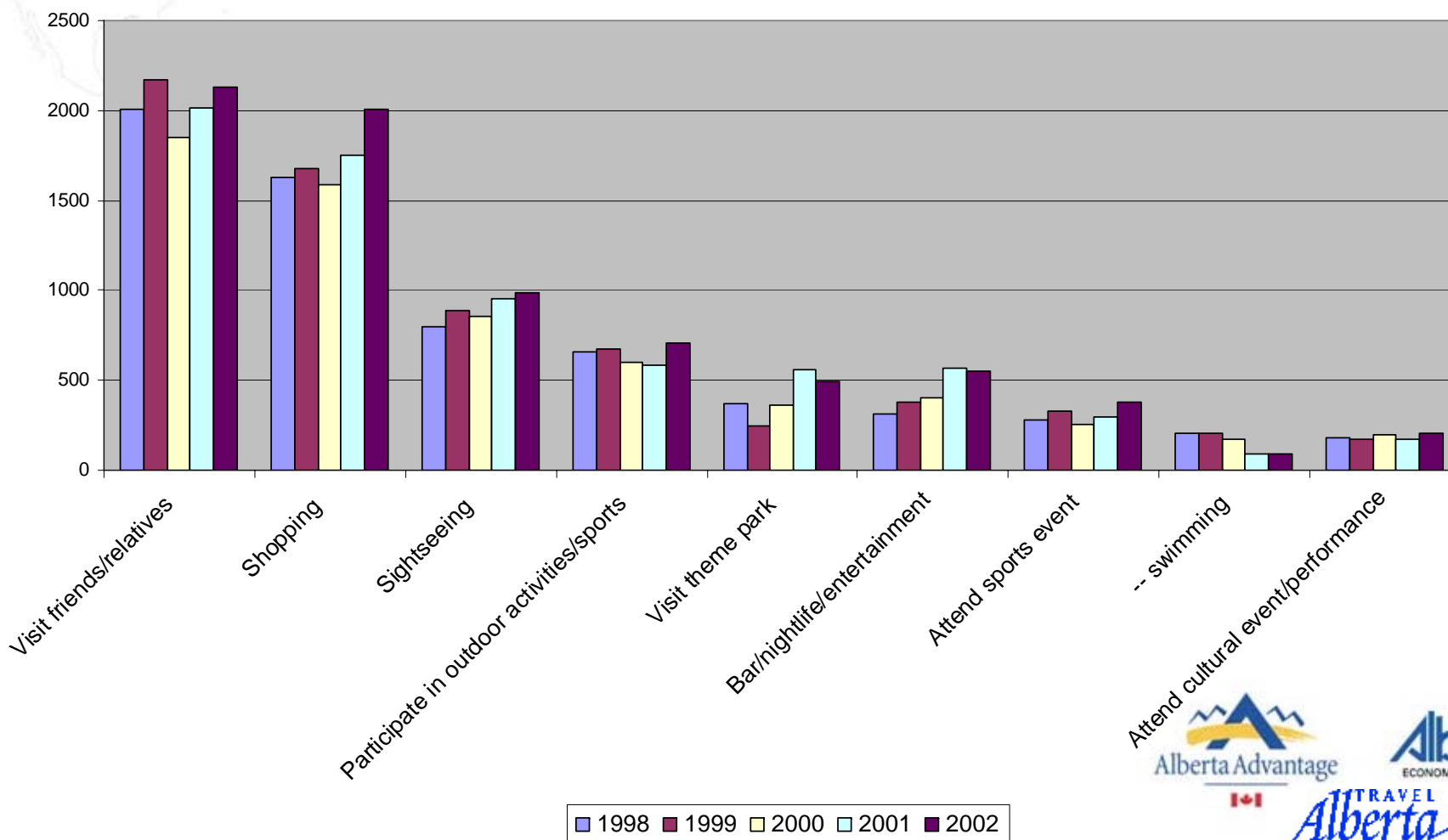
Type of Accommodation (person-nights)

The chart shows the different types of accommodations used in the TDR over the five year period as a percentage of the total. E.g. In 1998, a little over 60% of person-nights were spent with VFR (visiting friends and relatives).



Activities (overnight visits)

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





Pre-Summer Operator Study

- Following a disappointing 2003, Edmonton began 2004 on a generally optimistic note.
- First-quarter results started slowly; occupancy during winter and early spring was similar to last year.
- Noticeable strengthening of corporate business, an upswing in regional leisure traffic and good sports team tournament business was reported.
- Lower anticipated room demand found most venues holding rates at near 2003 levels.
 - Edmonton hotels approach the 2004 summer season with expectations of a better year, but perhaps not the degree of growth hoped for.
 - All anticipate small occupancy increases over 2003. May, July and August bookings are up. June is questionable, with bookings up slightly or similar to last year.



Pre-Summer Operator Study

- The regional individual leisure market will once again be the leader.
- Tour business is expected to be below 2003 with the bright spot being senior tour groups.
- Corporate, wedding and tournament sports business will be strengths over the summer months.
- Edmonton is traditionally the benefactor of a strong regional rural market but the fear is the current agricultural situation and lingering effects of BSE may negatively impact occupancy.
- Edmonton's summer festival market continues to play a key role in the success of hotel occupancy and revenue statistics.
- Benefits from Edmonton's 2004 anniversary are expected to be positive, but so far nothing has been identified. Demand for 2005 Alberta centenary events, such as the Masters Games and the Brier, are already being booked in Edmonton hotels.



Pre-Summer Operator Study

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- Indication of a stronger American market is worthy of note, although return of Asian and European visitors to Edmonton is not evident.
 - Some concern is being expressed that Edmonton is not effectively identifying target markets and serving them.
 - Concerned west-end hotel properties identify the surplus of room inventory in that part of the city, with more coming on stream.
 - Overall, Edmonton operators are approaching the season on a positive note.



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

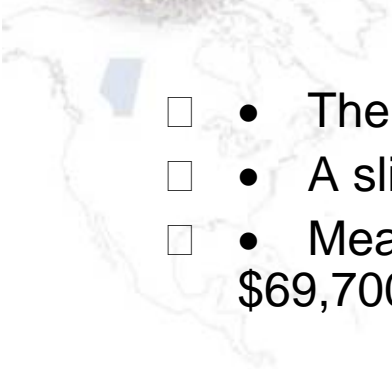
- While one-quarter of Albertan travelers take trips with only last minute planning or no planning at all, the vast majority of trips are planned between 2 weeks and 3 months in advance.
- The top information resources used to plan leisure trips include: the Internet (40%), word-of-mouth (34%), previous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

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- The mean age of Alberta travelers coming to Edmonton is 44.
 - A slightly higher percentage of visitors are female (54%) than male.
 - Mean household income for travelers visiting Edmonton and area is \$69,700.
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- 30% of all Albertan travelers plan to travel to the Edmonton area at least once in the next 6 months.
 - The overall composition of Albertan leisure travelers to Edmonton over the next six months, 44% will be from Calgary, 29% from Central, and 12% from the North.
 - More than 50% of travelers from each of Alberta Central (51%) and Alberta North (59%) plan to travel to Edmonton and area from May 1 - October 31.
 - The largest proportion of travelers to the Edmonton region are also going to the Rockies, and the fewest are also going to Alberta North in the next 6 months.