



Canadian Rockies TDR

Visitor Statistics 1998-2002

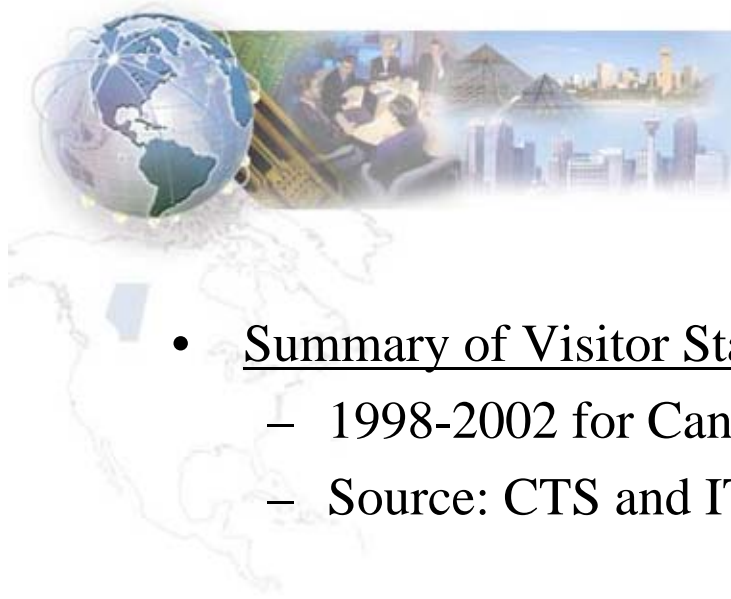
Pre-Summer Operator
Survey 2004

Summer Travel Intentions
2004



...CANADIAN ROCKIES





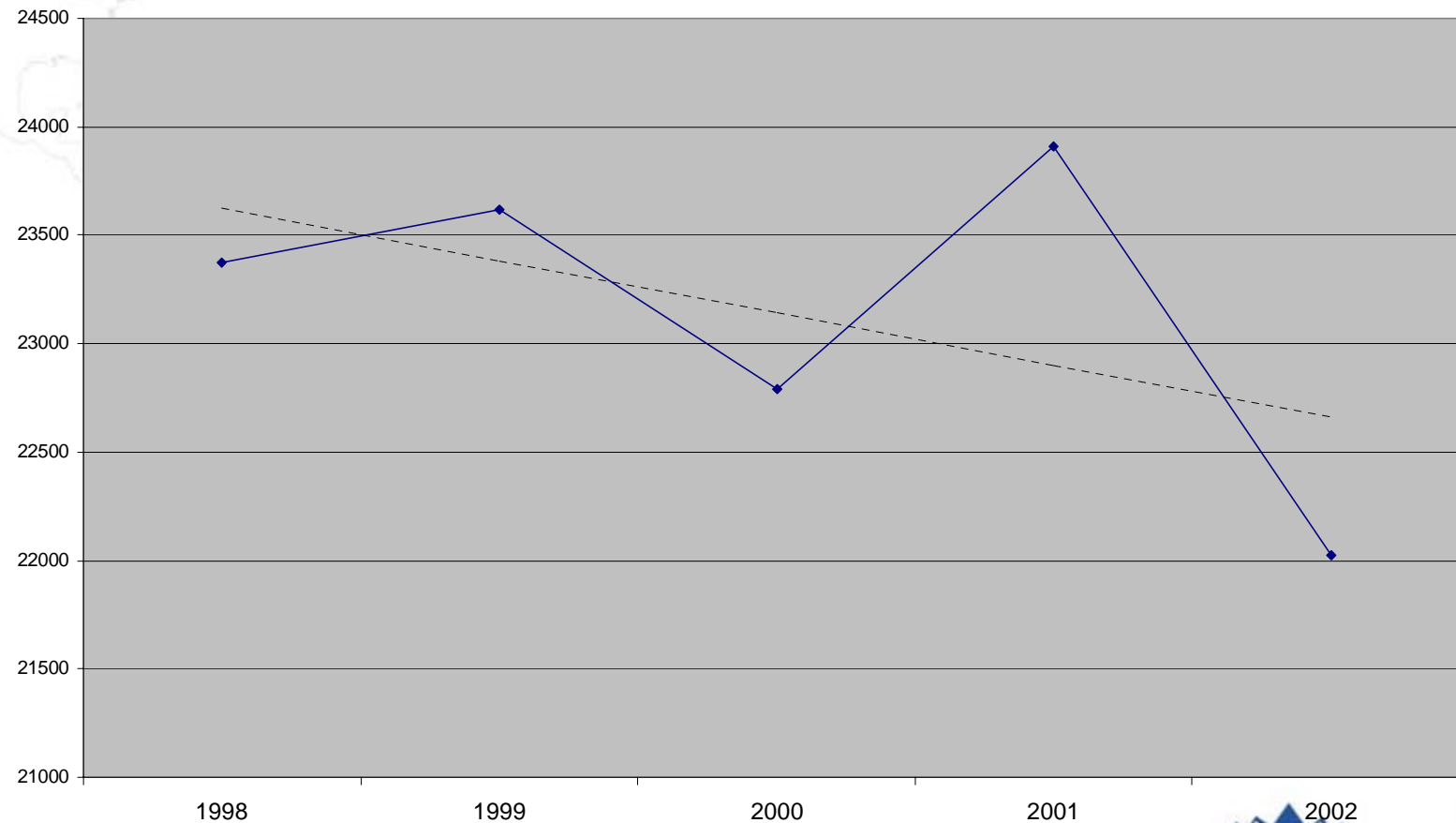
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 - Summary of Rockies TDR results



Total Visits to Alberta (000s)

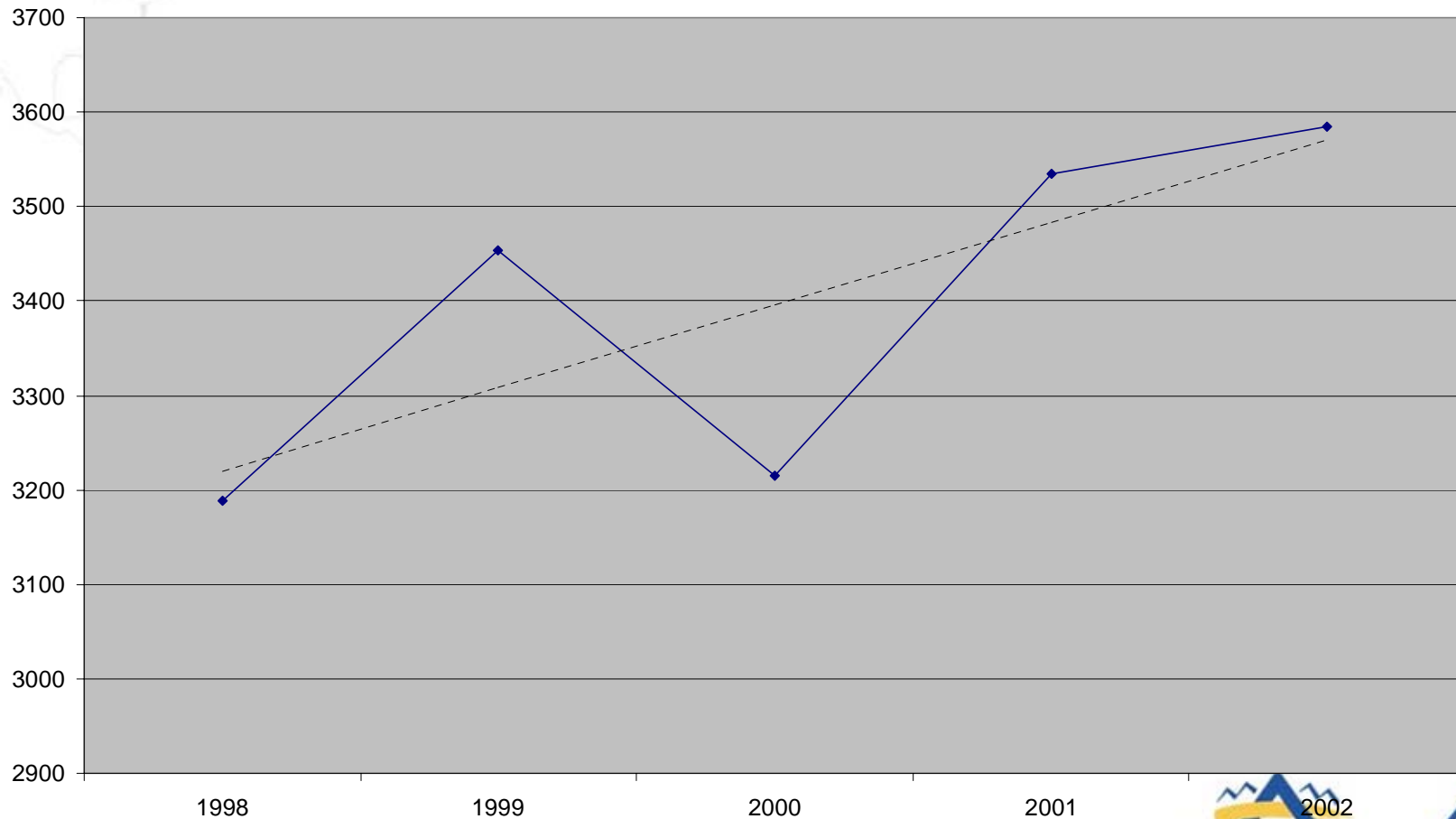
Total visits to Alberta have been declining over the past five years as indicated by the trend line (dotted line).





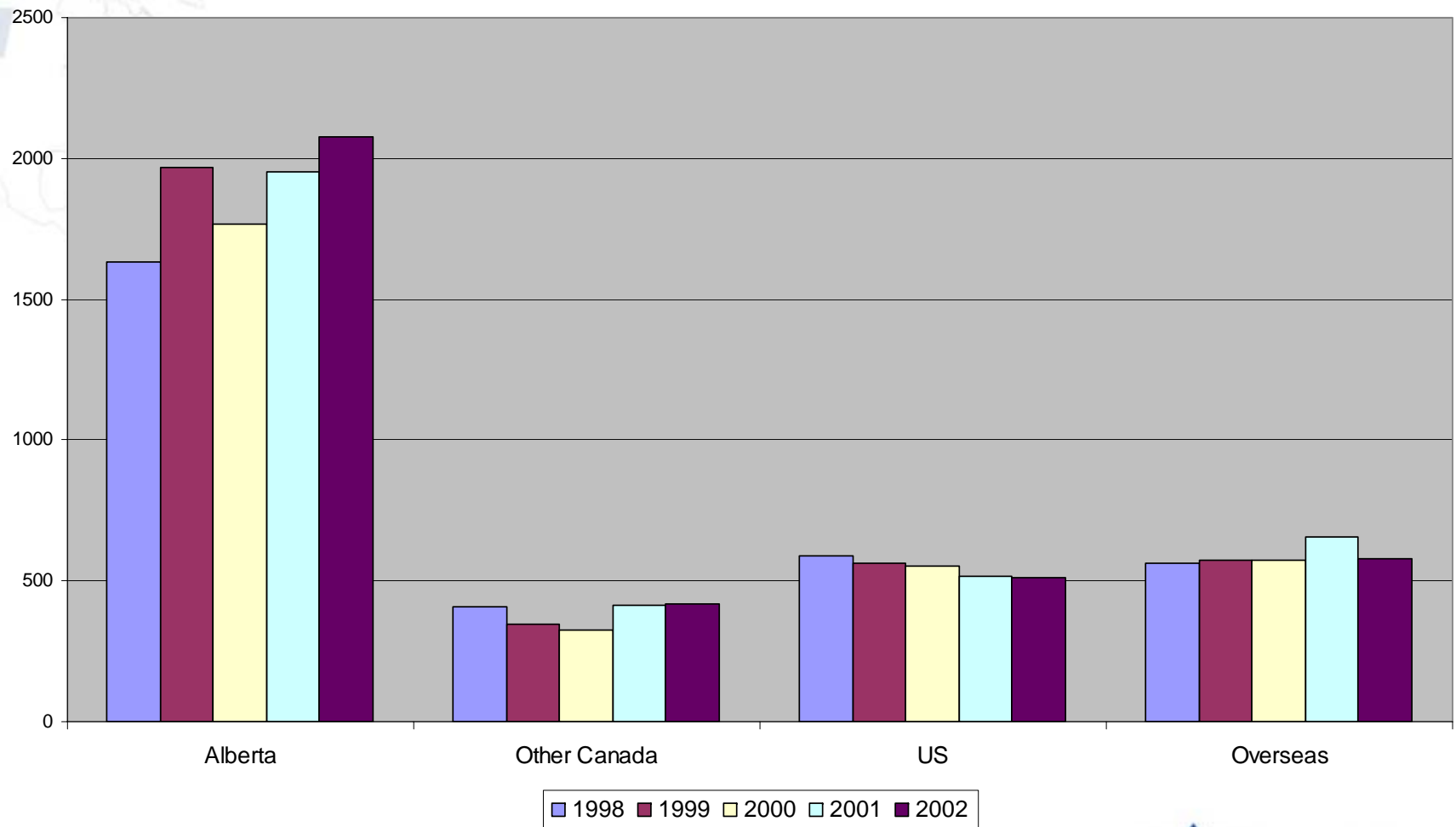
Total Visits to Rockies TDR

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



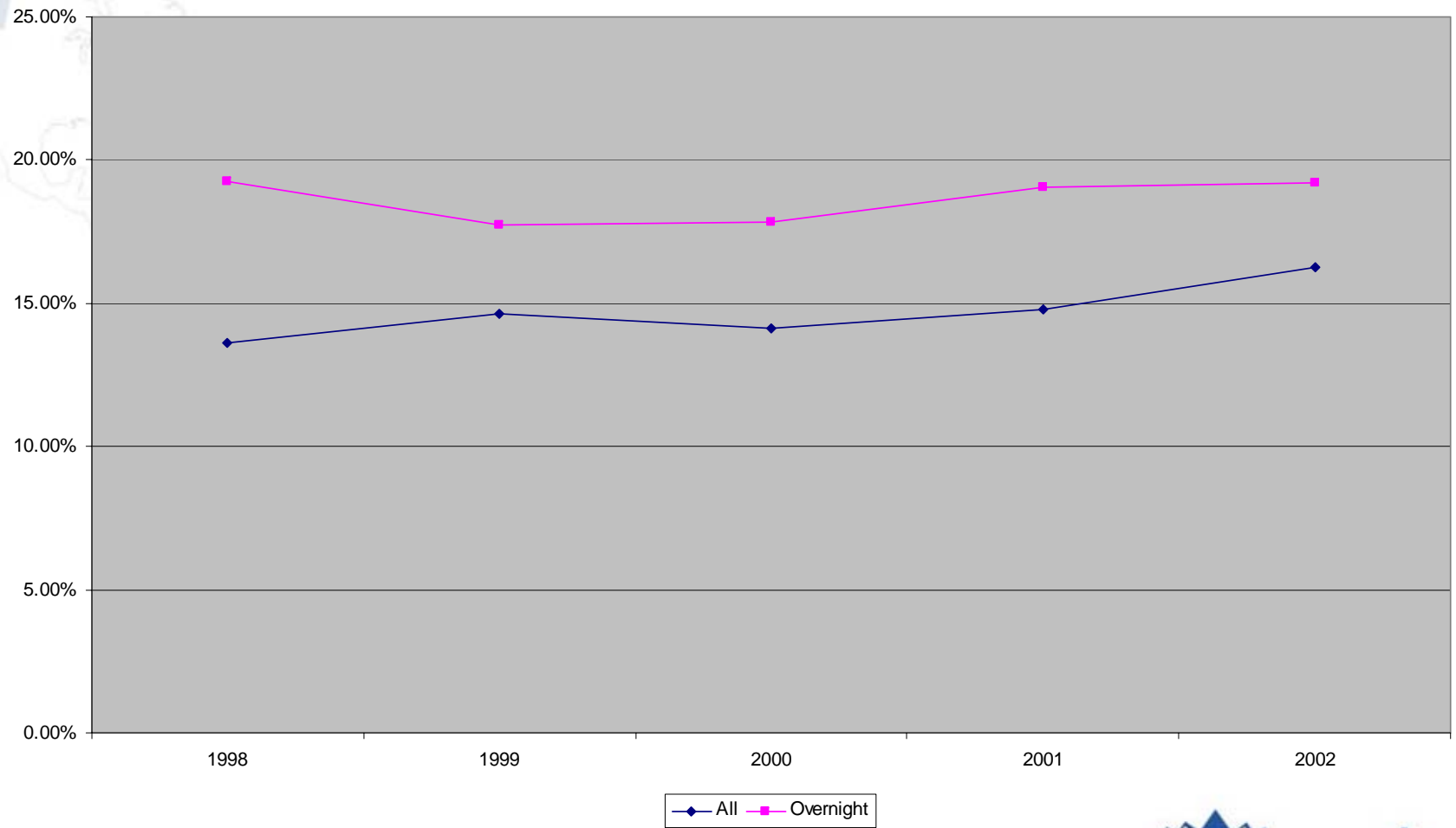


Total Visits (000s) to Rockies TDR by geo-region





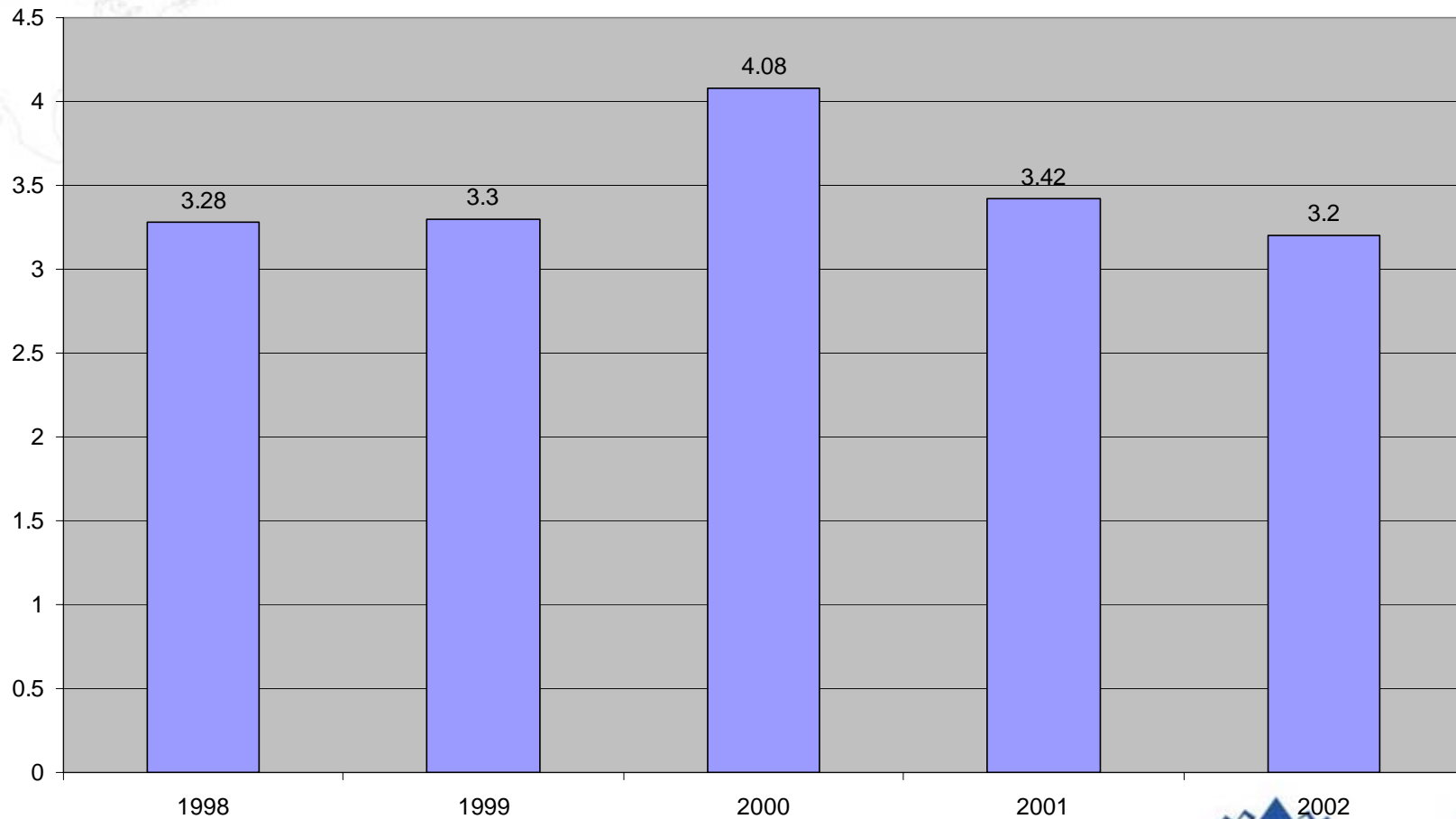
Visits to Rockies TDR All vs. Overnight as a % of all visits to and within Alberta





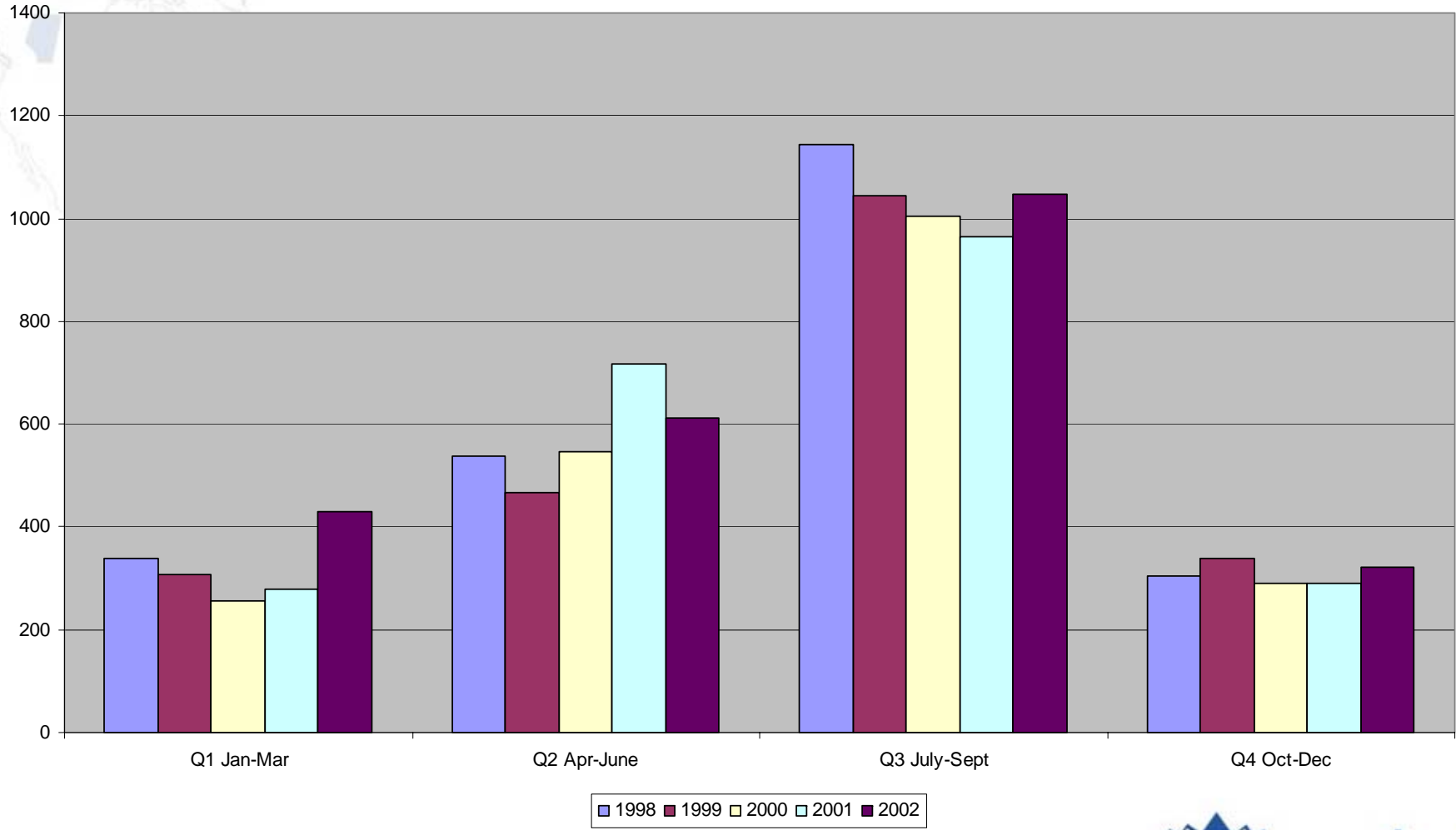
Average Length of Stay (overnight visits)

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





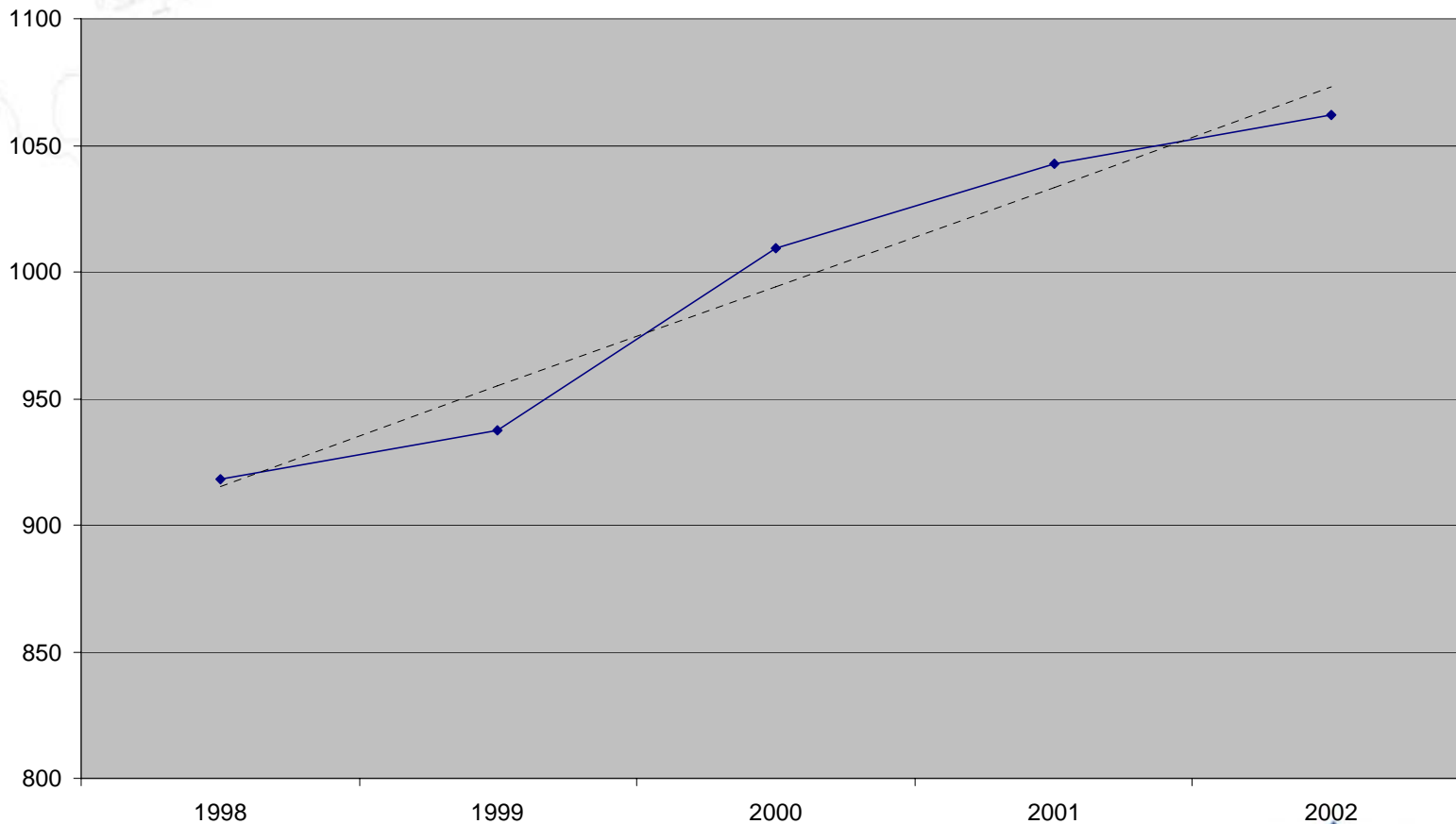
Quarter of Year when overnight trips are taken to the Rockies TDR





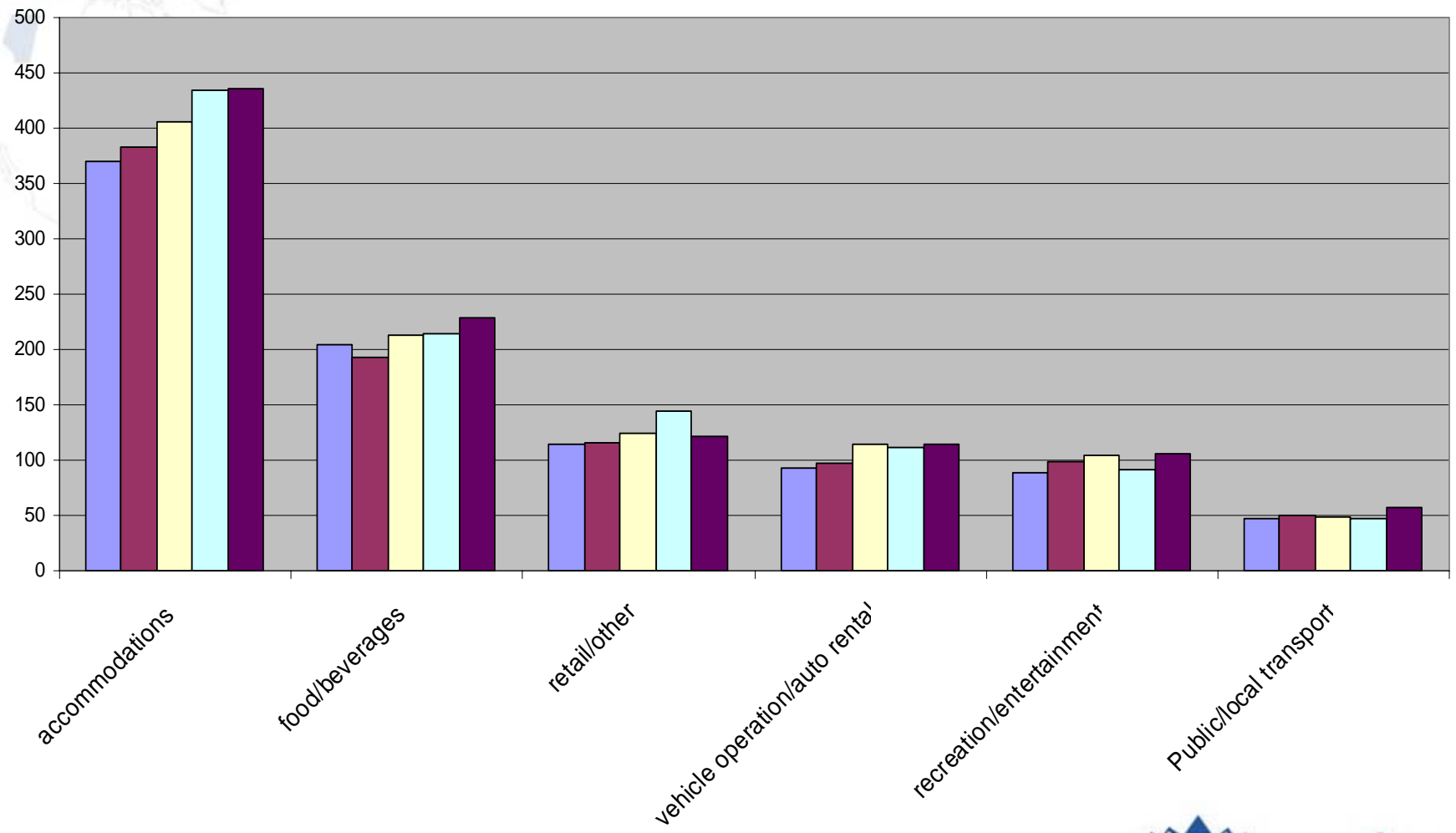
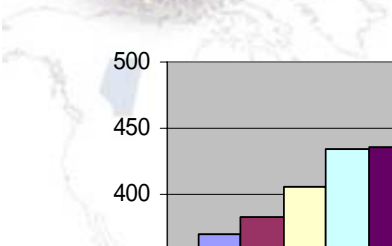
Total Expenditures in the Rockies TDR

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





Total Expenditures in the Rockies TDR



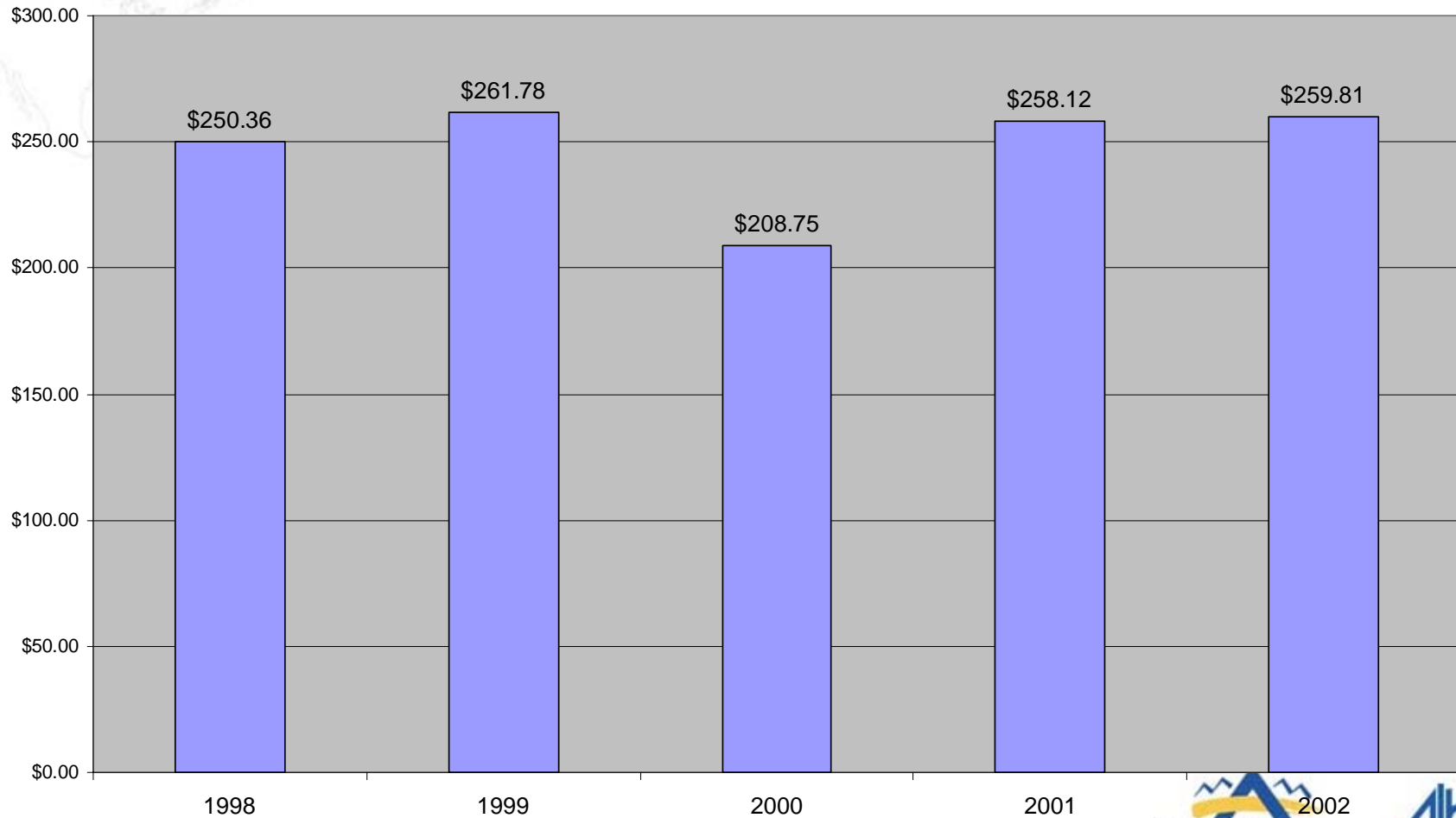
■ 1998 ■ 1999 ■ 2000 ■ 2001 ■ 2002





Average spending per party per night (overnight visits)

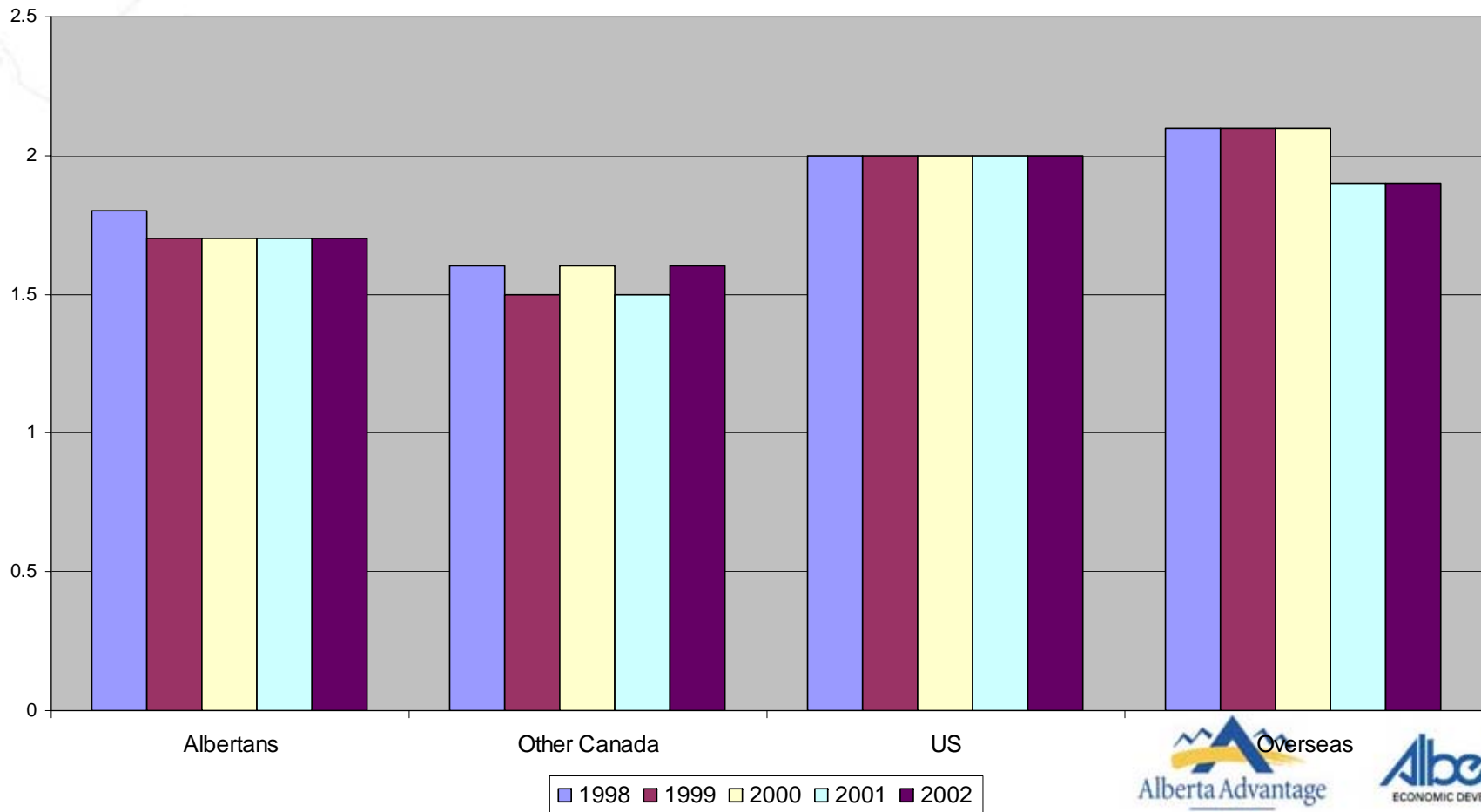
The chart shows the change in average spending per party per night in the Rockies TDR.





Average Party Size (all Alberta Visitors)

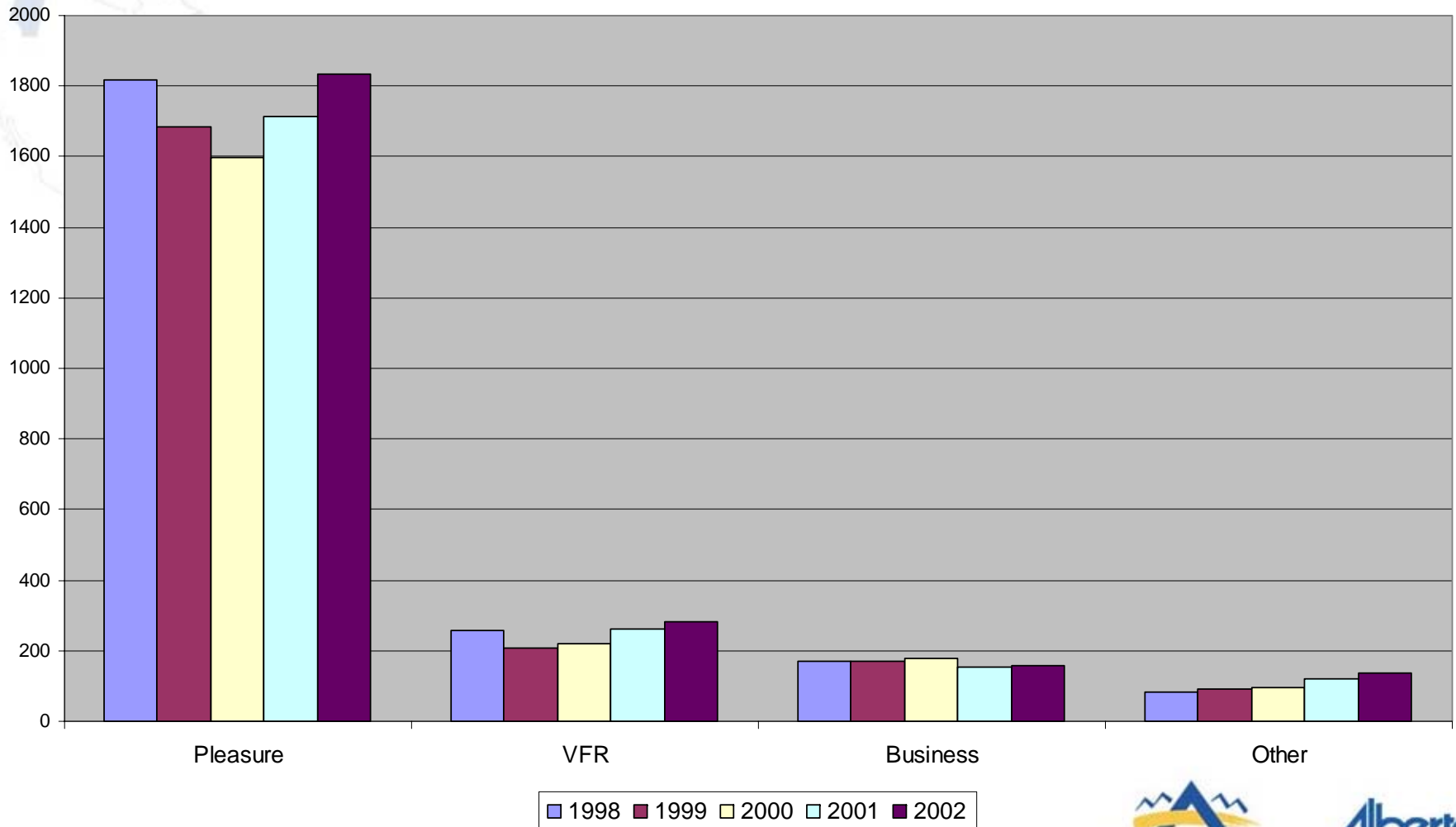
The chart shows the change in average party size for all visitor parties to and within Alberta by geo-market. There is no significant difference between party sizes to TDRs.





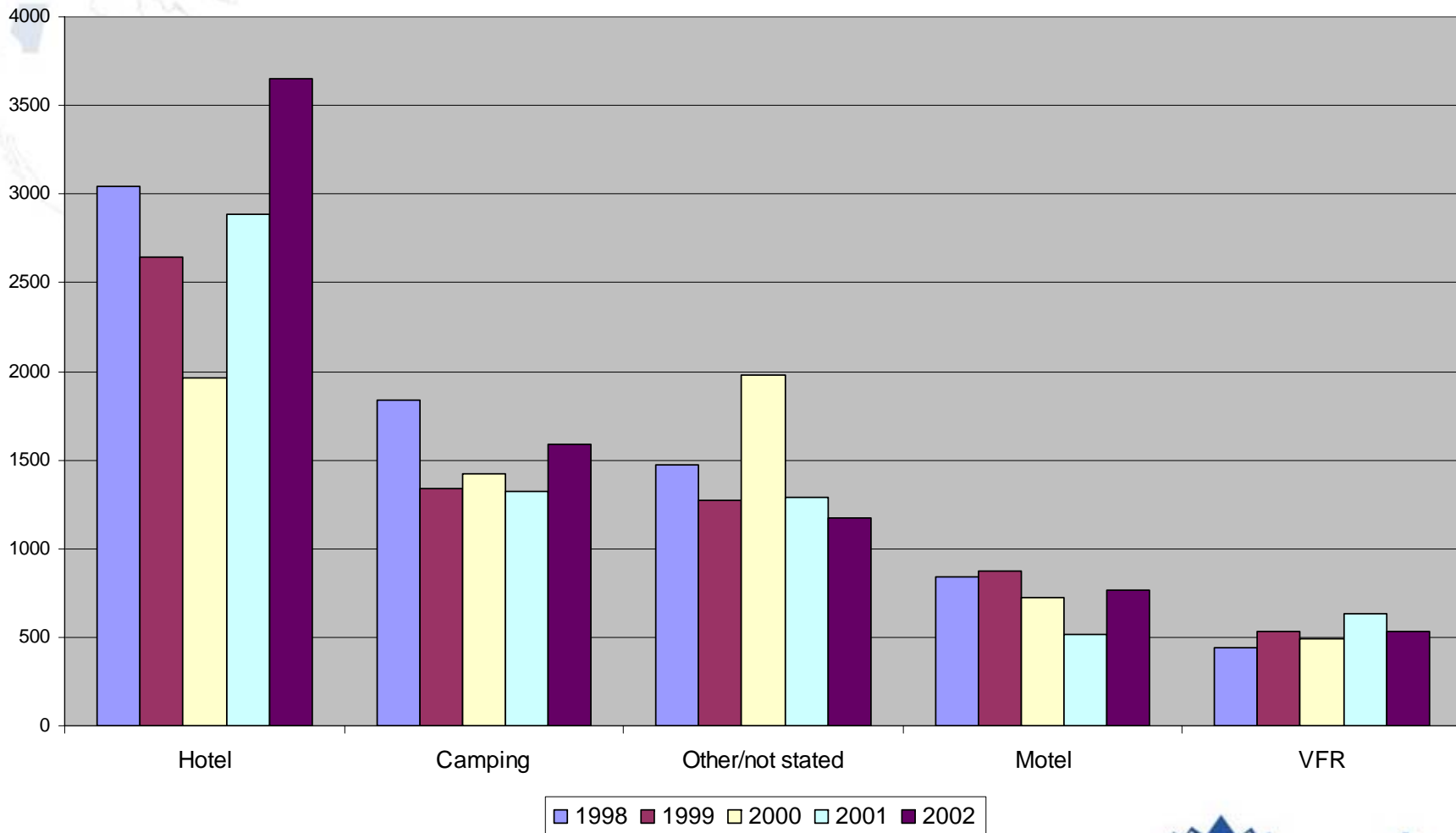
Purpose of overnight trip to the Rockies TDR (000s)

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



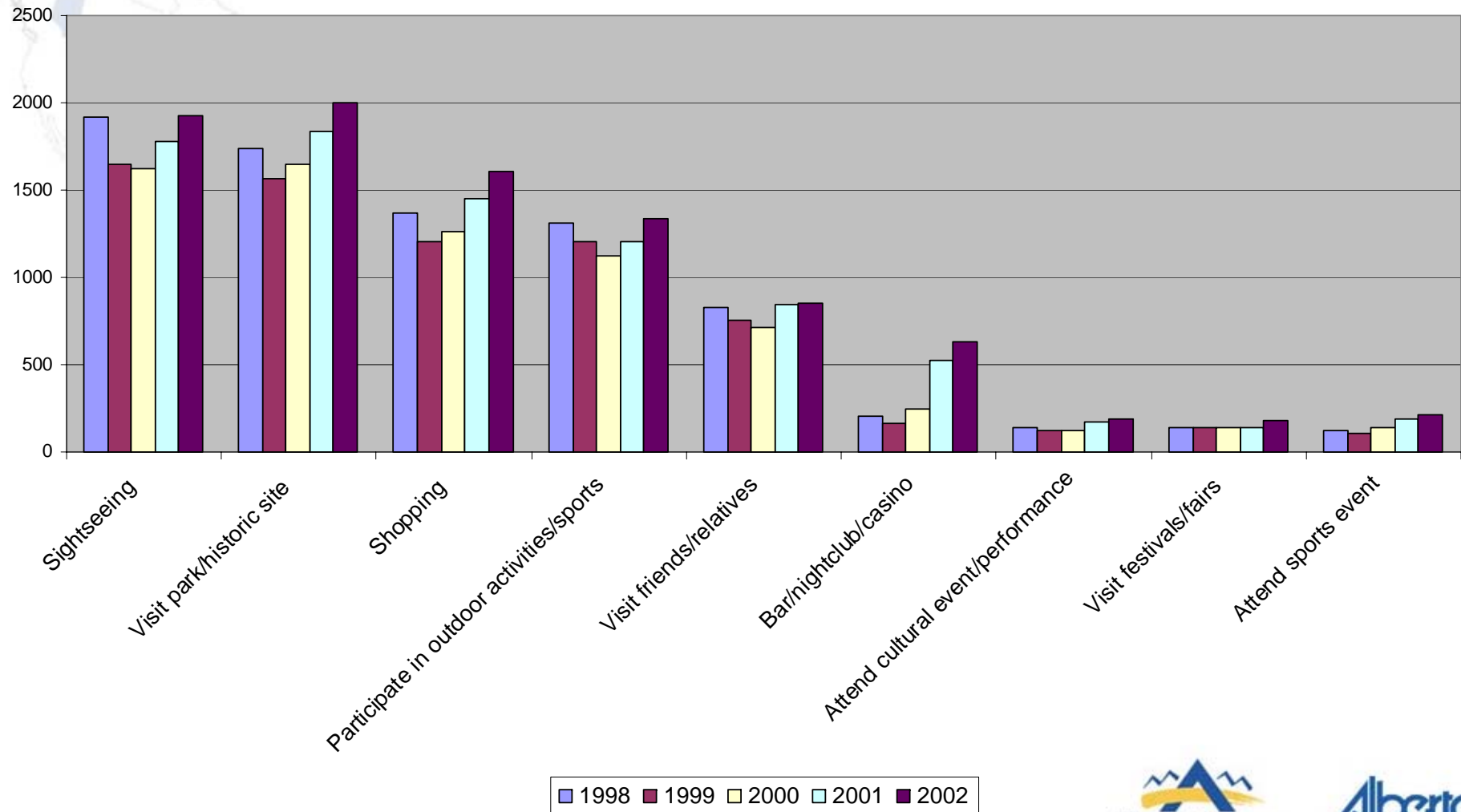


Type of Accommodation (person-nights) (000s)





Activities (overnight visits) (000s)





Pre-Summer Operator Study



Banff

- As a one-industry, 95-per-cent, tourism-oriented town, Banff relies on an effective and financially stable airline industry to encourage international visits. The current state of our national carrier and impact of Air Canada's instability on incoming international travel plans remains a concern.
- Following the slower winter and spring shoulder season, operators are anticipating the summer months with optimism. Surveyed hotels all report expected visitor levels exceeding 2003; in at least one site, levels could be up by as much as 20 per cent.
- Operators notice a discernable bounce in Asian bookings and hope it will bring Japanese and Taiwanese visitors back to 2002 levels.
- The question marks affecting U.S. visitor numbers include the presidential-election-year impact, a perceived resistance for out-of-country travel due to the Iraq war and the negative effect of a strengthening Canadian currency.



Pre-Summer Operator Study

- Most hotels are not expecting a large influx of Europeans to visit Banff in 2004 due to economic conditions and travel fears.
- With the expected return of some international markets, a decline is predicted in domestic visitors, who chose Banff in 2003 for its attractive pricing and room availability.

Jasper:

- Entering 2004 with guarded optimism, Jasper experienced a winter season undermined by one of the poorest ski seasons in recent history. 2004 was the second successive year of poor snow conditions. One survey participant described 2003/04 as the worst winter in recollection and March as the poorest in history.
- Although Jasper hotel operators are cautiously optimistic heading into summer, the outlook is filled with uncertainty. Several hotels report recovery appears evident with much stronger seasonal pre-bookings. Others are more reticent in their projections and are of the opinion that this year will be similar to 2003.



Pre-Summer Operator Study

- Convention and group travel are viewed optimistically as stable and strong markets.
- International visitors will not be seen in large numbers this summer, according to our survey.
 - European visitor numbers, with the exception of a strong U.K. market and an increase in Italian bookings, are not expected to show recovery in 2004.
 - The Asian market is not large in Jasper, but a slight increase in the number of Japanese group bookings is evident.
 - Numbers of Americans travelling to Jasper are expected to grow as U.S. travellers seek safe and natural vacations close to home.
 - Regional travellers are expected to predominate in the shoulder seasons, with their summer season travel decisions depending on price and room availability.



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 Rockies TDR

- The mean age of Alberta travelers coming to the Rockies is 42, with a higher than average concentration in the 25-44 age group, and a slightly lower than average concentration in the 65 or older age bracket.
- A slight majority of planned visits is by males (52%).
- Mean household income for travelers visiting the Rockies is the highest of all the travel destination regions at \$70,700
- With 35% of all Albertan travelers planning to travel to the Rockies, this region will receive the largest proportion of Albertan travelers of all of the Tourism Destination regions.
- Of all Albertan leisure travelers to the Rockies over the next six months, 46% will be from Calgary and area.
- 47% of all Calgary travelers and 36% of all Edmonton travelers will visit the Rockies during the next six months.
- The largest proportion of travelers to the Rockies is also going to the Edmonton region. A higher proportion of travelers to the Rockies are planning trips to the rest of Canada.