

**Alberta Leisure Travel
Intentions Study
(May 1st, 2005 – October 31st, 2005)**

Top-line Report

**Presented to:
Alberta Economic Development**

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1.0 RESEARCH METHODOLOGY

- ◆ The target population is:
 - Residents of Alberta, who are a decision-maker in their household, are 18 years or older and have taken at least one leisure trip (at least 80 km away from home) in the past 12 months.
- ◆ 1,405 respondents completed an 8-minute survey from March 11 to March 27, 2005.
- ◆ Random Digit Dialing sample was obtained to achieve a statistically accurate sample of Alberta households, including unlisted telephone numbers.
- ◆ Results were weighted to the age and gender characteristics of Albertans over the age of 18.
- ◆ Significant differences are reported at the 95% confidence level.

2.0 EXECUTIVE SUMMARY

- ◆ Albertan Travellers¹ are planning to take an average of 6.4 leisure trips during the next 6 months. These include trips both within and outside of Alberta. This is down slightly from 7.4 leisure trips planned between May 1st, 2004 and October 31st, 2004. The decrease to 6.4 trips is primarily due to fewer Albertan Travellers planning 10 or more trips and more planning one to four trips during the next six months.
- ◆ Similar to previous years, Alberta will receive the largest proportion of Albertans' leisure travel, as 75% of trips are planned for Alberta destinations.
- ◆ More than forty percent of Albertan Travellers are planning at least one trip to the Canadian Rockies (43%) while slightly less than one-third are planning to visit Edmonton and Area (32%), Calgary and Area (30%), or Alberta Central (29%) during the next six months. Twenty-two percent are planning a trip to Alberta South, while 11% are planning a trip to Alberta North.
- ◆ An average of 1.6 trips are planned to destinations outside of the province.
- ◆ Over half (57%) of all trips that Albertan Travellers expect to make in the next 6 months will be a weekend in duration, while more respondents are planning to take trips 3 to 7 nights in length (18%) compared to 2004 (11%). Consequently, the average length of trips planned by Albertan Travellers has increased compared to 2004.
- ◆ One-quarter of trips are planned with less than one weeks notice (27%), one-quarter are planned with two to three weeks notice (23%), and 50% of trips are planned anywhere between three weeks to more than 6 months in advance.
- ◆ The top information resources used to plan leisure trips include: the Internet in general (40%), word-of-mouth (21%), the Alberta Motor Association (AMA) (21%), and previous experience (15%).
- ◆ Approximately ninety percent of Albertans (89%) are aware of the Alberta Centennial this year, which has been steadily increasing, as only 77% were aware in September 2004 and 66% were aware in May 2004.

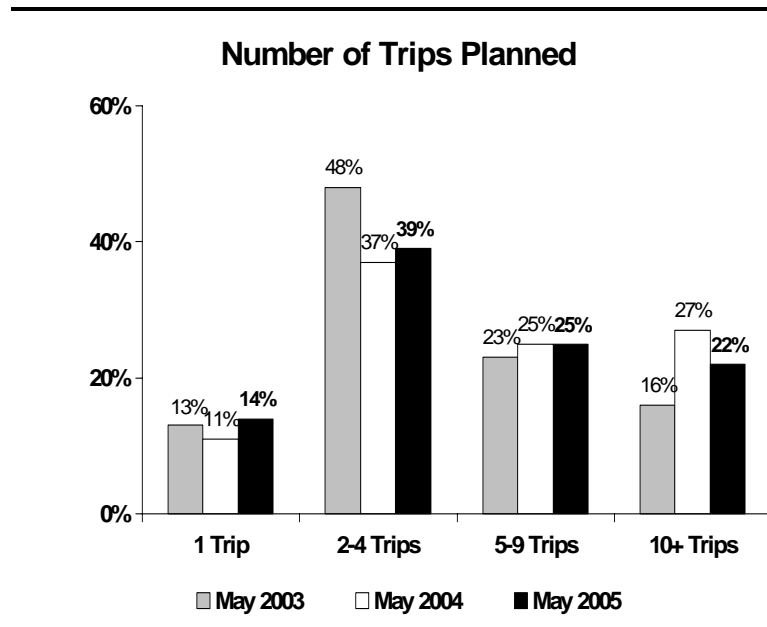
¹ Albertan Travellers are those respondents planning to take at least one leisure trip in the next 6 months (May 1st, 2005 to October 31st, 2005) (n=1,291).

3.0 ALBERTA OVERVIEW

3.1 Travel Intentions

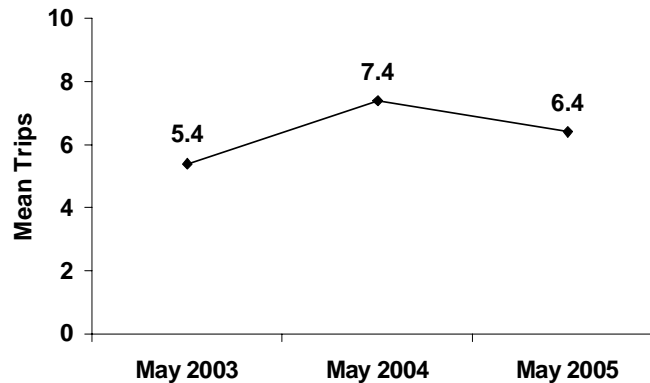
3.1.1 Trip Intentions

- ◆ Of all Albertans surveyed, 92% are planning to take at least one leisure trip in the next 6 months.
- ◆ Albertan Travellers are planning to take 6.4 trips, on average, over the next 6 months (May 1, 2005 to October 31st, 2005). These include trips both within and outside of Alberta.
- ◆ The decrease to 6.4 trips is primarily due to fewer Albertan Travellers planning 10 or more trips and more planning one to five trips during the next six months.



- ◆ The total trips planned by Albertan Travellers are slightly lower than May 1st, 2004 to October 31st, 2004, but higher than reported in 2003.
- ◆ “Comfort Seekers”² (average trips = 7.4) and “Accomplishers” (average trips = 7.1) are planning between 1 and 2 more trips during this time period than “Real Relaxers” (average trips = 5.7) or “Urban Explorers” (average trips = 5.1).

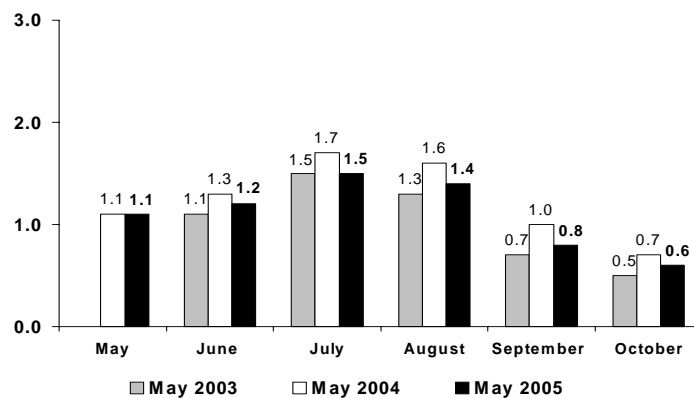
Average Trips Planned (May through October)*



*In 2003, the time frame was June - November

- ◆ As with previous survey years, the largest number of trips are planned for the months of July and August 2005.

Average Number of Trips Planned by Albertans by Month



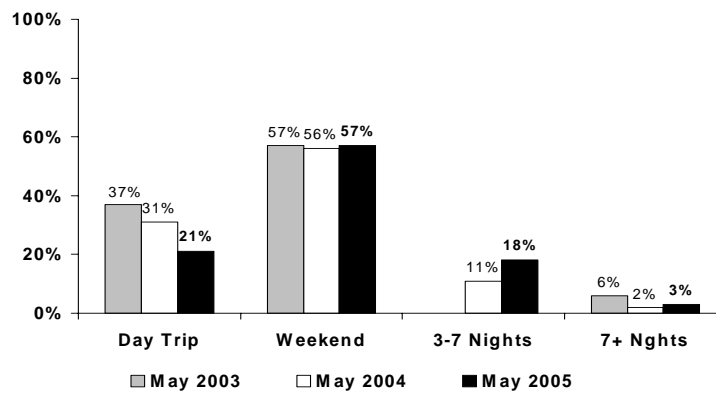
Intentions for trips in May were not asked in 2003

² Refer to Page 10 of this report for the segment definitions.

3.1.2 Trip Duration

- ◆ Over half (57%) of all trips to be taken by Albertan Travellers within Alberta between May 1st, 2005 and October 31st, 2005 will be a weekend in duration.
- ◆ The proportion of trips 3 to 7 nights in length has increased compared to last year, with a corresponding decline in the number of day trips compared to previous years.
- ◆ “Comfort Seekers” (21%) are significantly more likely to take trips that are 3 to 7 days in length than other segments (Real Relaxers – 18%, Accomplishers – 17%, Urban Explorers – 15%).

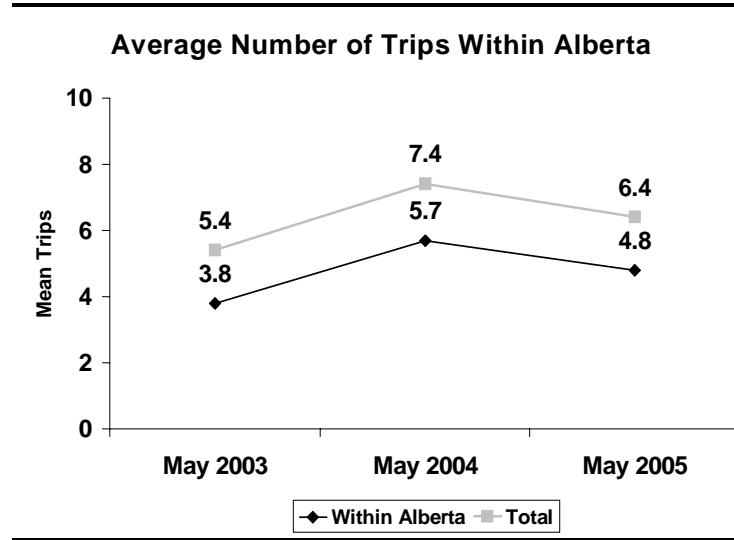
Proportion of Alberta Trips by Duration*



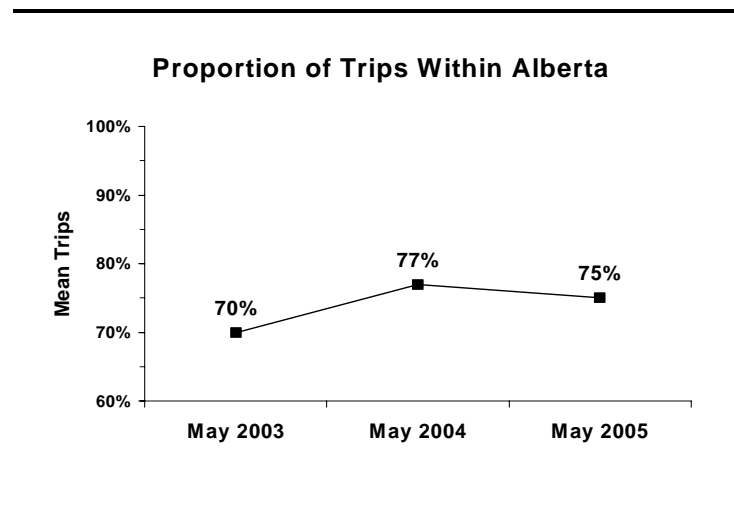
*Note that in 2003, the question listed 'one night stay' a 'weekend or long weekend', and 'one week or longer' as options.

3.1.3 Trip Frequency

- ◆ Of all trips intended over the next 6 months, almost 5 trips, on average, will be taken within Alberta.
- ◆ The average number of trips planned is approximately 14 percent lower than 2004. Fewer travellers are planning 10 or more trips and more are planning 2 to 4 trips than in 2004, resulting in an overall decline, on average, in the number of trips planned in 2005.



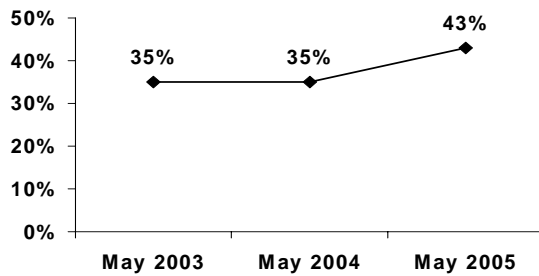
- ◆ Three-quarters (75%) of all trips planned during May-October 2005 will be to Alberta destinations, which is slightly less than for the same period last year (77%).
- ◆ “Real Relaxers” (77%) and “Comfort Seekers” (77%) tend to take slightly more of their trips within Alberta than “Urban Explorers” (72%) and “Accomplishers” (71%).



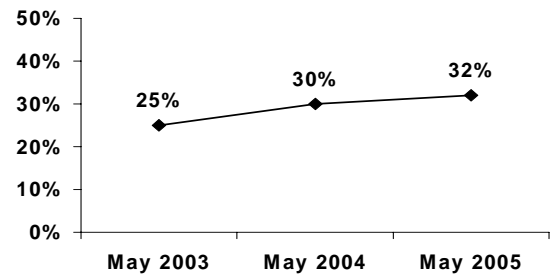
3.1.4 Destinations Within Alberta

- ◆ More than forty percent of Albertan Travellers are planning at least one trip to the Canadian Rockies (43%) while slightly less than one-third are planning to visit Edmonton and Area (32%), Calgary and Area (30%), or Alberta Central (29%) during the next six months. Twenty-two percent are planning a trip to Alberta South, while 11% are planning a trip to Alberta North.
- ◆ Compared to May 1st, 2004 – October 31st, 2004, significantly more Albertans are planning to take at least one trip to the Canadian Rockies in the next 6 months.
- ◆ There has been a steady increase in the number of Albertan Travellers planning trips to Edmonton and Area since 2003.

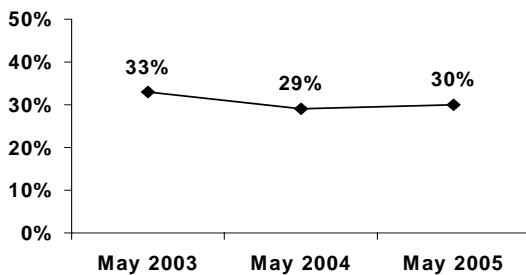
Proportion of Albertans Traveling to the Cdn. Rockies



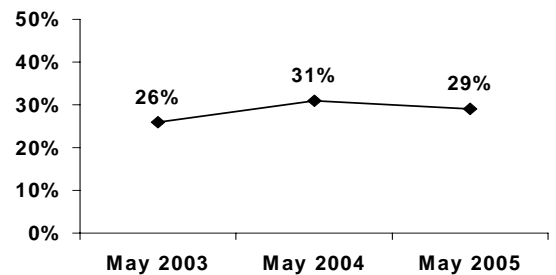
Proportion of Albertans Traveling to Edmonton and Area



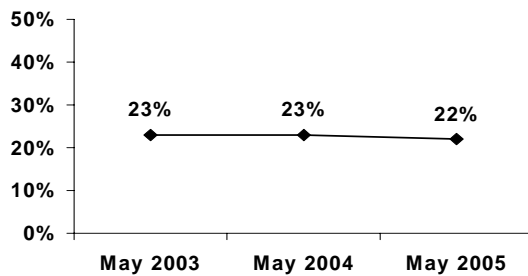
Proportion of Albertans Traveling to Calgary and Area



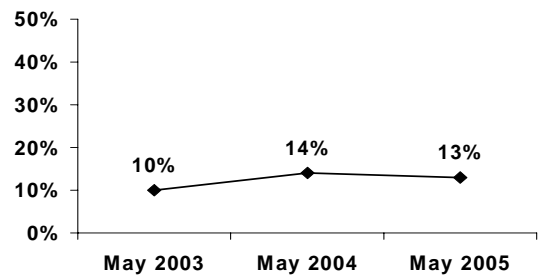
Proportion of Albertans Traveling to Alberta Central



Proportion of Albertans Traveling to Alberta South



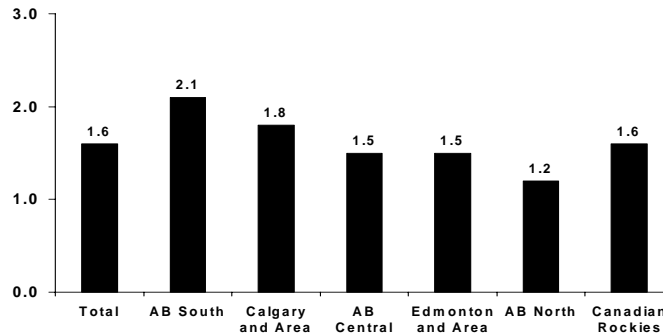
Proportion of Albertans Traveling to Alberta North



3.1.5 Destinations Outside Alberta

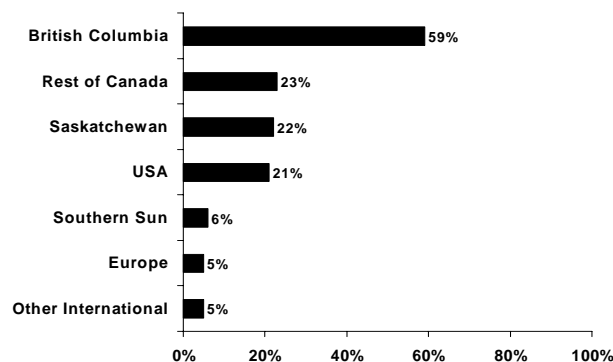
- ◆ An average of 1.6 trips are planned by Albertan Travellers to destinations outside the province.
- ◆ Travellers from Alberta South and Calgary and Area are planning the largest number of trips outside Alberta, at 2.1 and 1.8 trips, respectively.

Average Number of Trips Outside Alberta



- ◆ British Columbia attracts the largest number of Albertan Travellers.³ Fifty-nine percent of Albertan Travellers are planning to take at least one trip to B.C. during the next 6 months. The “Rest of Canada”, Saskatchewan and the U.S. are the next most popular destinations for Albertan Travellers, followed by other, more distant destinations.
- ◆ “Accomplishers” and “Comfort Seekers” are more likely to plan trips to B.C., while “Real Relaxers” are more likely to plan trips to Saskatchewan and “Urban Explorers” are more likely to plan trips to the US.

Destination Plans (Outside Alberta)

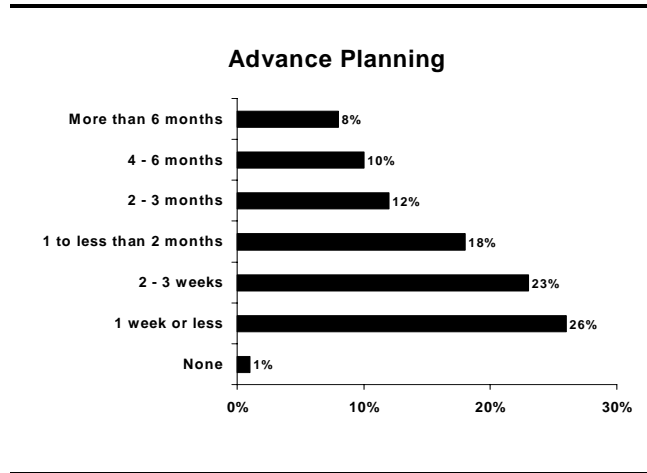


³ Base: Those traveling outside Alberta on leisure trip(s) between May 1, 2005 and October 31st, 2005 (n=855).

3.2 Trip Resources

3.2.1 Advance Planning

- ◆ One-quarter of trips are planned with less than one weeks notice (27%), one-quarter are planned with two to three weeks notice (23%), and 50% of trips are planned anywhere between three weeks to more than 6 months in advance.



3.2.2 Information Sources⁴

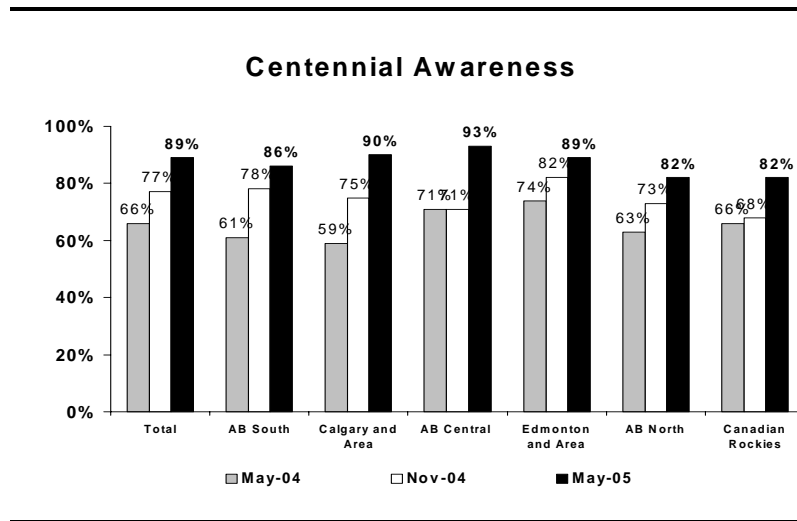
- ◆ The most common sources of information for travel are the Internet, word-of-mouth, the AMA, and previous experience.
 - Calgary & Area travellers are more likely to use the Internet in general, while travellers from Alberta South, Alberta Central and Alberta North are more likely to rely on word-of-mouth.
 - Edmonton and Area travellers are more likely use the AMA, while Alberta South travellers are more likely to rely on previous experience.
 - “Real Relaxers” are least likely to use the Internet as a source and most likely to rely on previous experience.

Main Sources of Information	TOTAL	AB South (A)	Calgary and Area (B)	AB Central (C)	Edmonton and Area (D)	AB North (E)	Canadian Rockies (F)
Internet in general	40%	41%	45%D	39%	35%	37%	36%
Friends/Family/Word-of-Mouth	21%	26%D	19%	26%BD	17%	31%BD	25%
Alberta Motor Association (AMA)	21%	14%	17%	18%	30%BCE	15%	13%
Previous experience/visits	15%	25%BCD	13%	15%	14%	19%	14%
Brochures and pamphlets	6%	5%	7%	5%	7%	3%	4%
Travel Alberta website	5%	3%	7%	3%	6%	4%	4%

⁴ The letters beside the numbers indicate which segments are significantly different. For example, respondents in Calgary are significantly more likely to use the Internet in general than those from Edmonton and Area.

3.2.3 Centennial Awareness

- ◆ Approximately ninety percent of Albertans (89%) are aware of the Alberta Centennial this year.
 - Centennial awareness tends to be high among travellers from Alberta Central, Edmonton and Area, and Calgary and Area.
 - Overall awareness of the Centennial has increased compared to September 2004, when only 77% of Albertans surveyed indicated being aware, May 2004 when 66% were aware and September 2003 when 53% were aware.



3.3 Travel Intentions by Segment

The following table provides a summary of the data by segment (please see footnotes below for a description of each segment).

	Accomplishers ⁵	Urban Explorers ⁶	Comfort Seekers ⁷	Real Relaxers ⁸
# of Intended Trips (May through October, 2005)	7.1	5.1	7.4	5.7
# of Intended Trips within Alberta⁹	5.1	3.7	5.7	4.4
Trips to Edmonton & Area destinations	38%	43%	24%	27%
Trips to Calgary & Area destinations	34%	44%	23%	25%
Trips to Alberta Central destinations	27%	19%	36%	32%
Trips to Canadian Rockies destinations	48%	29%	47%	46%
Trips to Alberta South destinations	25%	15%	27%	19%
Trips to Alberta North destinations	10%	13%	15%	10%
# of Intended Trips outside Alberta	2.0	1.4	1.7	1.3
British Columbia	65%	54%	62%	54%
Saskatchewan	16%	23%	21%	29%
The rest of Canada	26%	28%	21%	20%
USA	26%	25%	20%	16%
Southern Sun	6%	5%	6%	5%
Europe	3%	7%	5%	4%
Other International	10%	5%	2%	5%
Number of Alberta Trips Planned by Trip Length				
Day	1.4	1.1	1.3	1.2
Weekend	3.6	2.8	3.8	3.0
3 to 7 Days	1.1	0.7	1.4	0.9
7 or more Days	0.2	0.1	0.2	0.2
Segment Size	21%	24%	37%	19%
Travel Party				
Adult Couples	48%	37%	41%	55%
Family with Children under 18	28%	32%	40%	32%
Group of Friends	27%	21%	17%	8%
Single Traveler	17%	18%	12%	10%

⁵ “**Accomplishers**” are looking for new and unfamiliar places to visit and new things to do. They don’t mind some action and excitement.

⁶ “**Urban Explorers**” seek to get away from daily routine and see new places, preferably exciting, city locations.

⁷ “**Comfort Seekers**” have a strong preference for familiar and rural locations. They seek relaxation and want to get away from the daily routine and strengthen family bonds.

⁸ “**Real Relaxers**” are looking for tranquility and some peace and quiet. They prefer to do nothing during their leisure trips.

⁹ Percentage adds up to more than 100% as respondents were asked to specify up to four potential destinations within Alberta.