

Pre-Summer 2008
Alberta Tourism Operator Survey

SURVEY REPORT

Prepared for:

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Provincial Overview

The 2008 Pre-Summer Alberta Tourism Operator Survey was conducted from April 29 to May 6. Leger Marketing obtained feedback from 85 tourism industry operators located in 45 Alberta communities and in Canada.

- Across Alberta and within all industry segments, operators anticipate an increase in demand from local markets, expecting more travellers to remain closer to home due to the high costs of fuel. Because of this, many operators are focusing their key marketing campaigns on regional markets in Alberta.
- Operators in Banff and Waterton Lakes National Parks reported either increased business volume or no change over last year, for January through April 2008. With the number of advanced bookings, warm weather and planned events and festivals, operators are optimistic with the way the business volume is shaping up for the summer.
- Overall, operators in the Jasper National Park region reported either no change in business volume or a decrease in occupancy levels over last year for January through April 2008. Operators expect a quiet May, due to cold weather and the slow down in the oil patch. Occupancy in June is predicted to be similar to last year, while July and August look more promising due to the warmer weather, the number of advanced bookings and the increased number of hits on operators' websites.
- Northern Albertan operators reported no significant change in business volume from January to April over the same period in 2007. The overall outlook for May and June 2008 is positive, and bookings for July and August have already begun for both individual travel and group tours. Operators note that the lower industrial activity, the decreased number of energy sector workers in the region, the decreased number of American travellers, and the high prices for transportation, food, and accommodations may negatively affect volumes for the remainder of the year.
- Central Alberta operators expect to see only marginal changes in their business volume compared to last year. Similar to other regions' thoughts on the rising price of gas, operators in Central Alberta feel that if gas prices continue to increase they might see an increase in short haul visitors to the area.
- Southern Alberta operators reported that they had a good winter overall, with some experiencing a significant increase in business volume. Operators note that the favourable economic conditions in Alberta and a strong corporate market contributed to the positive numbers.
- Calgary operators had a successful winter 2007/2008 season. Positive economic conditions combined with new business strategies, including focusing marketing efforts

on the Alberta market and forging beneficial new partnerships, will continue to protect Calgary operators from the potential pitfalls of the unstable U.S. market and uncertainty in the oil and gas industry.

- Edmonton operators enjoyed an increase in corporate demand this winter. Operators note that the near future is uncertain due to the influences of the weakened oil and gas sector, an unfavourable U.S. exchange rate, and an uncertain economic future for Canada and the U.S. Operators expect business to increase by 10% this summer, with the hope that local patronage and alternative international markets will sustain and increase Edmonton tourism.
- Campground and RV park operators expect a 10% increase in business volume this year thanks to a summer full of events, increased long-term stays, and more in-province travel. Although a closely monitored concern, the price of fuel is not expected to significantly impact visitors from the U.S.
- Operators in the group tours sector are adjusting their focus to international markets and Canadian markets this year due to the cost of fuel and the impending U.S. election, which may have a negative impact on U.S. travellers to Alberta. Group tour operators are anticipating the volume of Mexican tourists will increase with the introduction of the new direct flights from Mexico to Alberta that commence June 1.
- Attraction and event operators are enhancing their marketing efforts this year, focusing on domestic, European, and Mexican tourist markets to achieve an expected 20% increase in volume. The cost of fuel is expected to impact attractions and events that require visitors to drive. Also, the weather will play a pivotal role in the number of tourists enjoying outdoor events.
- Pre-bookings for adventure vacations have indicated a similar volume of business in 2008 compared to last year. Various current events suggest that visitation from the U.S. market will be down this year, and the strength of the Canadian dollar is expected to keep away some visitors from abroad. Operators in this sector are looking forward to reaping the rewards of increased marketing in domestic markets and Australia.

Alberta operators cite the following notable concerns that may negatively impact the 2008 summer season.

- Operators are concerned about the impact of high gasoline prices. Long haul traffic is projected to decrease substantially. However, the anticipated increase in short haul visitors may counterbalance the effects on the industry.
- Operators expect that the slow down and instability of the energy sector may reduce demand for accommodations, particularly in the Jasper Park Corridor.

- Several businesses throughout the province are concerned that Alberta may be viewed as a less attractive destination by international markets due to the value of the Canadian dollar and the high costs of products and services.
- Concerns about the impact of high fuel prices are more prominent than concerns about staffing. The availability of staff was a more prominent concern in previous years. Still, operators in northern and western regions of the province are having particular difficulty competing with the high compensation packages offered in the energy sector.
- Operators predict that U.S. demand will decrease again this year because of the value of the U.S. dollar and the unstable U.S. economy. Additionally, operators point out that tourism beyond the U.S. borders is always lower in election years. Many operators in Central Alberta do not rely specifically on American visitation, so the effects of the decreased demand should be negligible in that sector.

Independent Travellers

Banff and Waterton Lakes National Parks

Banff and Waterton Lakes National Parks regularly attract regional, national and international tourists. Compared to previous years, operators noticed an increase in the corporate market during the winter months. Operators attribute the jump to increased online marketing and an increased presence at corporate trade shows across Western Canada.

Compared to last year, tourism operators noticed an increase in group-tour traffic and repeat clientele. Businesses attribute the increase to concerted marketing efforts within the local regions. Operators note that the overall quality of the ski conditions and the strength of the Alberta economy contributed to the successful winter 2007/2008 season.

Operators in Banff and Waterton Lakes National Parks are optimistic that the months of May and June will be positive, and expect a “hot season” in July and August of 2008. The optimism is based on the number of bookings for May and June, the expected warm weather, and the anticipated customer response to events, festivals and tournaments. Operators are planning to amplify their local marketing efforts to capitalize on upcoming planned events.

Businesses that experienced a rise in the corporate market this past winter expect that the corporate bookings will continue to increase this summer. However, those businesses with a heavy reliance on the energy sector are concerned that the solid winter bookings may not continue into summer due to instabilities in the oil and gas industry.

Businesses are optimistic that new flights from Mexico will increase the number of Mexican tourists. It is expected that the European market will continue to be promising, specifically the German and Austrian markets. Operators expect the U.K. market, which provided a steady stream of tourists over the winter months, will continue to grow.

Operators believe that the high cost of fuel, the strong Canadian dollar, and increasingly competitive markets worldwide will have a slightly negative impact on the international market this year. Also, given the strength of the Canadian dollar and the slowdown of the U.S. economy, operators predict a decrease in the number of tourists travelling to Alberta from the U.S.

Operators expect a greater opportunity to capitalize on the portion of regional markets that may be looking for local tourism options due to the high cost of fuel. This is projected to offset the decrease in travel from the United States. Operators have already noticed increased demand from local and repeat visitors.

For the third year in a row, tourism operators continue to be concerned about staffing. Businesses located outside of Calgary and Edmonton city limits, in particular, are experiencing increased difficulty in retaining good quality staff. Many operators are losing

staff to companies outside the tourism industry that can offer employees better compensation benefits. To compete with these compensation packages, tourism operators would need to increase their prices which may, in turn, decrease demand.

Jasper National Park

Operators reported less than favourable occupancy rates for the Jasper accommodation industry over the past four months, particularly among businesses that cater to the energy sector. The unfavourable results occurred at the same time workers from the energy sector moved west to British Columbia and east to Saskatchewan.

The slow period was expected to continue throughout May. Preliminary bookings are creating confidence that the volume for June will be similar to last year. Operators predict an increase over last year during July and August because of the anticipated warmer weather, the high quantity of advanced bookings, and the number of hits on the operators' websites. Tourism operators project that tour groups heading for Alaska will contribute a steady stream of business until fall.

Local airlines added new flights, providing increased opportunities for Jasper tourism operators. Beginning in June, more frequent flights and convenient connections to Mexico will open doors to a promising new market. Operators expect that the strong Euro will bring more travellers from already steady markets in Germany and the U.K. Businesses expect that concerted marketing efforts in Australian newspapers will help draw more tourists interested in visiting the Rocky Mountains.

Operators in this region predict that the 2006 and 2007 trend toward more short haul travel and less long haul travel will continue in 2008. Operators believe that the trend will accelerate due to increasing travel costs such as fuel surcharges added to air travel costs and the higher price of fuel. Businesses are shifting marketing campaigns to target local visitors. Advertising costs are lower in domestic markets and this new focus offers operators an opportunity to turn local visitors into repeat customers who can visit regularly.

Operators believe there will be fewer travellers visiting from the U.S. over the summer due to the declining value of the U.S. dollar relative to the Canadian dollar and the weakening economy south of the border. Another factor related to the expected decline in visitation from the U.S. is the upcoming presidential election. Elections in the U.S. have historically resulted in lower than average travel from the U.S. to Alberta. Since the U.S. market is not a major income source for Jasper operators, the predicted decrease is expected to have a negligible impact on the industry.

The prosperous housing market in Jasper is attracting travellers from Korea, Japan and China who are visiting the region while searching for investment properties. The high disposable income in Alberta has piqued the interest of foreign companies that wish to set up businesses in the region, thereby creating a notable increase in corporate travel.

The impact of higher fuel prices on income and operating costs, compounded by potential decreases in international travel due to the strength of the Canadian dollar are increasing the overall level of uncertainty among operators in the Jasper region.

Banff Park Corridor – Canmore and Kananaskis

The tourism industry in the Banff Park Corridor enjoyed a successful start to 2008. The great ski conditions attracted regional, national and international tourists alike. Hoteliers benefited from the traffic to the ski hills with an average increase of 10% in occupancy rates compared to 2007. Major renovations and acquisitions in the accommodation industry allowed for increased capacity through growth in the quantity of rooms available. Banff Park Corridor operators attribute some of this success to the stable Alberta economy, increased visibility online, and increased interest in the region from the corporate market.

Operators predict that the solid level of business captured in the winter months will continue throughout May and June of 2008. An upswing in the corporate market and resulting corporate contacts from last year has businesses expecting to see increased corporate bookings again this year, especially in the early summer months. Operators remain hopeful that July and August will be as successful as last year, despite the negative influence of high fuel costs.

Tourism operators note that there are differences in the market compared to last year, not only because of a strong Alberta economy, but also because operators are advertising toward the local market. Businesses believe there is a potential to create repeat visitors from the ‘backyard’ travellers. In addition to this market, operators in the Banff Park Corridor expect an increase in visitors from Korea, Spain and France.

Some operators in the Banff Park Corridor do not typically attract business from the U.S. and therefore are projecting a fairly stable number of U.S. tourists this summer. The location of the Banff Park Corridor offers travellers a scenic rest stop on their way to Alaska. A slight concern is that currency changes may negatively impact even the ‘rest stop’ travellers.

Operators are concerned that the high fuel prices will have a negative impact on tourism to the Banff Park Corridor. The worry is that long haul travellers will ‘go somewhere else, not as far away,’ from where they reside. Some operators are also concerned about global warming affecting business volume because their premises are not equipped with air-conditioning to manage the anticipated heat.

Jasper Park Corridor – Hinton and Edson

Accommodation demand in the Jasper Park Corridor during the winter 2007/2008 season was lower than in past years and occupancy was less than full capacity. Operators depend heavily on business from the energy and construction industries, which have declined.

Operators expect the typical slowdown during the early summer months, due to the oil patch shut down. The expected length of the shut down is unknown since oil companies are slow to commit to a resume date. Increases are projected for the later summer months, but operators are doubtful that occupancy levels will reach the same rates as last year.

It is anticipated that short haul traffic may increase and long haul traffic from outside Alberta may decrease, as travellers attempt to manage increasing fuel costs by travelling closer to home. Operators anticipate that the increase in short haul traffic will not be sufficient to offset the decrease in demand from the energy sector.

Hinton and Edson are not key tourist destinations for U.S. travellers. Operators expect that the anticipated decrease in travel from the American market will have a negligible impact on their business.

Last year, operators did not expect that increasing prices and a higher dollar would heavily impact business. However, this year tourism operators believe that the rising price of gasoline, the high price of airfares and the strength of the Canadian dollar will negatively impact the region. Higher gasoline and airfare prices are expected to diminish long haul traffic demand. The strong Canadian dollar is expected to decrease the appeal of the region to the international market.

Calgary

In the 2007/2008 winter season, Calgary tourism operators experienced a substantial increase in tourism volume compared to previous years. Businesses experienced a slight decrease in corporate travel and the usual decrease over Easter.

Operators believe that the strong economic conditions in Alberta and new business strategies contributed to the success of the winter 2007/2008 season. Strategic plans designed to maximize profits included marketing more aggressively toward local markets, developing new products, enhancing existing products, and creating new partnerships.

It is anticipated that volume will continue to increase over the next four months, with a slight decline in August. Assuming the weather remains good and gasoline prices level out, the number of upcoming events and bookings suggest that business for May and June will be strong. Operators project that business levels in July and August will be similar to last year's levels, but will slow as the summer season closes.

U.S. bookings have increased or remained the same for some operators while somewhat decreasing for others. Some operators predict that tourism from the U.S. will decrease due to the state of the American economy, the exchange rate, and confusion at the border. Others expect U.S. tourism to remain the same or improve as a result of new business partnerships and marketing initiatives in the U.S.

Operators attribute the healthy booking levels this summer to new marketing efforts, partnerships, increased travel within Canada, and alternative markets, including Mexico, Australia, Europe, Asia, and New Zealand. Businesses geared towards local and Canadian visitors expect to profit from the 'stay closer to home' tourist market. Operators are expecting an increase of Mexican visitors due to the direct flights from Mexico to Alberta that commence in June. The Olympic trials in Calgary and Europe's strong economies are also fuelling optimism for a strong performance from international markets.

Operators agree that the cost of gasoline, the relative strength of the Canadian dollar, and the U.S. slowdown may potentially impact their business outlook over the next four months. The expected impact varies from no material change to a marginal decline in the growth rate. To overcome this, businesses that deal with U.S. customers are establishing and maintaining awareness south of the border, adjusting their prices, and reallocating their marketing and promotional dollars.

Edmonton

Edmonton enjoyed a modest, yet healthy, increase in tourism traffic in January through April of 2008. Operators attribute the increase to an upswing in corporate and convention business, increased commercial spending, and more entertainment events. Operators believe that the demand would have been stronger if they had not been facing obstacles such as increasing fuel prices, unfavourable weather, the weakening U.S. dollar, rate increases on tourism products, and ongoing renovations.

Edmonton operators overall expect volume to increase by 10% this summer. Many have already seen an increase in demand through advanced bookings. The warm summer weather, planned tourist activities, and an expected boost in retail shopping will also encourage higher traffic volume. However, due to scheduling changes and fewer special events booked compared to last year, operators are expecting a decline in visitor traffic for events. Overall, operators anticipate a promising summer season for the tourism market in 2008.

Tourism operators believe that the U.S. market may be slower this year because of the high fuel prices, the poor performance of the U.S. dollar and economy, and the potential passport confusion at the border. Also, this year fewer major events are geared towards U.S. travellers.

The overseas tourist market is promising because more direct flights are available and investment in the tourism industry has increased. Specifically, operators predict an increase in demand from Mexico, the United Kingdom and Australia.

Edmonton tourism operators are not as concerned about the potential effects of high fuel costs compared to those businesses outside the city limits. Pre-booking indicates that the local market will be profitable this summer.

Northern Alberta

Business volume in northern Alberta remained relatively steady in the winter months of 2007/2008. Low industrial activity in the area decreased business for some operators. Some businesses created more attractions and events, upgraded their facilities, and marketed at regional tradeshows to successfully increase their corporate business volume. As in 2006 and 2007, corporate and crew demand was strong this year, with hotels experiencing increases in long term occupancy over the winter due to the lack of available housing and patronage from out-of-town construction crews.

Operators have a positive outlook for May and June. Operators have advertised their businesses extensively and with the warmer weather, bookings for summer have started and the number of inquiries has skyrocketed. Operators are optimistic that conventions and corporate business from May to August will equal last year's levels. New attractions, exhibits, and retail businesses are expected to draw more regional tourists and groups during the late summer months. This summer's tourist season is anticipated to be successful because of the continued increase in regional short haul traffic.

It is believed that high fuel costs, economic uncertainty, and unpredictable weather may negatively impact travel to the region. To address the potential impacts, operators are proactively advertising to local and unfulfilled corporate markets. Marketing efforts are being channelled towards areas within a one-hour drive of the operator's business. Travellers are expected to decrease their travel distances to cope with high fuel prices; therefore, the market with the most sales potential is "close to home base."

Increased tourism from Mexico is anticipated because of the additional flights to Alberta. Targeted marketing campaigns in Australia are forecasted to yield results. Operators predict that Germany and the U.K. will continue to be steady markets and a valuable source of business.

Operators are concerned that international visits may be affected by more of those travellers viewing Alberta as an expensive destination. Businesses foresee that tourism from the U.S. will decline, given the instability of the American economy.

The leading concern to northern Alberta operators is the high cost of fuel. Consequently, product price increases are essential to viability. This is perpetuating the view of Alberta as an expensive destination. Lower economic and industrial activity, including a slowdown in forestry and lumber industries, also concerns operators.

The staffing concerns highlighted in 2006 improved in 2007, but remained an issue for northern Alberta operators in 2008. The pool of workers is diminishing as more people accept the perks offered in the energy sector. To effectively compete with the energy sector, compensation packages need to increase, resulting in increased product and service prices. Smaller independent operators with thin profit margins are finding it increasingly difficult to offer competitive working incentives.

South and Central Alberta

South and central Alberta operators experienced a good 2007/2008 winter season. Favourable economic conditions, a strong corporate market, increases in the number of conferences, and new events and attractions, all contributed to high occupancy levels, especially in the southern part of the province. Central Alberta operators cite weather, business strategy and the strong regional economy as positive factors, with “slowed oil crew activity” as the only negative factor. While some reported difficulties hiring seasonal personnel, human resources was not believed to be a major issue in 2008 overall.

Operators hope that the good winter season will lead into a positive summer in 2008. Strong marketing efforts are already starting to generate returns. In southern Alberta, the increasing level of bookings, group reservations, and seniors travel indicate a solid performance for May and June. Operators expect that business levels will accelerate into July and August.

Central Alberta operators predict that occupancy levels this summer will be similar to last year, given advanced bookings, increased marketing, new products, and increased local activity due to the high fuel prices. Operators identify increased competition, uncertainty in the oil and gas sector, the weakening economies in the U.S. and Ontario, border issues, and the elections in the U.S. as possible threats to the industry.

As in previous years, the industry relies on strong demand from regional markets. Since the Alberta economy is strong, Albertans are expected to travel within the province in 2008. Operators believe that short haul markets hold the most potential as gasoline prices rise.

Central Alberta operators note that U.S. customers do not normally generate significant business volume in the region. Increased marketing to local and other international travellers are predicted to offset any potential decrease in demand from the U.S. market. Operators believe that gasoline prices, strong worldwide competition, and expensive prices for food, travel, and accommodation may deter long haul travellers from coming to Alberta.

To take advantage of the new direct international flights to Alberta, operators are initiating strong marketing campaigns to target the “most promising markets”. Central Alberta operators are marketing to areas within Europe, Korea, and Japan. Southern Alberta tourism businesses are marketing to travellers from the Netherlands, U.K., Spain, France, Korea and Mexico. Operators believe the weakened economies of the United States and Asia create “tough” and unattractive markets.

Industry Specific Overview

Campgrounds and RV Parks

Campgrounds and RV park operators are optimistic that their clientele base will change, rather than diminish, due to the downturn in the oil patch and increasing fuel prices. Businesses that are dependent on long haul travel experienced decreases in volume during the 2007-2008 winter season. Businesses that rely on long-term stays had a healthy start to the year due to limited local housing. Southern Alberta operators noticed more 'stop-over' business, particularly to and from the U.S.

Overall, operators have received a large number of inquiries and bookings for the summer and predict an increase of at least 10% compared to last year. This is because of more events, more long-term occupants, and more local travel. Notably, there is heightened interest in seasonal lots as travellers look to reduce costs associated with high fuel prices.

Operators are directing marketing campaigns to the promising markets of New Zealand and Australia. Businesses predict that European tourists will overlook exchange rates and continue to travel to Alberta. More Albertan visitors are expected, as people increasingly camp and travel closer to home due to increased fuel prices.

Generally, operators predict that fuel prices will not have a huge impact on American visitors. Operators believe the primary hindrance to U.S. travel will be the instability of the American economy.

Since last year, the increased cost of travel and fuel are projected to have at least some negative impact on tourism in the summer of 2008. Operators believe that the number of local visitors will dramatically increase as long as tourism operators are effectively marketing to local areas.

Group Tours

In the beginning of 2008, tour companies benefited from ideal ski conditions and the healthy Alberta economy. Tourism operators in Banff noticed an increase in group tours to the Rocky Mountains. As a stopover for many travellers to Alaska, Jasper welcomed numerous tour groups this winter.

Operators in northern and southern Alberta report increased group tour bookings for the summer months. Summer business volume is expected to be either the same or higher than 2007. Businesses anticipate increased demand from the promising markets of Mexico, Europe, New Zealand and from increased inter-provincial travel. Steady demand is expected from group tour markets in Germany and the U.K.

New events, attractions, exhibits and retail businesses have been developed to draw more groups over the summer months. Businesses anticipate that any possible decrease in U.S. visitors may be offset by an increase in domestic group tour visitors. Operators believe that the strong provincial economy will trigger an increase in demand from regional markets.

Attractions and Events

During the winter season of 2007/2008, tourism operators in the attractions and events industry report no change in business volume compared to last year.

Operators believe that the warmer weather, the strong Alberta economy, and increased marketing efforts will keep business volumes healthy during the summer months of 2008. As many attractions and events take place outdoors during the summer months, weather influences much of the success for tourism operators.

Businesses are focusing their marketing campaigns directly towards local tourists. Operators believe that local tourists have more sales potential in the long run compared to tourists from more distant places. Travellers are expected to stay closer to home for future holidays, due to higher gasoline prices. It is believed that local and domestic markets in Alberta, Saskatchewan, and Manitoba will grow.

Attraction and event operators estimate that there will be a 20% increase in demand in 2008 over 2007. Many have already begun booking into the late summer season. Operators are optimistic about the summer. Companies are hesitant to forecast increased volumes beyond summer, due to increasing gasoline prices, a potential for a decrease in the Alberta economy, and difficulty in retaining staff. Concerned about these issues, operators have increased marketing since last year and a few added new events and attractions to their current product/service base to attract more consumers.

As seen throughout the province, operators expect U.S. tourism traffic to decline in the upcoming summer season, due to increasing fuel costs, the weakening American economy, and border regulations. Attraction and event businesses are marketing in Europe and Mexico in hopes that the additional flights added to the roster will create more demand from these markets. Operators also predict increasing tourism from the United Kingdom and Asia.

Tourism operators in the attraction and event segment believe their greatest challenge this year will be to overcome the increasing costs for fuel and advertising. Other issues that may negatively impact their companies include the state of the U.S. economy, the price of food, and the weather. Remaining optimistic, operators hope that local traffic will increase, as tourists prefer to stay closer to home.

Adventure Vacations

Operators in this segment expect a slight decrease in their business volume during the upcoming summer months. However, overall business volume will be similar to last year as indicated by pre-bookings.

Many adventure vacation operators attributed the decrease in demand to the economic instability in the U.S., the upcoming U.S. presidential election, rising gas prices, documentation required at the U.S.-Canada border, and the strong Canadian dollar.

Operators found that obtaining adequate staff, while still a concern, had less impact on their businesses than did economic changes.

Adventure vacation operators believe that the Alberta market is more promising than in previous years because travellers may stay closer to home due to the increased fuel costs. Operators are marketing heavily in Australia, since there is a strong desire in Australia to visit the Canadian Rockies.

APPENDIX A - QUESTIONNAIRE

PRE-SUMMER 2008 ALBERTA TOURISM SURVEY INTERVIEW QUESTIONS

Name of Establishment/Attraction/Business: _____

Name of Contact: _____ Phone Number: () _____

Business Address: _____

Copy of Final Report: Yes: No: If yes, do they prefer to have report sent by email or by Canada Post?

CONTACT PERSON:

Please update any changes on your phone list with the correct information. Please ask respondent if they have about 5 minutes to answer questions related to the summer tourism outlook for their respective business. Please introduce yourself and indicate that you are conducting this survey on behalf of Alberta Tourism, Parks and Recreation. If anyone wishes to verify this, please have him or her call Kristy Hubscher at (780) 415 -1224.

INTRODUCTION:

Purpose: A pre-summer survey of how the tourism industry is expected to perform during the late spring and summer months. Reassure them that we will not be releasing any identifying information. The only information that will be released to the public is a summary of provincial and regional results. Ask respondent if they wish to receive a copy of the final report, and if they do, please confirm mailing address so that a copy may be mailed to them.

NOTE:

This interview schedule is not intended to be read verbatim to the respondent, but please ensure that all questions are asked if they apply to the respondent. This is very important so that we ensure consistency in all the interviews.

Several of the questions noted below are geared to hotel/motel properties and should not be asked of attractions, such as Calaway Park or Fort Edmonton Park. In other words, use your judgement on which of the questions noted below are appropriate for the interview you are conducting. In some instances, during an interview in a specific location you will hear something from an operator, such as "we are receiving many last-minute cancellations from tour operators" or "we seem to have fewer inquiries out of the United States than previous years." Please follow through on comments like this in subsequent interviews with operators in the same location or with similar types of businesses. This helps to determine whether this was just an isolated incident or a more general trend.

Not all questions apply to all operators; please use your judgement.

**PRE-SUMMER 2008 ALBERTA TOURISM SURVEY
INTERVIEW QUESTIONS**

QUESTIONS:

- 1. How has your business fared for the period January through April this year compared to the same period last year? What events in particular have contributed to any change from last year?**
- 2. Based on what you presently know, how does it look like business is shaping up for May and June? For July and August? How does this compare to the same period last year? Do you expect it to be better, worse, or about the same as last summer? (Try to quantify by asking respondent to give a percent change for May and June and then the summer months of July and August).**
- 3. Do any markets look more promising (or worse) than usual? If there are any major changes compared to last year, what would you attribute this to? Specifically, do you predict an increase in demand from any visitor origin during the next four months? What are the prospects for the number of American visitors you expect this summer?**
- 4. Have any events, such as the rising cost of gasoline, the relative strength of the Canadian dollar, or the U.S. slowdown had any impact on your outlook for the next four months? If yes, please elaborate on how your business prospects have been impacted.**
- 5. What single issue do you believe will have the most impact on your business prospects for the coming summer?**
- 6. Any additional comments?**

Thank respondent for taking his/her time to answer these questions and ask if he/she will agree to being contacted again in September to answer a few questions about how well the summer actually performed.