

Pre-Summer 2006
Alberta Tourism Operator Survey

SURVEY REPORT

Prepared for:

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Provincial Overview

The 2006 Pre Summer Alberta Operator Survey, conducted during late April and early May, contacted 127 businesses serving Alberta's tourism industry and 85 businesses participated. Participating businesses included those located in 34 Alberta communities and tour operators in Eastern Canada and the United States.

Alberta operators are optimistic as they launch the 2006 summer season. The province's robust economy contributed to a busy start to the year and reported occupancy is above 2005 levels. This excellent beginning is a trend expected to extend into the summer and fall seasons.

- The first four months of 2006 saw many hotels and motels at or near to full capacity, primarily due to crew and corporate business demand.
- Hotels in Banff and Waterton Lakes National Parks report a mixed early year and visitor numbers are projected to be similar to or slightly above 2005. Strong bookings are forecast for the summer months. Hotels expect to see a stronger regional travel market, offset by fewer American visitors in 2006.
- Jasper had a good winter and is experiencing strong early season demand and fewer cancellations. Most hotels are looking for full or near capacity bookings. More German, Dutch, and Japanese visitors to Jasper are anticipated. American and U.K. travellers are expected in numbers similar to 2005.
- Good ski conditions contributed to a better than average winter season for the Banff corridor properties in Kananaskis and Canmore. Kananaskis skiers appeared in record numbers. Stronger regional traffic will more than offset an expected decrease in the group tour market this summer.
- The Jasper corridor properties, Hinton and Edson, are servicing a robust energy sector demand. Available rooms for tourism may be at premium in 2006.
- Calgary hotels enjoyed a positive winter season. Corporate business is up an average of 10% and that, coupled with events such as the World Figure Skating Championship, contributed to stronger room demand than last year. A continued strong corporate market will see summer occupancy similar to 2005.
- Corporate demand fueled a busy winter season in Edmonton. That strength will continue through May and June, with occupancy levels expected to be 15 – 20% above last year. Even without the business generated by the 2005 World Masters Games, an overall summer occupancy gain of 5% is expected due to continued corporate demand.

Provincial Overview

- Northern Alberta business is dominated by strong energy sector demand. High occupancy is expected throughout the summer.
- South and Central Alberta operators look to a busy summer. Occupancy at most locations should exceed 2005 levels as Albertans are expected to vacation closer to home.
- Campgrounds and RV parks are expecting a strong year. More short haul visitors are expected in 2006 and average stays will be longer. Higher gasoline prices have caused more travellers to book long-term sites.
- Tour business to Alberta should be similar to 2005, which was considered a good year by operators.
- Attraction and event operators are optimistically gearing up for a busy summer.
- Adventure vacation venues expect a slower early summer season and visitor numbers equal to or slightly below 2005. Concern about tourist accommodation availability is given as one reason.
- Room rates in smaller markets are equal to or are slightly above those of 2005. In high demand areas, room rates will be significantly higher.

Alberta operators cited the following risks and concerns that may impact the 2006 and future seasons.

- Gasoline price increases are not a major concern to most operators. Although long haul visitor traffic may be down, it is expected more short haul visitor traffic will compensate for that decrease.
- A downside to the heavy crew and corporate demand is the limited number of rooms that may be available for tourists. One operator identified this phenomenon as a potential long-term problem, and took the initiative to block some rooms strictly for summer visitor purposes.
- Attractions dependent upon off-site accommodation for visitors are concerned. Potential tourist room shortages may negatively impact their operations.
- Staffing is the critical industry issue. In many markets it is difficult to attract and retain employees. Alberta operators now actively recruit in Eastern Canada, the Philippines, Europe, and the Dominican Republic. Staffing in many regions is further complicated by the high cost and scarcity of staff accommodation.

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- The strengthening Canadian dollar may impact visitor levels. Hoteliers mention a potential for fewer American visitors. Closer parity with the U.S. dollar may also cause more Canadians to vacation in the United States.
- Border crossing uncertainty could be a potential barrier to Americans traveling to Alberta. Border security and future passport issues are the concern.
- Tour companies report more North Americans are considering Europe as a long haul destination. Other destinations like Asia are growing in popularity with North American and European travelers.
- The Prince Rupert ferry accident caused cancellation of several Western Canadian tours commencing in British Columbia and ending in Alberta.

Independent Travellers

Banff and Waterton Lakes National Parks

Banff and Waterton Lakes National Parks are true tourist destinations and corporate market influence has a minimal impact on business. In general, tourist business was up this winter, although some respondents report no increases from 2005. Weather and ski conditions have a significant impact on winter business. While ski conditions were generally excellent, the mild winter in other parts of the province may have negatively affected travel to the mountains. Operators enjoying a good ski season made a more aggressive marketing effort than those experiencing only minimal growth.

The majority of surveyed operators believe prospects for May and June are good. That positive outlook continues through the rest of the summer. Enquiries and bookings are generally ahead of 2005 and there is a trend for people to book later or closer to their planned vacation dates. Visitor projections for August are less optimistic than in the early summer months. Group tour visits to Waterton Lakes may be less this summer due to a noticeable trend by seniors to do more fly/drive travel rather than bus tour vacationing.

The buoyant Canadian and Alberta economies are expected to encourage more regional traffic to both National Parks. To date, the rising cost of gasoline has not dampened prospects for a good season. However, there is a concern that the cost of gasoline and the strength of the Canadian dollar will negatively impact the number of American tourists visiting both parks. The strong dollar may also encourage more Canadians to vacation at American destinations. A future concern is that possible implementation of passport requirements will negatively impact the number of American leisure visitors who frequently travel to Alberta.

There is no indication of broad based rate increases. A common concern among operators is the area will price itself out of the market.

As in most areas of the province, labour is a critical issue. The supply of workers, coupled with a shortage of affordable housing opportunities for seasonal employees, compounds the problem. The lack of staff has, in some instances, curtailed hours of operation for food service and even room availability.

Higher park fees are seen as a barrier to vacation travel to the National Parks.

Jasper National Park

Jasper operators enjoyed a successful start to the 2006 season with what was considered a good, but not spectacular first four months. Snow conditions were not the best and in a ski dependent market that was a disappointment. Occupancy levels did generally exceed 2005 with average room rates remaining stable. The higher occupancy levels are attributed to an increase in U.K. and regional travelers, offsetting a decrease in American tourism. There was an increase in the number of regional non-skiing visitors, due to mild winter weather and a prosperous economy.

Summer in Jasper will again be busy. Early season bookings are very promising with strong demand and cancellation rates below 2005 levels. Most properties are looking forward to near or full summer capacity extending into September. 2006 average room rates have risen from 2005, but are not considered an issue by Jasper visitors.

The group tour market is showing early strength. Sixty days out on cancellations, May and June prospects are good. Group bookings are similar to 2005, but with fewer cancellations, which is a very good omen. Some tour business, traditionally using Hinton as a base market, has transferred to Jasper properties in 2006. More German, Dutch, and Japanese travellers are expected, while American and British visitors should appear in similar numbers as 2005.

Gasoline prices are not considered an issue, but rubber tire market travel patterns may be impacted. More short haul visitors and fewer long haul travellers are expected to visit Jasper this year. Higher airline ticket prices, reflecting fuel surcharges, may reduce the number of foreign visitors. The strengthening Canadian dollar is a concern as it affects the competitive pricing of Alberta vacations internationally. The effect of U.S. border security issues is a further concern for Jasper operators.

Labour issues are a challenge, but staffing in the short term appears under control. Most hotels are hiring from Europe and Asia to fill vacancies. Finding suitable staff accommodation is a more pressing issue than staffing.

Jasper respondents are positive about Alberta's new tourism marketing initiative. Parks Canada was praised for becoming more flexible in terms of activities permitted within the National Park.

Banff Park Corridor - Canmore and Kananaskis

Canmore/Kananaskis area hotels experienced mixed results. Some properties had fewer regional visitors in early 2006, resulting from mild weather in many parts of Alberta. Those overall losses were compensated for by a good ski season and greater regional traffic later in the season. Growth in the group tour market was also evident.

Respondents optimistically project increases for May and June and believe higher occupancy will continue through the remainder of the summer. This positive outlook is encouraged by the increased spending ability of regional tourists, resulting from the strong provincial economy and an employed workforce with larger disposable income. Group tour bookings are stronger for the early summer, but mid and late summer booking demand is below 2005. Rising airfares may limit the number of group tours in Alberta. There is some concern about fewer visitors from the U.S. due to high gasoline prices and the increasing strength of the Canadian dollar. Operators are confident increased regional (i.e. Edmonton and Calgary) traffic will more than offset any decreases from the U.S.

Some operators are taking the opportunity to introduce minimal rate increases to offset rising operating costs. Others are maintaining 2005 rate levels to preserve and increase their market share.

Staffing issues are critical for all operators and in some cases limit their ability to provide rooms and service tourists. One hotel reports no problem with line level staffing, but has difficulty finding supervisory staff.

A substantial increase in Internet bookings is reported. Far greater use of booking vehicles such as "Expedia" makes tracking visitor origins more difficult.

Jasper Park Corridor - Hinton and Edson

Area operators report a booming start to the year was. Accommodation demand in both Hinton and Edson was dominated by energy sector business and most hotels report full occupancy. Rates in both markets, while competitive, were higher than in 2005. May and June will also be high occupancy months as a slower spring break up will keep crews in the field longer.

The healthy trend is expected to continue for the remainder of the year in both communities. The downside to the strong oil patch related business is few available rooms are left for the leisure traveller. Tours that in past years had headquartered in Hinton are now moving to Jasper and Valemont B.C. The long-

term implication of the tourism loss is concerning. To service the high demand, new rooms will soon be coming on stream in both centres.

In recognition of a potential tourism loss, the region is taking positive and immediate steps. A “bring your camper” theme has been developed to promote tourism and combat low hotel vacancy and is supported by a new visitor guide. A thirteen member regional group is developing a new tourism strategy to publicize and stimulate travel around the Grand Alberta Trail circular tour. This circular motor tour, commencing in Edmonton, proceeds west through Hinton and north to Grande Prairie before returning through Whitecourt to Edmonton.

Staffing in the robust economy is an issue. Some venues are coping at present with good core staff, but expect trouble should they need to replace people. Others are not so fortunate and are now trying to address staff shortage issues. In all cases, wage rates for hotel staff are high. Scarce and high-priced staff accommodation is a further issue.

Calgary

Calgary hotels enjoyed a positive winter season with high occupancy levels. The general consensus is that overall corporate travel is up 10%. This, coupled with the impact of the World Figure Skating Championship, resulted in occupancy levels above 2005. Strong demand is anticipated through the months of May and June, resulting in an occupancy increase of about 15%. The positive outlook continues through the months of July and August, although not reaching levels attained last year. A number of respondents enjoyed very strong performance in August 2005 and expect it will be difficult to maintain similar strength through August 2006.

Increased expectations lie largely with an exceptionally strong corporate market and indications are it will continue to be so. Tourism sector business is expected to be on par with 2005 and the steady convention business will maintain its pace. Other than the strong economy, there are no other major scheduled events to influence business forecasts for the late spring and early summer months. Room supply has remained relatively constant and is expected to do so until 2008.

Summer room rates will increase to reflect higher operating costs and continued high demand. Many major hotel chains have a comprehensive variable rate structure allowing them to charge in relation to market conditions. Those with more rigid rate structures anticipate some increase. An overall room rate increase of about 10% is expected to be the norm. A number of hotels are renovating and introducing new products to allow them to maximize their rate structure.

None of those surveyed will speculate on the impact of rising gasoline prices. They believe it is too early to measure or predict the impact on tourist travel. The general consensus is that increased costs will not affect the corporate portion of their business. Some respondents do believe higher airfares and a strengthened Canadian dollar will negatively impact the European visitor numbers. Looking to the future, there is concern the passport requirements for American travellers may reduce tourist traffic from the U.S. This is particularly important due to Calgary's reliance on convention business from the U.S.

The availability of a qualified workforce is a major concern to all survey participants. Some respondents have taken a proactive approach to the problem and are actively hiring abroad to fill critical positions.

Edmonton

Edmonton hotels have been positively impacted by the dynamic provincial economy and the strong performance of the energy sector. Overall corporate prosperity has increased demand for a full range of services. On average, occupancy rates for January through April 2006 are 10% higher than for the same period last year. The demand for meeting facilities and related catering services has been brisk as companies take advantage of their own improved performance and prospects for positive business growth.

High demand is anticipated to continue with forecast occupancy increases in the 15%-20% range for the months of May and June. Some locations will benefit directly in relationship to the length of the Edmonton Oilers' Stanley Cup run in the playoffs. While the pace is expected to continue ahead of last year through the months of July and August, some tailing off in the rate of increase to about 5% is expected. This is directly due to the fact hoteliers will be competing against business generated by the World Master Games held in Edmonton in 2005. Those locations benefiting from increased tourist traffic from the Grand Prix of Edmonton in 2005 are expecting similar results this year. No respondents think the name change from Edmonton's Klondike Days to Capital Ex will negatively impact business.

Edmonton hotel rates are reflective of the economic pressures caused by increased costs. Rate increases of 5% -12% will be initiated. Those not anticipating rate movement have a sufficiently flexible rate schedule to allow them to maximize revenue stream according to demand.

Edmonton and area tourism is largely regional in nature drawing on Northern Alberta, Saskatchewan, and British Columbia residents. The majority of respondents believe it is too early to predict the impact of rising gasoline prices on

travel. There is some cross marketing to attract tourists travelling to the Calgary Stampede, but there is no major marketing effort directed to attracting foreign tourists into the area. As a result, such factors as the strength of the Canadian dollar and rising cost of airfares appear to have little effect on foreign travel to the Edmonton market.

The downside of the strong economy is increasing costs and the overall labour shortage. Increased food and labour costs have placed severe pressure on catering margins and resulted in increased menu pricing. Universally, hotels are experiencing a labour shortage, especially for front desk, housekeeping, food services, and retail positions. The shortage of skilled tradespeople is also hampering locations undertaking renovations within their facilities.

Northern Alberta

The first quarter of 2006 in most Northern Alberta venues is characterized as exceptional, and described by operators in terms such as “awesome,” “extreme” and “best ever.” The booming energy sector contributed to nearly full occupancy in northern communities. Occupancy well into the 90% range was the norm, an increase from 2005. Average room rates benefited from the heavy demand and exceeded 2005 levels. Corporate and crew business dominated room rentals with slow periods and weekends being filled by other corporate and group business. Grande Prairie reported reservations not made at least one month in advance resulted in “no room at the inn.” All in all, a great start to the year.

Long-term bookings ensure a similarly busy summer for northern operators. Occupancies in the 80% and 90% ranges will be common and energy sector business remains the prime focus. As an example, one hotel reports that occupancy will be 30% above 2005 and at a significantly higher average room rate.

Servicing leisure travel visitors will be difficult this summer. Available tourism related rooms in Fort McMurray will be filled by the popular Oil Sands Tours, in Grande Prairie by tournament and group travellers, and in Grande Cache by smaller tour groups. Other communities will have some space available for tourism activity in mid summer. Strong general corporate business is also expected by most of those surveyed. An increase in regional short haul leisure traffic caused by higher gasoline prices is expected. The strengthening Canadian dollar, in conjunction with higher fuel prices, may reduce the number of Americans traveling to Alaska.

Properly servicing the high demand is now the concern. Human resources are the critical issue for many of the surveyed properties. Most have successfully

retained core staff, but at a high cost. Increased wage levels and enhanced benefit packages are now common. Low unemployment and high wages in the north make new staff recruitment a dilemma. It is especially difficult to attract housekeeping and kitchen employees at typical service sector wage rates. The competitive hourly wage rate in most communities is \$14 to \$15. As a partial solution, recruitment of offshore workers from the Philippines and Dominican Republic is becoming the norm. Several venues report excellent results. Recruitment in Eastern Canada and the Maritimes is also not uncommon. Hotels with chain affiliation are making use of corporate recruiters. The shortage and high cost of suitable accommodation further compounds staffing problems.

To alleviate room shortages, new properties are coming on stream in many northern communities. For example, in the next 2 years seven new properties will be built in Grande Prairie and two new hotels will shortly come on stream in Peace River. Demand is such, and the feeling is strong that the Northern Alberta accommodation industry will continue to flourish well into the future. One operator so accurately summarized the Northern Alberta market situation as a two edged sword, "Business is booming; human resource issues can't get much worse."

South and Central Alberta

Hotels in south and central Alberta generally experienced a satisfying winter season with business at or slightly above 2005 levels. Properties catering to energy sector workers had occupancies ranging from 70% to 90%, whereas those more geared to traditional business had slightly lower occupancy. Average room rates remained similar to last year. Depending on the market area, increased corporate and leisure business is reported "a pleasant surprise." Family and sports group activity filled weekend rooms in many properties. Southern Alberta respondents noticed fewer American visitors this winter; perhaps a casualty of higher gasoline prices and strengthening Canadian dollar. Alberta's mild winter did encourage more regional traffic.

Most operators are positive and looking to a good summer season exceeding 2005. In Red Deer and surrounding areas bookings are filling in nicely indicating an active summer. Regional visitors represent the majority of room nights with more travellers from Western Canada expected, and the 2006 Alberta Summer Games will further enhance room demand. One hotel reports good shoulder season demand from the U.K., German, and Dutch tourists. Medicine Hat properties expect stronger regional, group, and corporate based markets this summer. Exercises at the Suffield Range will bring increased U.K. military related traffic. Lethbridge hotels anticipate occupancy similar to 2005, with slightly higher average room rates. The common expectation is that regional

traffic will be stronger, U.S. visitor levels similar to 2005, and corporate room rentals will decrease. Smaller communities look to a busier May and June, but mid summer bookings are slow as usual. Most depend on regional traffic, but one property expects to serve more American, U.K., and Australian visitors this year.

The impact of higher gasoline prices is mixed. Some operators believe higher prices will encourage Albertans to vacation closer to home, but others are less confident. The impact of a stronger Canadian dollar is considered negligible, but one respondent was concerned that more Canadians may vacation in the U.S.

Labour scarcity is not as much a concern as in other parts of the Province, but continues to be a challenge. Higher wage rates and incentives paid to retain existing staff reflect the shortage of house keeping and kitchen personnel. The question raised by many is, "If we aggressively market for new business, can that business be properly serviced?"

New properties continue to come on stream in several surveyed markets. Concern expressed by some is that certain markets are becoming overbuilt to the detriment of locating staff and maintaining competitive rate structures. In smaller markets, proactive marketing of local attractions and events is considered paramount. Alberta's tourism marketing initiative is a boon to those markets.

Campgrounds and RV Parks

Milder weather contributed to a busy start to 2006 in winter campgrounds, as several report RV traffic up from previous years. Accommodation shortages in many centres also encouraged greater campground use by the energy sector. Reported price increases primarily covered higher operating costs.

Early bookings bode well for Summer 2006 and optimistic operators expect a busy year. Reservations have been strong and many long-term sites are solidly booked. As in other industry sectors, oil patch demand may restrict the number of camping sites available for tourism purposes. This year campers are booking seasonal sites or increasing the length of their stay as a result of higher gasoline prices. A very positive thing for operators, but short stay sites could be at a premium.

Several operators report a notable increase in repeat business; again, a possible indication that Albertans are planning vacations closer to home. Regional bookings will be high and a stronger Western Canadian visitor demand is evident. A pleasant surprise is increased bookings from American visitors whose vacation plans tie in to the Calgary Stampede. More family holidays will be spent camping in Alberta this year.

Common throughout this survey is the feeling that relatively high gasoline prices will increase short haul travel and decrease the number of long haul visitors to Alberta in 2006. The impact of a stronger dollar is not a major concern, as higher American visitor numbers are expected. A greater concern to several operators is whether the U.S./Canada border remains a friendly place. If not, what will be the future impact to Alberta's tourism sector?

Alberta's new tourism marketing levy is praised as a wonderful bonus and is making a real difference to smaller tourism operators. As it is every year with campgrounds and RV parks, "the best laid plans of mice and men are dictated by the weather."

Group Tours

Alberta continues as a favoured North American travel destination and tour operators are optimistic. Early season tour business is consistent with or slightly below 2005, which was considered a fairly strong year. Fewer Europeans visited Alberta this winter and several custom group tours were cancelled.

Alberta is described by one operator as "a premium destination, always has been, always will be." Summer expectations by most surveyed tour companies are for a good, but not stellar season. Most anticipate tour business similar or marginally ahead of 2005. An early increase in the number of bookings and quotes is reported. Fewer Australian and American visitors are expected in 2006 and Germans should visit Alberta in similar numbers to last year. There is uncertainty regarding U.K. visitor levels, as one company reports the strengthening Canadian currency has forced repricing of tours originating from the U.K. The Prince Rupert ferry sinking has resulted in several western Canadian tour cancellations originating in British Columbia and ending in Alberta.

Higher fuel prices are an issue for tour companies. Diesel price increases required price restructuring for the bus component of many tours. Airline fuel surcharges will add to the travel cost for our out of country visitors. An example given was an additional 100-euro round trip fuel surcharge charged to German passengers. In an already premium priced market, the strong Canadian dollar also negatively impacts tour pricing for foreign travel to Alberta

As in other industry sectors, labour issues are a concern. Companies are having difficulty finding and holding experienced tour drivers. Tour client complaints are now surfacing about the quality of hotel housekeeping, attributed to fewer and less experienced staff. Such complaints poorly reflect Alberta's product quality and are a concern to tour companies.

Western Canada is a highlight in tour packages offered by operators serving international markets. Prices have increased to cover higher hotel, food, and gasoline prices. A caution is our product is considered a higher priced vacation experience in international

markets. One respondent stated “My clients are not price sensitive, but rather, value sensitive and they are still getting value.”

Tour industry dynamics are changing. Fewer people are buying through travel agents as operators are redefining their market to sell directly to groups and associations. Long-haul escorted tours are now a “niche” sell, not a “mass” sell, as in the past. Fewer seniors are taking long haul bus tours. Canada is not a growing market compared to central Europe. Asia is becoming a strong competitor for European vacationers and a small but growing competitor for North Americans. All are important considerations in developing Alberta’s long-term tourism strategy.

Attractions and Events

Alberta attraction and event venues started 2006 on a high note. Fine winter weather, a robust economy, and aggressive marketing produced visitor numbers, in many instances, significantly above 2005 levels. For example, an increase of 23% is reported at one site.

Optimistic operators are heading into summer with positive expectations. Most believe that 2006 will be a busy summer. In a competitive market, operators realize the quality and public appeals of their product is important and have acted accordingly. There will be a wide variety of things to see and do this summer.

Local and regional visitors comprise the majority of attendance at most venues, and an increase in family business is expected in 2006. Larger events express concern about decreasing American visitor levels, a trend evident over the past several years. More Mexican tour group bookings, a slowly growing Chinese market, and more German, Dutch, and U.K. visitors are expected.

Higher gasoline costs are expected to encourage Albertans to stay closer to home, which is a positive prospect for most venue operators. One problem expressed in attracting out of country visitors is the lack of international air traffic into Edmonton.

Staffing is a major problem. Many sites have been fortunate to retain their core staff, but hiring and keeping casual labour is an ongoing concern. Gift shops and food service workers at specialized attractions are especially impacted. Those attractions depending on volunteer help are experiencing difficulty in a high employment economy. Not only are they unable to attract good people, the added wage cost also hurts them financially.

In many instances, attraction and event operators are finding they must redefine their market strategy to target local and regional visitors. Many have also become more active in partnership with other attractions and hotels to increase site awareness and attendance. A city operator identified the lack of urban RV sites as a detriment to attracting the motoring public to city attractions and events.

Adventure Vacations

Alberta's adventure vacation venues generally had a good, but not great winter, with poor snow conditions hampering many winter related activities. The winter season primarily services a regional market.

Bookings for the early summer season are down from 2005. A noticeable decrease in group and convention business is a leading cause given. June is shaping up as a good month and expectations for the rest of the summer are mixed. Operators project summer visitor numbers equal to or slightly below 2005 levels.

The focus of the adventure vacation market is the Alberta regional visitor. The overall U.S. market is soft, but July bookings, in conjunction with the Calgary Stampede, are strong. The strength of the Canadian dollar, relative to the U.S. currency, is given as a reason for soft American visitor numbers. Operators expect more Korean and German visitors, but fewer from the U.K. Increased corporate business bookings will offset lower group and convention business demand.

A big concern to adventure businesses unable to provide on-site accommodation is that crew business dominates accommodation and campground space. There is a need to make more accommodation spaces available to tourists.

Staffing for some in the short term was not a concern, but in the longer term posed significant challenges. Others expressed concern regarding short-term labour supply and quality. One ranch vacation operator advised that although he could hire wranglers, most were inexperienced. Male wranglers were difficult to find, female wranglers not so. One operator reported recruiting in Mexico.

The adventure vacation sector is developing into a destination business and there is an expressed need for tourism groups to do more regional target marketing.

Appendix A

PRE-SUMMER 2006 ALBERTA TOURISM SURVEY INTERVIEW SCHEDULE

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 Economic Development. If anyone wishes to verify this, please have him or her call Sid Nieuwenhuis at (780) 422-1058.

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.

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?**
- 4. Have any events, such as the rising cost of gasoline, the relative strength of the Canadian dollar, or the rising cost of airfares had any impact on your outlook for the next four months? If yes, please elaborate on how your business prospects have been impacted.**
- 5. Do you expect that labour supply issues will have an impact on your business prospects during the next four months? Why or why not?**
- 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.