

LAKE DIEFENBAKER TOURISM DESTINATION AREA PLAN

Appendix I – Tourism Markets

The Visitors

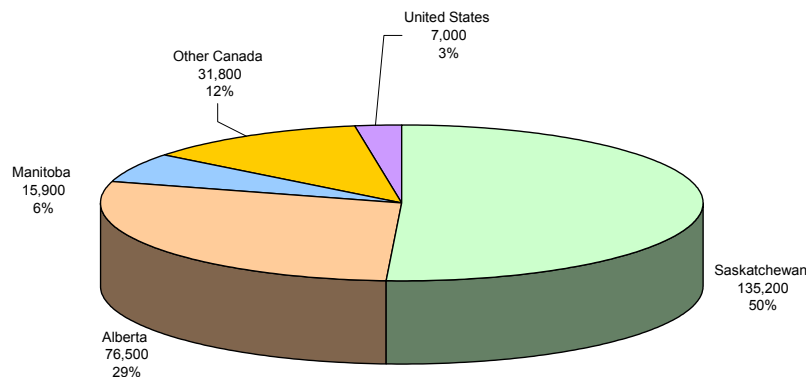
Data from Statistics Canada is not available on areas smaller than a tourism region or Census division. The Lake Diefenbaker Destination Area overlaps the Southwest and the West Central tourism regions (with Craik coming from a third region – the Southeast). As a result all visitor estimates are calculated by Tourism Saskatchewan using data from these two regions as supplied by Statistics Canada.

An estimated 300,000 tourist visits are made to and within the Lake Diefenbaker Destination Area annually. 143,000 of these visits are same day visits where the visitor returns home within 24 hours, primarily Saskatchewan residents. 157,000 are visits of one or more nights in the area. Of these one or more night visits from all origins approximately 14,000 are “passthrough” visits where the visitor stays an average of one night while enroute to another destination. Note that passthrough does not include those who make day stops along the way.

Visitors to the Lake Diefenbaker Destination Area spend an estimated \$41 million in the area. About \$28 million is spent by overnight or longer visitors while same day visitors spend approximately \$13 million.

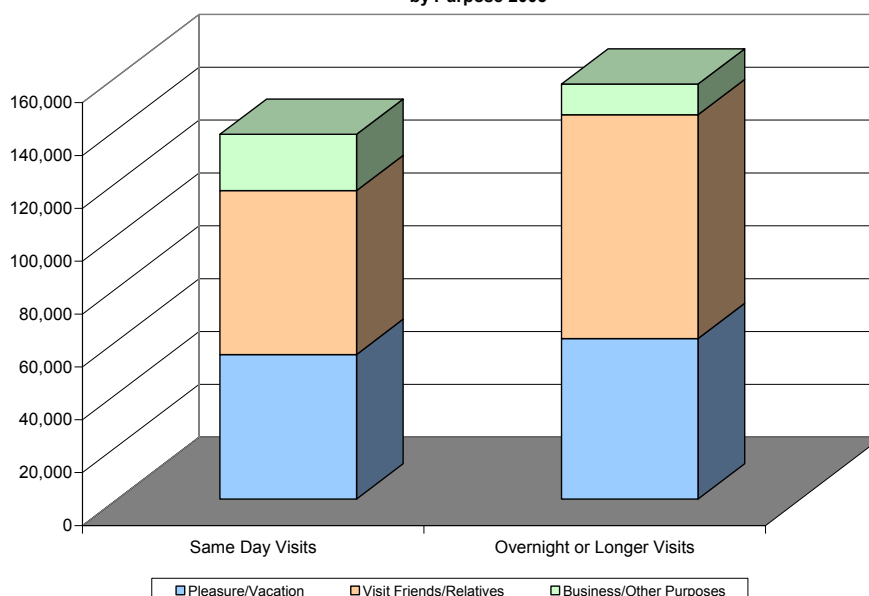
The following graphs and tables show visits to the area by origin, activity and purpose.

Activity Group Participation in Lake Diefenbaker Destination Area by All Visitors



	Same Day Visits	Overnight or Longer Visits
Any Outdoor Activity	23,000	52,000
Fish/Hunt	5,000	10,000
Other Outdoor Activity	17,000	39,000
Any Cultural Activity	20,000	29,700

Same Day & Overnight or Longer Visits to Lake Diefenbaker Destination Area by Purpose 2005



Hunters and Anglers

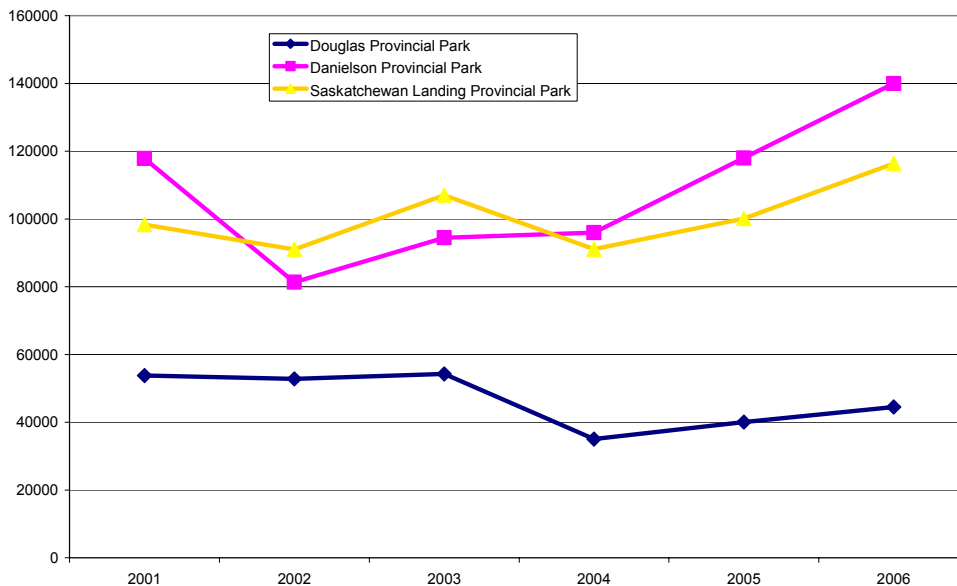
The following estimates were compiled by Tourism Saskatchewan using data from Saskatchewan Environment's 2006 studies on the economic impact of hunting and fishing in Saskatchewan. It is important to note that the Destination Area does not correspond to any of Saskatchewan Environment's zones. The Lake Diefenbaker destination area is not a large drawing area for non-outfitted non-resident hunters capturing less than 2% of those who visit Saskatchewan, but captures about 7.5% of non-resident outfitted hunters. The area accounts for approximately 5,200 resident hunting licenses and 800 or more outfitted American hunting licenses. Those communities which are situated along Highway #11 may capture a larger portion of hunters who are hunting in the east central portion of the province. The majority of resident hunters make day trips only and a significant number will be from within the Destination Area or nearby communities.

The Destination Area captures a very small portion (less than 1%) of non-resident outfitted angling licenses as the majority of American anglers in the area do not use outfitting services. An estimated 9,000 Saskatchewan licenses, 1,600 other Canadian licenses and 1,800 non-resident licenses were used in the destination area in 2004.

Provincial Parks

In 2006 an estimated 44,500 visits were made to Douglas Provincial Park, 140,000 were made to Danielson Provincial Park (many of these day trips) and 116,000 were made to Saskatchewan Landing Provincial Park. The following graph shows visitation to each of these parks for 2001 to 2006.

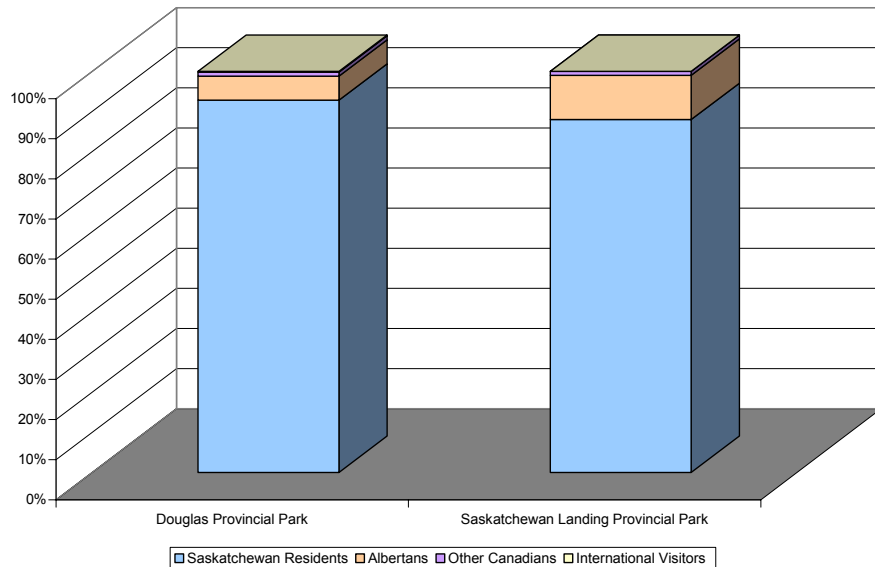
Estimated Total Summer Visits to Douglas, Danielson and Saskatchewan Landing Provincial Parks 2001 to 2006



Note: In 2004 Douglas ceased offering seasonal sites and both Douglas and Saskatchewan Landing began taking reservations and monthly camping permits.

These visits generated 19,129 camping permit days in Saskatchewan Landing, 11,315 in Douglas and 6,878 in Danielson Provincial Parks. A breakdown of camping permits done in 2003 shows the following camping distribution by origin. A number of these percentages may have shifted to a higher ratio of Albertans between 2003 and 2006. This data is not available for Danielson Provincial Park.

Camping Permit Days in Douglas and Saskatchewan Landing Provincial Parks
by Origin 2003



Over the past five to ten years there has been a shift in the origin of visitors to parks on the west side of the province with Alberta visitors becoming an increasingly larger component of these visits. As of 2003, 42% of camping days on the Saskatchewan side of Cypress Hills Interprovincial Park were made by Albertans as compared to 25% in the late 1990s. This trend is expected in the Lake Diefenbaker parks as well, especially Saskatchewan Landing.

The Markets

Canadian Vacationers

Those in the three western-most provinces are the most likely Canadians to have taken at least one overnight out-of-town trip in a two year period with over 90% of Albertans and 88% of Saskatchewan and BC residents having done so.

Saskatchewan captured 11% of total Canadian trips and 8% of Canadian pleasure or vacation trips in the two year period of 2004 and 2005.

No single activity is a main trip motivator for more than 50% of the travelers who did that activity while on a trip indicating that Canadians seek a variety of activities on their trips. However, water-based activities as a group have the highest ratio of trip motivators. The top individual activity trip motivators were: sunbathing or sitting on a beach, visiting a national or provincial park, camping and fishing.

While cultural activities are less likely to have motivated trips, Canadians participate in a number at a high level. Forty-three percent took in some form of performing arts (such as a concert), 43% attended a festival or fair, 57% went to a museum, historical site, art gallery or natural wonder, and 54% took advantage of some other type of recreational activity such as going to a casino or the movies.

Thirty-nine percent of Canadian travelers camped on at least one trip. Choices of shelter included tents, trailers/5th Wheel, motorhomes or RVs, and for a smaller group truck campers and vans and tent trailers.

Twenty-one percent (4.5 million) of Canadians had stayed at a lakeside or riverside resort, 6% (1.2 million) at a health spa, 3% (600,000) at a farm or guest ranch, 1% (300,000) on a houseboat, 25% (5.2 million) in a public campground and 18% (3.7 million) in a private campground. The incidence of camping and RV ownership is higher in the western provinces than in the rest of Canada.

Main sources of trip planning information in descending order of use are: the internet, friends and family, past experience with a destination, travel agents, maps, official provincial travel guides, visitor centres and newspaper or magazine articles.

Forty-four percent of Canadians start their planning with a destination in mind, 21% start with a vacation experience (such as a family vacation) in mind and 12% start by thinking of a specific activity they wish to pursue.

Primary destination motivators are: feeling safe at the destination, no health concerns at the destination, lots for adults to see and do and information available on the internet. Almost one in four also looks for low-cost travel packages although this factor is more prevalent for those planning trips outside Canada than in the country.

American Hunters

Four percent (9.2 million) of American adults had taken at least one overnight out-of-town trip on which they hunted in 2004 and 2005. Of these hunters 73% reported that hunting was the main motivator for at least one trip. Nineteen percent had taken a trip to Canada in the same two year period (5% higher than the average American pleasure traveler).

Of the 9.2 million hunters, 6.4 million are big game hunters and 3.4 million are bird hunters. Although in sheer volumes more hunters are found in the East North Central, West South Central and South Atlantic states, as a percentage of both travelers and population the highest hunter ratios are found in the West North Central and Mountain states, especially North Dakota (19%), South Dakota (18%), Montana (19%), Wyoming (20%), Idaho (18%) Minnesota (11%), and Wisconsin (12%).

Seventy-five percent of hunters are male, 65% are between the ages of 25 and 54, 79% are married and 77% have a post-secondary education (with 50% holding university degrees). Their average household income is \$78,850 US.

One point seven percent (1.7%) have visited Saskatchewan in 2004 and 2005, more than three times the ratio of average pleasure travelers.

Hunters on trips in the past two years had also fished (63%), viewed wildlife (43%), participated in boating and swimming (42%), hiked, climbed or paddled (33%) and participated in snowmobiling or ATVing (30%). They also show interest in shopping and dining (75%), visiting historical sites, museums and art galleries (51%), attending festivals and fairs (49%) and casinos (49%), although these activities may well have occurred on non-hunting trips.

While on trips, hunters showed a preference for staying in public campgrounds (49%), private campgrounds (30%), lakeside and riverside resorts (29%), wilderness lodges (15%) and farms or guest ranches (11%). It is important to note however that this question did not include hotels and motels.