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## Forecasting Parameters for Expo '86 in Vancouver, B.C.

Harrison Price Company

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FORECASTING PARAMETERS FOR  
EXPO 86 IN VANCOUVER, B.C.

December 2, 1984

Prepared by Harrison A. Price

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4.46  
4.2

Table 1  
POPULATION BY MILEAGE RINGS  
(Millions)

	City	Miles			Total
		0-50	50-100	100-150	
1962	Seattle	1.511	0.949	2.000	4.460
1967	Montreal	3.200	1.100	2.100	6.400
1968	San Antonio	0.950	0.553	0.917	2.420
1974	Spokane	0.386	0.238	0.342	0.966
1982	Knoxville	0.906	1.880	4.674	7.460
1984	New Orleans	1.547	1.604	1.859	5.010
1986	Vancouver	1.200	1.295	2.630	5.125

Source: Harrison Price Company.

Table 2

RESIDENT MARKET  
ESTIMATED FAIR ATTENDANCE BY  
MILEAGE RINGS  
(Millions)

6.687

	City	Miles			Total
		0-50	50-100	100-150	
1962	Seattle	4.170	0.977	1.540	6.687
1967	Montreal	15.050	1.230	1.320	17.600
1968	San Antonio	1.834	0.332	0.376	2.542
1974	Spokane	2.177	0.336	0.363	2.876
1982	Knoxville	1.607	0.476	0.374	2.457
1984	New Orleans	2.322	0.734	0.551	3.607
<hr/>					
1986	Vancouver (12.5M)	1.200 <u>350%</u> 4.200	1.295 <u>110%</u> 1.425	2.630 <u>52%</u> 1.375	5.125 <u>137%</u> 7.000
1986	Vancouver (14.0M)	<u>400%</u> 4.800	<u>113%</u> 1.623	<u>60%</u> 1.577	<u>155%</u> 8.000

Source: Harrison Price Company.

Table 3

ESTIMATED FAIR ATTENDANCE FROM  
BEYOND 150 MILES AND TOTAL  
(Millions)

	City	Attendance		
		Beyond 150 Miles	Resident	Total
1962	Seattle	2.913	6.687	9.600
1967	Montreal	32.700	17.600	50.300
1968	San Antonio	3.758	2.542	6.300
1974	Spokane	2.830	2.876	5.706
1982	Knoxville	7.843	2.457	10.300
1984	New Orleans	3.755	3.607	7.362
1986	Vancouver (12.5M)	5.500	7.000	12.500
1986	Vancouver (14.0M)	6.000	8.000	14.000

2.45

Source: Harrison Price Company.

Table 4

ESTIMATED AVAILABLE TOURISM WITHIN 150 MILES OF  
DESTINATION AT TIME OF FAIR  
AND MARKET PENETRATION  
(Millions)

	<u>City</u>	<u>Estimated Available Tourist Market (Millions)</u>	<u>Non-Resident Attendance (Millions)</u>	<u>Penetration (Percent)</u>
1962	Seattle	5.000	2.913	58.3
1967	Montreal	18.200	32.700	179.7
1968	San Antonio	4.500	3.758	83.5
1974	Spokane	3.800	2.830	60.1
1982	Knoxville	6.000	7.843	130.7
1984	New Orleans	5.200	3.755	72.2
<hr/>				
1986	Vancouver (17.5M)	5.857	5.500	93.7
1986	Vancouver (14.0M)	5.857	6.000	102.5

Handwritten calculations:

$$\begin{array}{r} 5.20 \\ 5.01 \\ \hline 10.21 \end{array}$$

$$\begin{array}{r} 7.46 \\ 5.20 \\ \hline 12.66 \end{array}$$

$$\begin{array}{r} 4.90 \\ 3.61 \\ \hline 8.51 \end{array}$$

$$\begin{array}{r} 966 \\ 38 \\ \hline 4.77 \end{array}$$

Source: Harrison Price Company.

Table 5

**ATTENDANCE TO POPULATION RATIOS  
MARKET PENETRATIONS BY  
MILEAGE SEGMENT  
(Percent)**

<b>Fair</b>	<b>Distance Segment in Miles</b>				<b>Non- Resident</b>
	<b>0-50</b>	<b>50-100</b>	<b>100-150</b>	<b>Total</b>	
1962 Seattle	276	103	77	150	58
1967 Montreal	470	112	63	275	180
1968 San Antonio	193	30	18	105	84
1974 Spokane	564	141	106	298	60
1982 Knoxville	177	25	8	33	131
1984 New Orleans	150	46	30	72	72
1986 Vancouver (12.5M)	350	110	52	137	94
1986 Vancouver (14.0M)	400	113	60	155	102

Source: Harrison Price Company.

Table 6

WEAKNESSES IN NEW ORLEANS

- 50%    o    Image - Press relations a disaster
  - City relations a disaster
  - "Carpet Beggar" reception of top management not over-come in City and press areas
- o    Marketing, lateness and quality of staff dealing with BIE, exhibitors (foreign), exhibitors (industrial), consumer marketing, and promotion/advertising.
- o    Overruns and under capitalization
  - 40 million overrun
- 50%       - Impact on marketing (cutback to inadequate levels)
- o    Knoxville impact
  - Too close
  - Domestic, international and federal exhibitors attitudes soured.
- o    Priced out local market
  - Priced out passport
  - Priced out family for repeat visitation

Source: Harrison Price Company.



Table 7

HARRISON A. PRICE TRACK RECORD ON  
EXPOSITION FORECASTING

<u>Fair</u>		<u>Pro Forma Pre-Fair HAP Estimate (Millions)</u>	<u>Actual (Millions)</u>	<u>Error (Percent)</u>
Seattle 1962		1960 7.0	10.2	+46
	Revised	1961 10.0	10.2	+2
Montreal 1967		1965 30.0	50.3	+68
San Antonio 1968		1966 5.5	6.3	+15
Spokane 1974		1972 4.7	5.7	+21
Knoxville 1982		1981 10.3	10.3	0
New Orleans		1981 11.0	7.4	-49
Disneyland 1955		1953 2.5-3.0	4.9	+63-96
Disneyland 1969		1965 7.0	10.6	+51

Source: Harrison Price Company.

Table 8

EFFECT OF DISTANCE AND PERCENT OF  
ATTENDANCE AT MONTREAL AND MARKET PENETRATION

Distance (Miles)	Attendance Percentage				Cumulative (%)
	Canada (%)	U.S. (%)	Outside Canada & US (%)	Total Segment (%)	
0-10	27	--	--	27	27
10-200	5	3	--	8	35
200-400	11	19	--	30	65
400-800	2	14	--	16	81
800-1,600	3	6	--	9	90
Over 1,600	3	3	4	10	100

Distance (Miles)	Market Penetrations			
	Canada (%)	U.S. (%)	Outside Canada & US (%)	Total Segment (%)
0-10	618	--	--	618
10-200	74	54	--	65
200-400	81	22	--	30
400-800	43	19	--	20
800-1,600	71	5	--	7
Over 1,600	42	3	NA	5

Source: Harrison Price Company.

Table 9

**ESTIMATE OF EXPO 86 AVAILABLE TOURISM  
AND NON-RESIDENT VISITATION RANGES**

1. 1977 Tourism in person overnight trips to BC (millions)	10.725
2. Ditto 1982	11.480
3. Growth rate 1977-1982 is 1.3 percent per year	
4. For 1982-1986 assume 1.3 percent growth per year or 1.053 or 1986 is	12.088
5. SWBC gets 51 percent or	6.165
6. Season adjustment is 75 percent	4.624
7. Fair kicker is 20 percent of 6.165 or	1.233
8. Total available tourism is 1.233 + 4.624 or	5.857

Tourist Visitation at Expo	<u>Percent Penetration</u>	<u>Non- Resident Attendance (millions)</u>
on Montreal Standard	180	10.5
Knoxville Standard	131	7.7
San Antonio Standard	84	4.9
New Orleans Standard	72	4.2
Spokane Standard	60	3.5
Seattle Standard	58	3.4
<hr/>		
Vancouver 86 (12.5M)	94	5.5
Vancouver 86 (14.0M)	103	6.0

Source: Harrison Price Company.

Table 10

ESTIMATE OF EXPO 86 AVAILABLE  
RESIDENT MARKET VISITATION RANGES

Popula- tion Segment	1986 BC & US Population (millions)	Forecast Model					
		Seattle 1962	Montreal 1967	San Antonio 1968	Spokane 1974	Knoxville 1982	New Orleans 1984
0-50	1.200	3.312	5.640	2.316	6.768	2.124	1.800
50-100	1.295	1.334	1.450	0.389	1.826	0.324	0.596
100-150	<u>2.630</u>	<u>2.025</u>	<u>1.657</u>	<u>0.473</u>	<u>0.279</u>	<u>0.210</u>	<u>0.789</u>
Total	5.125	6.671	8.747	3.178	12.051	2.658	3.185

Source: Harrison Price Company.

Table 11

RANKED TOTAL ATTENDANCE  
BY PRIOR STANDARDS  
(Millions)

Model	ATTENDANCE IN VANCOUVER		Total
	Non-Resident Attendance	Resident Attendance	
New Orleans 1984	4.2	3.2	7.4
San Antonio 1968	4.9	3.2	8.1
Seattle 1962	3.4	6.7	10.1
Knoxville 1984	7.7	2.7	10.4
Spokane 1974	3.5	12.1	15.6
Montreal 1967	10.5	8.7	19.2
Vancouver 1986 (12.5M)	5.5	7.0	12.5
Vancouver 1986 (14.0M)	6.0	8.0	14.0

Source: Harrison Price Company.

Table 12

HARRISON PRICE COMPANY ESTIMATE  
OF EXPO ATTENDANCE  
(Millions)

	<u>Low</u>	<u>Probable</u>	<u>High</u>
Visitor Attendance	5.0	5.5	6.0
Resident Attendance	<u>6.0</u>	<u>7.0</u>	<u>8.0</u>
Total	11.0	12.5	14.0

Table 13

**MARKETING STRATEGY BASED ON LARGE  
SCALE TOUR CHARTER MOVEMENTS  
ATTENDANCE POTENTIAL BY AREA**

WEST TO EAST			
B. C.	ALBERTA	SASKACHEWAN	REST OF CANADA
Pop. 2.9 ML Aggregate Mkt. Pen.= 137% Att.= 3.973 ML	Pop. 2.4 ML Eq. Mkt. Pen. in Montreal = 81% USE 61% Att.= 1.464 ML	Pop. 1.0 ML Eq. Mkt. Pen. in Montreal = 43% USE 31% Att.= 0.320 ML	Pop. Eq. Mkt. Pen. in Montreal = 57% USE 19% Att.= 3.629 ML
WASHINGTON	WEST OF MISSISSIPPI RIVER		EAST OF MISSISSIPPI RIVER
Pop. 4.3 ML Pen. 48% Att.= 2.079 ML	Pop. 46.1 ML Montreal Mkt. Penetration 3% at this distance USE 1.0% Att.= 0.461 ML		Pop. 156.4 ML Montreal Mkt. Penetration 3% at this distance USE 0.5% Att.= 0.782 ML
OREGON			
Pop. 2.7 ML Equiv. Montreal Market Pen. 22% USE 15% Att.= 0.405 ML			
CALIFORNIA			
Pop. 25.1 ML Equiv. Montreal Market Pen. 5% USE 4% Att.= 1.004 ML			

**SUMMARY OF ATTENDANCE BY AREA:**

British Columbia	3.973
Canada West-East	<u>5.413</u>
Total Canada	9.386
U. S. North to South	3.488
U. S. West of Mississippi River	0.461
U. S. East of Mississippi River	<u>0.782</u>
Total U. S.	4.731
Total	14.117