

MARKET POTENTIAL FOR DUTCH TRAVELLERS TO VISIT ALBERTA, CANADA

MAIN REPORT

MARE Research team: Kimm Scholten & Liesbeth Gerritsen
Client: Alberta Tourism, Parks and Recreation and Travel Alberta
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CREATIVE WAYS TO SOLID DECISIONS



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EXECUTIVE SUMMARY

Trends

- Travel trade organizations observe the following trends in the needs and behaviour of today's travellers:
 - Travellers have more knowledge, experience and independence in travelling. Today's travellers are far better informed and knowledgeable about potential holiday destinations, mostly due to increasing use of the internet. Dutch travellers also seem to have become more experienced in travelling abroad/overseas and as a result have become more self-confident in travelling. They have become more daring in both their choice of destination and their travel behaviour
 - A shift in type of holiday: a higher demand for 'experience', adventure, exclusiveness. Travellers today want more than just a mainstream vacation, they want an 'experience': a 'taste of how people live at their destination'
 - Travellers have a greater need for freedom, individuality & tailored trips: Travellers are less willing to completely tie themselves down in advance and they are shifting from group tours to tailored trips
 - Role of media exposure in increasing demand for a specific destination: the more exposure a country has in the media, the more interested travellers are in visiting that country.
- The observed trends have possible consequences for the approach, travel products and role of travel trade organizations:
 - Travel trade organizations need new targeting methods and communication channels in order to reach their target groups since the needs of the target groups are less clear-cut and the target groups are more difficult to divide into segments today than they were in the past
 - Travel trade organizations need to adapt to the continuing increase in use of the internet. Booking a holiday via the internet is preferred in all three life stage groups. The role of the travel trade organization as advisor is shifting. The increased knowledge levels of today's consumers (and their ability to book independently) are forcing the travel trade organizations into the role of facilitator
 - Travel trade organizations need to adapt to changing demand by diversifying their products and offering a larger range of tailored products.
 - Travel organizations are changing their products to adapt to the higher need for more special, exclusive, 'experience' trips and are also adapting their offering to exploit media exposure received by certain destinations.

Booking, information gathering and information sources

- Dutch travellers go through an intensive information gathering process prior to their holiday outside Europe and use multiple sources to gather information on their destination. Decisions regarding holidays outside Europe are not impulsive: most travellers book 2 to 6 months in advance
- Several sources are consulted for information: Internet, travel agencies, family & friends, television programmes, travel fairs ('vakantiebeurs'), travel books and the Canadian embassy
- Word of mouth plays the role of key influencer at different stages in the information gathering and decision-making process for holiday destinations. Word of mouth is also integrated into almost every other source of information on holiday destinations. To clarify: the word of mouth influence is found in the personal experience of travel TV programme hosts, in personal reviews on the Internet and in personal experiences written up in magazines and books, often with photographs, but also in the first-hand experiences of friends, family and travel agency employees
- The internet and travel agencies are considered the most important sources of information. The internet provides very extensive information on a wide variety of subjects and is always available (allowing travellers to gather information whenever they want it). Travel agencies offer brochures, guides and personal advice. All three life stage groups prefer to book their holiday via the internet
- Over 80% of the members in all three life stage groups who book their holiday outside Europe via a travel agency do so at a travel agency with a broad offer of products (non-specialized). The Dutch often visit a non-specialized agency when they have not yet chosen a destination. Once they have chosen a destination, they are more likely to visit a specialized travel agency
- Travel agencies (when the destination is undecided), travel programmes on television and travel fairs play an important role in triggering initial interest for a destination
- The Dutch prefer to receive information in Dutch.

Decision-making process and planning behaviour for Alberta

- Most Dutch travellers do not consciously choose Alberta as a destination because awareness of Canada and its provinces is low in the Netherlands. Dutch travellers more or less 'discover' Alberta at the end of the decision-making process. Initial interest is often aroused for Canada in general. After gathering information on Canada and the possibilities it offers, the traveller discovers Alberta as a part of Western Canada and 'home of the Rockies'
- The extent to which the Dutch plan their trip, i.e. the extent to which they do or do not book accommodation, excursions and

other parts of their itinerary in advance, varies per country, based on the country's 'score' for items such as accessibility, safety, language and infrastructure quality (roads, accommodation, public transport, etc.)

- Because Canada scores high for the items mentioned above, it is well suited for travelling with an 'open' itinerary. Dutch travellers who have visited Canada describe themselves as adventurous (which means that they leave certain parts of their itinerary open, primarily accommodation and activities), but they are actually rather 'safe' travellers in that the route that they travel and the time that they spend at places along that route is generally fixed. When travelling independently by car or camper, they are free to move around more impulsively and stay an extra day at a given location, for instance. During the high season in Canada, however, they have less freedom to be impulsive and adventurous because hotels and campsites are fully booked.

Perception of Canada and Alberta, travel motivation & travel behaviour

Perception:

- The lack of awareness of Alberta automatically results in a relatively blank image of Alberta amongst Dutch travellers. They do not have a clear perception of the province. Their perception is often based (and therefore limited) on the general perception they have of Canada as a whole (Alberta=Canada).
- Consumers know Canada as a country, but do not have a detailed image of the country. Their image is largely limited to nature and wildlife. Moreover, Canada's image is a bit dull and stuffy
- Alberta exceeded the expectations of Dutch travellers who have actually visited the province. The main perceived strengths of Alberta are the Rocky Mountains and Alberta's beautiful national parks and wildlife
- Alberta is sometimes also perceived as a bit boring. Boring in this context means quiet, limited diversity in landscapes (note: most respondents only experienced the Rocky Mountains) and lack of vibrant cities and entertainment.

Consumer knowledge:

- Dutch travellers go through an intensive information gathering process before embarking on a trip to (Western) Canada. However, even Dutch travellers who have actually been to Canada lack specific and detailed knowledge of Alberta. Their visit to Alberta did teach them that there is more to do in Alberta than they were aware of in advance. Unfortunately, often it was impossible for them to fit the activities that they discovered while in Alberta into their itineraries.

Travel trade knowledge:

- Travel trade experts are knowledgeable about Canada and Alberta, but employees at lower levels in the travel trade organizations, including the employees who actually sell holidays at the physical agency outlets and by telephone, are probably not as knowledgeable. We expect these employees also to lack first-hand experience of Canada and Alberta.

Motivations:

- The motivations for choosing Alberta and Western Canada are similar: need for nature and wildlife, rest & relaxation, peace & quiet, safety, adventure (visiting unknown territory), visits to friends and family, presence of friendly and helpful people
- A motivation that is specific to Alberta is the Rocky Mountains.

Travel behaviour:

- Most Dutch travellers combine a trip to Alberta with a visit to British Columbia and/or a visit to the United States
- The visit to Alberta itself is often limited to the Rocky Mountains and Alberta's national parks. The importance of nature in drawing Dutch tourists is also apparent in the other locations that Dutch travellers visit in Alberta: Jasper, Lake Louise and Banff. The Dutch traveller rarely goes any farther south or east than Calgary or farther north or east than Edmonton.

Perceived target group for Alberta

- According to the experts, Alberta attracts relatively high-income travellers, who enjoy nature and outdoor activities in which their need for peace and quiet is fulfilled. In terms of demographics, the largest group of visitors to Canada and Alberta today consists of Mature Families. The members of this life stage group have more spare time and are therefore able to take longer holidays than members of the Young Adults and Young Families life stage groups.
- Alberta also attracts couples aged 30+ without children and Young Families with children aged 8 – 15 years.

Interest (potential) in Alberta as a vacation destination

- The interest of Dutch tourists in Canada in general and Alberta in particular has been stable over the last few years. In general, interest in British Columbia has been higher than interest in Alberta because awareness of British Columbia is higher
- The experts have two divergent expectations regarding the future level of interest in Alberta as a vacation destination. On one hand, they expect interest to decline due to the stronger position of the US in the tourism industry (low US dollar), decreased contact between the Dutch and their Canadian relatives and the decreased number of

direct flights to Alberta. On the other hand, they expect interest to increase if awareness of Canada and Alberta increases

- Intention to visit the Canadian Rocky Mountains is much higher than the intention to visit Alberta. This results in a higher calculated potential for the Canadian Rocky Mountains than for Alberta and also shows that the Dutch are unaware of the fact that the Rocky Mountains are in Alberta
- The calculated potential is highest for the Mature Family group and lowest for the Young Family group
- Dutch travellers who have been to Alberta are interested in visiting Alberta again. They would like to show Alberta to others, experience Alberta with others and see parts of Alberta that they missed during their first holiday in Alberta.

Travel Alberta

Awareness:

- Like awareness of Alberta, awareness of Travel Alberta is very low. Without prompting, respondents who were aware of Travel Alberta were unable to recall Travel Alberta's slogan.

Website:

- Although the respondents were positive about the Travel Alberta website (www.travelalberta.nl), the website had little impact on the image of Alberta as a holiday destination. Most of the respondents still saw Alberta as a bit 'boring' or 'corny' after seeing the website. The overall look and feel of the website, the logo and the photographs make a somewhat old-fashioned impression, thus adding to the dullness and corniness of Alberta's image.

Training video:

- The training video is not considered representative of Alberta. It lacks the quiet feel that Dutch travellers associate with Alberta and that is the main driver for visits to Alberta. The image of Alberta portrayed in the video does not fit the needs that most travellers expect Alberta to meet when they select it as a holiday destination (i.e. the need for nature and wildlife and the need for rest, relaxation and peace & quiet)
- The relative amount of attention given to the different aspects of Alberta is perceived as off balance: too much focus on cities, events and entertainment and activities such as rodeos and cowboys and too little focus on nature, villages and rest & relaxation. However, the fact that the video shows the diversity that Alberta offers is seen as positive.

Promoting Alberta:

- Overall, the experts (particularly Canada specialists) show a willingness to invest in Alberta as a destination, but they also see barriers and are resistant to the idea of promoting Alberta as a destination on its own. Not only do Dutch travellers want to combine a trip to Alberta with British Columbia, British Columbia also adds value, since it offers more variety to tourists than Alberta. British Columbia compensates for the perceived lack of vibrant cities in Alberta with Vancouver and adds more variety in nature with the presence of Vancouver Island and the coast
- All of the representatives are unhappy about the departure of the Canadian Tourism Commission (CTC) ('verkeersbureau') from the Netherlands several years ago. Some miss it as a source of information, for both themselves and their customers. Many see the departure of the CTC as a reflection of the general lack of attention for Canada. This appears to result in higher expectations for Travel Alberta. Travel trade experts feel that Travel Alberta should compensate for the departure of the CTC and Travel Alberta should be more active in promoting Canada in the Netherlands

- Canada and Alberta are not very visible in the Netherlands and are therefore not a top of mind vacation destinations considered by consumers. Travel trade organizations want Travel Alberta to give priority to raising consumer awareness of and interest in (Western) Canada
- Travel trade organizations also feel that Travel Alberta can make improvements in what it offers the travel trade organizations. Most of the suggested improvements relate to offering the support that is needed to 'get Canada back on the map' in the Netherlands.

Media behaviour

- The most popular TV channels with all three life stage groups are RTL 4, Nederland 1 and SBS6. The three life stage groups watch the news, current affairs programs, documentaries and 'educational' programs. They also watch travel and nature programs. These programs are particularly popular with Mature Families
- The most popular radio stations are Radio 538, Sky radio, 3Fm and Q-music
- All three life stage groups read women's magazines and regional dailies. The free newspapers 'Metro' and 'Spits', which are distributed in metro and train stations throughout the Netherlands, are particularly popular with Young Adults
- The internet is used for many different things, the most important being e-mail, banking and search engines (such as Google).

1. METHODOLOGY

1.1 Background

Travel Alberta is moving from a sole focus on best-producing markets to a focus that also includes secondary markets and emerging markets. The Netherlands is a secondary tourism market in Europe for Alberta, ranking behind the primary markets of the United Kingdom and Germany.

At present there is limited travel research available pertaining to the Netherlands travel market to Alberta and Canada. Travel Alberta and Alberta Tourism, Parks and Recreation have identified the need to undertake research to better understand the travel characteristics and travel motivators of the Dutch market. The research will encompass both the travel trade and consumers.

1.2 Overall research objectives

The overall objective of this study is to gain insight into:

- The size of the travelling population within the Netherlands to travel to Alberta or Western Canada
- The potential of the travelling population within the Netherlands
- How best to reach the travelling population within the Netherlands

With these insights it will be possible to develop an effective marketing program and to determine whether additional investment in marketing initiatives has the potential to generate more visits by Dutch travellers to Alberta.

To gain the richest possible insights and to fulfil the research objectives, a three-phase study was set up. The phases were as follows:

- Phase 1, in-depth personal interviews with travel trade representatives
- Phase 2, online quantitative survey with three Dutch consumer life stage profiles
- Phase 3, two qualitative focus group discussions with Dutch consumers

This report describes the overall findings from phase 1, 2 and 3.

1.2.1 Research objectives

The objectives of this study are:

- To determine the size of the Dutch travelling population
- To determine the potential of the Dutch travelling population (projected growth rate)
- To determine what the most effective channels are for reaching the travelling population within the Netherlands

1.3 Research methodology

1.3.1 Phase 1

For phase 1, 15 in-depth interviews were conducted with key travel trade representatives in the Netherlands. The interviews lasted 90 minutes. Most of the travel trade representatives were presidents or product managers in their respective organizations. All interviews were held on-site at the offices of the representatives.

1.3.2 Phase 2

For phase 2, an online questionnaire was filled in by respondents drawn from a large representative panel (Invotes). The interviews were conducted using Computer Aided Web Interviewing (CAWI). The research life stage groups are:

1. Young Adults: households made up of one or more people all aged 18-35, without children. In this group, 346 net interviews were completed.
2. Young Families: households made up of more than one person aged 25-49, with at least one child under the age of 18 living at home full time. In this group, 341 net interviews were completed.
3. Mature Families: households made up of one or more people, all aged 50-74, with no children living at home. In this group, 342 net interviews were completed.

In total, 1,029 interviews were completed (48% male and 52% female).

The questionnaire is included in the Appendix.

1.3.3 Phase 3

For phase 3, two focus groups were conducted with Dutch consumers who have visited Alberta or the Canadian Rockies in the past five years. Each focus group lasted 120 minutes and was held at the MARE Research offices. One focus group consisted of members of the Young

Family life stage group and one consisted of members of the Mature Family life stage group.

The guidelines and questionnaire used for the interviews and online survey were drawn up by MARE Research and approved by Alberta Tourism, Parks and Recreation.

2. OBSERVED TRENDS IN TRAVEL BEHAVIOUR

2.1 Observed trends in general

From the travel trade experts, we learned that the needs and behaviour of today's travellers are changing. Travel trade experts observe the following trends:

1. More knowledge, experience and independence in travelling
2. A shift in type of holiday: a higher demand for 'experience', adventure, exclusiveness
3. A greater need for freedom, individuality & tailored trips
4. Role of media exposure in increasing demand for a specific destination

These four general trends are described in detail below.

2.1.1 More knowledge, experience and independence in travelling

One of the observed changes is that today's travellers are more knowledgeable and independent, have more experience in organizing their holiday, and understand how to behave during their holiday.

Increases in the use of the Internet over the past few years play a very important role in this trend. The Internet provides tourists with an extremely comprehensive source of up-to-date information. As a consequence, today's travellers are far better informed and knowledgeable about potential holiday destinations. The Internet is used to gather information for general orientation purposes, but also to make bookings. Travellers are not only well-informed, but have also started to act as their own booking agents. They are able to book flights, transportation and excursions without the help of travel agencies.

Dutch travellers also seem to have become more experienced in travelling abroad/overseas and as a result have become more self-confident in travelling. They have become more daring in both their choice of destination and travel behaviour. They are not as fearful of travel across long distances to unknown destinations as they were in the past.

The growth of the Internet as an information source, combined with more experience, has made today's travellers a bit spoiled. This may explain the increase in demand for more luxurious, exclusive and special holidays. Parents sometimes even use special holidays to make family vacations a more appealing prospect for their children.

2.1.2 A shift in type of holiday: a higher demand for 'experience', adventure and exclusiveness

As mentioned above, there is a higher demand for holidays that differ from mainstream trips. Travellers today want more than just a vacation; they want an 'experience'. They want more than a mainstream visit to a city. Some want a 'taste of how people really live at their destination' and get that by working on a ranch, for instance, or sleeping in a tipi. Others want a theme-based holiday, such as a wellness holiday (visit to a spa or beauty centre) or a "Thelma & Louise" road trip across the United States. Travellers today are also more likely to opt for adventurous holidays, such as kayaking with Orcas or bear-watching trips. More travellers today want to be surprised, to see and do things they (and others) have never seen and done before. They want their vacation to be an experience and they want interesting stories to tell when they return home.

2.1.3 Greater need for freedom, individuality & tailored trips

Although the quantitative research shows that a large percentage of Dutch travellers prefer to book their accommodation in advance, the experts observe that many travellers today are unwilling to tie themselves down by reserving all of their accommodations and excursions in advance. According to them, more people are booking their flights and leaving their other options open than in the past, so that they have the freedom to decide when and where they want to go and what they want to do when they are at their destination.

The apparent discrepancy between the quantitative and qualitative results can be explained by the fact that the quantitative output applies to holidays outside Europe in general. The qualitative output will be different when generated for a certain country in particular, (e.g. Canada). This point is further clarified in section 4.2.

Travellers today, according to the experts, are also more interested in individual travel and tailored trips than in group tours, partly because they want more freedom when they are travelling and they want special trips, but also because they have become more independent and experienced travellers. They feel less of an urge to travel 'safely' in groups with everything organized and arranged for them. Individual travel also enhances the traveller's feeling of adventure.

A tailored trip contributes to the feeling of exclusiveness because, unlike a group tour, a tailored trip is arranged according to the traveller's specific desires and therefore increases the feeling of exclusiveness.

2.1.4 Role of media exposure in increasing demand for a specific destination

Another trend observed by the experts is the role of media exposure. Media exposure, both positive and negative, increases demand for a specific destination. Demand for trips to the United States, for instance, is currently high because of the constant references to the United States, the primaries and the upcoming elections in the news. Similarly, demand for destinations in Asia increased after the tsunami. However, this increase did not occur immediately after the tsunami, but occurred once 'things had settled down'. Although news items on the areas hit by the tsunami were not positive, they did arouse curiosity and interest.

2.2 Trends and potential consequences travel trade

The observed trends have potential consequences for the approach, travel products and role of travel trade organizations:

- Travel trade organizations need new targeting methods and communication channels in order to reach their target groups, since the target groups' needs are less clear-cut and easy to divide into segments today than they were in the past.
- Travel trade organizations need to adapt to ever increasing usage of the Internet. The role of the travel trade organization is twofold; on the one hand it retains its role as advisor. On the other hand, it is also playing the role of facilitator as consumers become more knowledgeable. In the latter role, the travel agent is literally 'used' for information. Quantitative research shows that many Dutch consumers still visit a travel agency for advice, but that they more often actually book their holiday via the Internet. The visits to travel agencies are described in greater detail in section 3.2.2. The Internet is the preferred booking outlet for 63% of the Young Adults, 59% of the Young Families and 52% of the Mature Families. However, travel agencies are still used to book longer, more complex trips. Travel agencies offer the consumer convenience when booking complex trips: booking complex trips without the help of a travel agency via the Internet is often perceived as a hazardous and time consuming task.
- Travel trade organizations also need to adapt to changing demand by diversifying their products and offering a larger range of tailored products.
- Travel organizations are changing their products to adapt to the higher need for special, exclusive, 'experience' trips and are also adapting their offering to exploit media exposure received by certain destinations. For example, advertising trips to Toronto in combination with tickets to the world premiere of the first major stage adaptation of the Lord of the Rings trilogy.

3. BOOKING, INFORMATION GATHERING & SOURCES USED

3.1 Booking outside Europe

One question that arose during the research was the question of whether holidays outside Europe are set to become more of a commodity in the future due to increasing use of the Internet, with a shorter, more impulsive decision-making process. In actual fact, the quantitative research reveals that this is not the case. Most Dutch travellers book their holiday outside Europe between two to six months in advance. The percentage of Dutch travellers who can be classified as 'impulsive' is actually very low (see figure 1). This can be explained by the fact the Dutch travellers spend an average of three weeks on their holiday outside Europe. The average Dutch traveller needs time to save money and needs to get time off from work for a holiday this long.

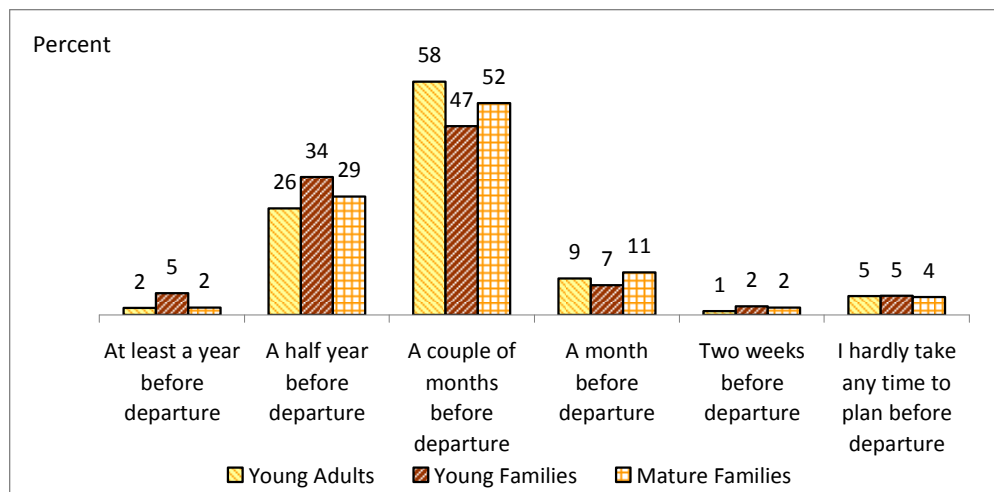


Figure 1. When do you book your holiday outside of Europe?

3.2 Information gathering & sources of information for Alberta

As shown in figure 1, Most Dutch travellers book their holiday outside Europe between two and six months in advance. The same applies to holidays to Alberta. Given the amount of time between booking the trip and actually leaving home to begin the holiday, we expected Dutch travellers to consult many sources for information on their holiday destination. As figure 2 reveals, our expectations were confirmed. Dutch travellers consult the internet, travel agencies, maps and family & friends most often.

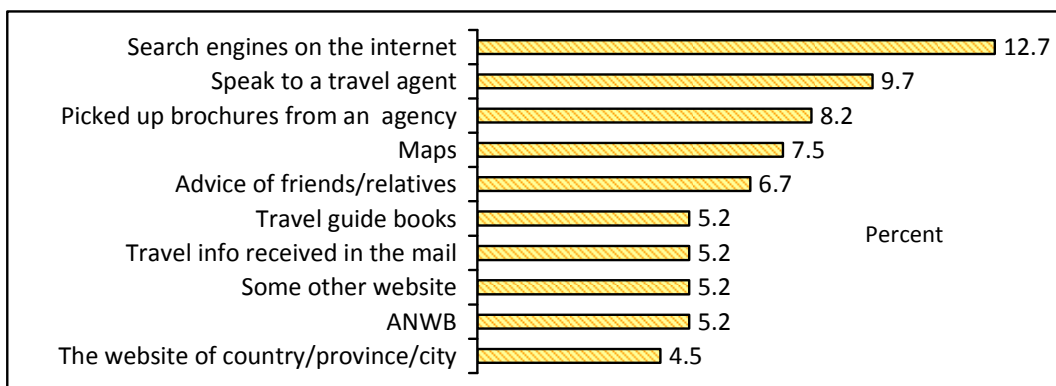


Figure 2. What kind of sources did you use when gathering information on Alberta? (TOP 10)

Other information sources include travel programmes on television, travel fairs and embassies. The different sources are used at different stages of the information gathering process. Information on the different sources of information is given below.

Word of mouth plays the role of key influencer at different stages in the information gathering and decision-making process for holiday destinations. Word of mouth often arouses initial interest in a particular holiday destination. Word of mouth recommendations are especially powerful when based on actual, first-hand experience of the destination since these experiences convey the atmosphere and brings the destination to life in the mind of the traveller.

Word of mouth is also integrated into almost every other source of information on holiday destinations. To clarify: word of mouth influence is found in the personal experience of travel TV programme hosts, in personal reviews on the Internet and in personal experiences written up in magazines and books, often with photographs, but also in the first-hand experiences of friends, family and travel agency employees.

Alberta also benefits from the positive effect of first-hand experience. The positive attitude towards Alberta that travellers who have opted for Alberta already have based on word of mouth, is reinforced during their holiday in Alberta and turns them into 'Alberta ambassadors' themselves. It is not only consumers who enjoy spreading the word, however, but also travel trade employees. Travel trade employees are no different from the rest of us in their desire to talk about their own travel experiences and their enthusiasm works contagiously.

The figure below shows the different sources of information and the key influence of word of mouth.

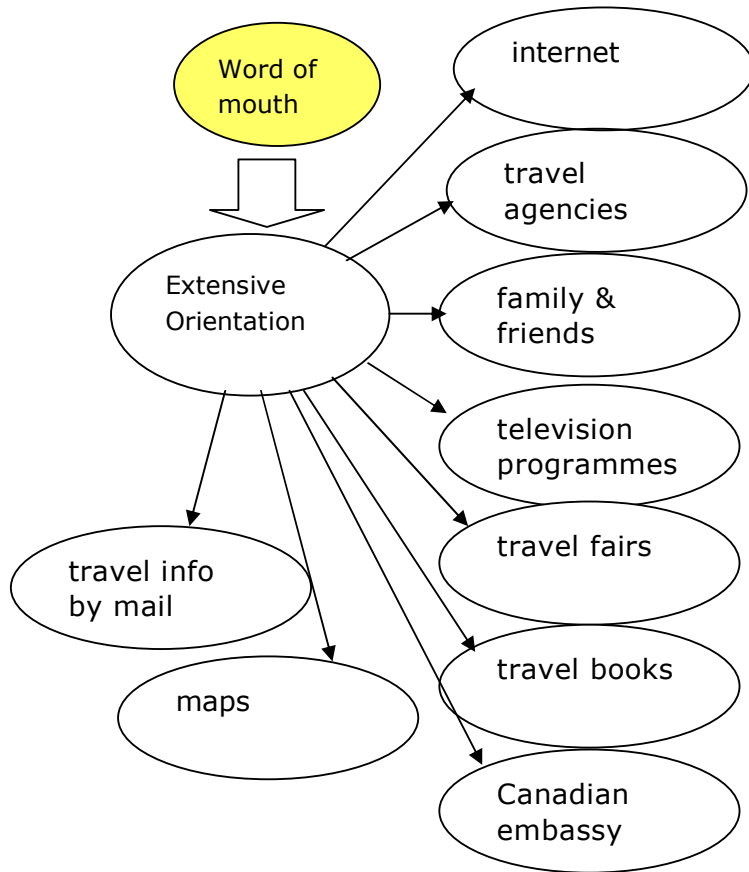


Figure 3: Importance of word of mouth & other information sources

3.2.1 Internet

The internet is perceived as one of the most important sources of information and is used during the entire information gathering process and also for actual bookings. Not surprisingly, the internet is used less often during the trip. The perceived advantages of this source are:

- the extended offer of information on a wide variety of subjects
- it is available at any time (e.g. not limited to opening times)
- it offers up to date information
- it offers a clear comparison of prices (for flights, accommodations, campers/cars, etc.)
- it offers reviews
- it offers photos that give a taste of the atmosphere

3.2.2 Travel agencies

Like the internet, travel agencies are also perceived as one of the most important sources of information. Travel agencies offer travel brochures, guidebooks and personal advice on the destination. However, Dutch travellers also sometimes literally 'use' travel agencies for information gathering and price comparison purposes. The traveller gathers the information he or she needs at the travel agency, but then books the trip via the internet based on the brochures and responses to questions given by the travel agency.

As mentioned earlier in this report, most bookings today are done via the internet. However, the decision to book via the Internet or via a specialized or non-specialized travel agency also depends on the type of trip being booked. To organize and book more complicated trips, which are perceived as time-consuming and hazardous to book independently, the traveller prefers to turn to a travel agent.

Specialized and non-specialized agencies

The quantitative results show that over 80% of all three target groups, who book their holiday outside Europe via a travel agency, do this at a travel agency with a broad offer of products (non-specialized). The results also show that most of the respondents do not know where they want to go when they visit the travel agency. Non-specialized agencies offer a broader range of destinations and, at this stage in the decision-making process, there is no need for a specialized agency. Travel agencies play an important role in triggering interest in a given destination at this stage.

Once travellers have a better idea of the country or destination they want to visit, they are more likely to go to a specialized travel agency. During the qualitative sessions, some respondents explicitly expressed a preference for a specialized agency in gathering information on and booking a trip to Canada. In their perception, the specialized agencies are better advisors than the non-specialized agencies. They expect the specialized agencies to be more knowledgeable about Canada. The role of the specialized travel agency is not to trigger interest in a given destination, but to further inform the traveller on what there is to see and do at the already chosen destination.

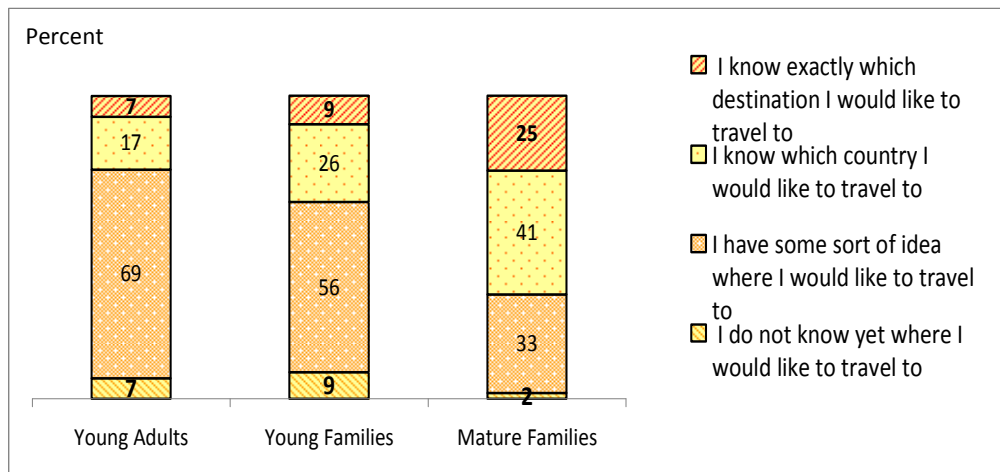


Figure 4. Which of the following statements applies to you most? When I visit a travel agent...

Figure 5 below shows the information gathering process at specialized and non-specialized travel agencies, including information on when these agencies are used merely as source of information (with bookings made via the internet) and when these agencies are used to actually book the trip. The figure also shows the respective focus points of the two agency types, i.e. non-specialized agencies trigger the traveller’s interest in a given destination and specialized agencies give the traveller further information and book the trip.

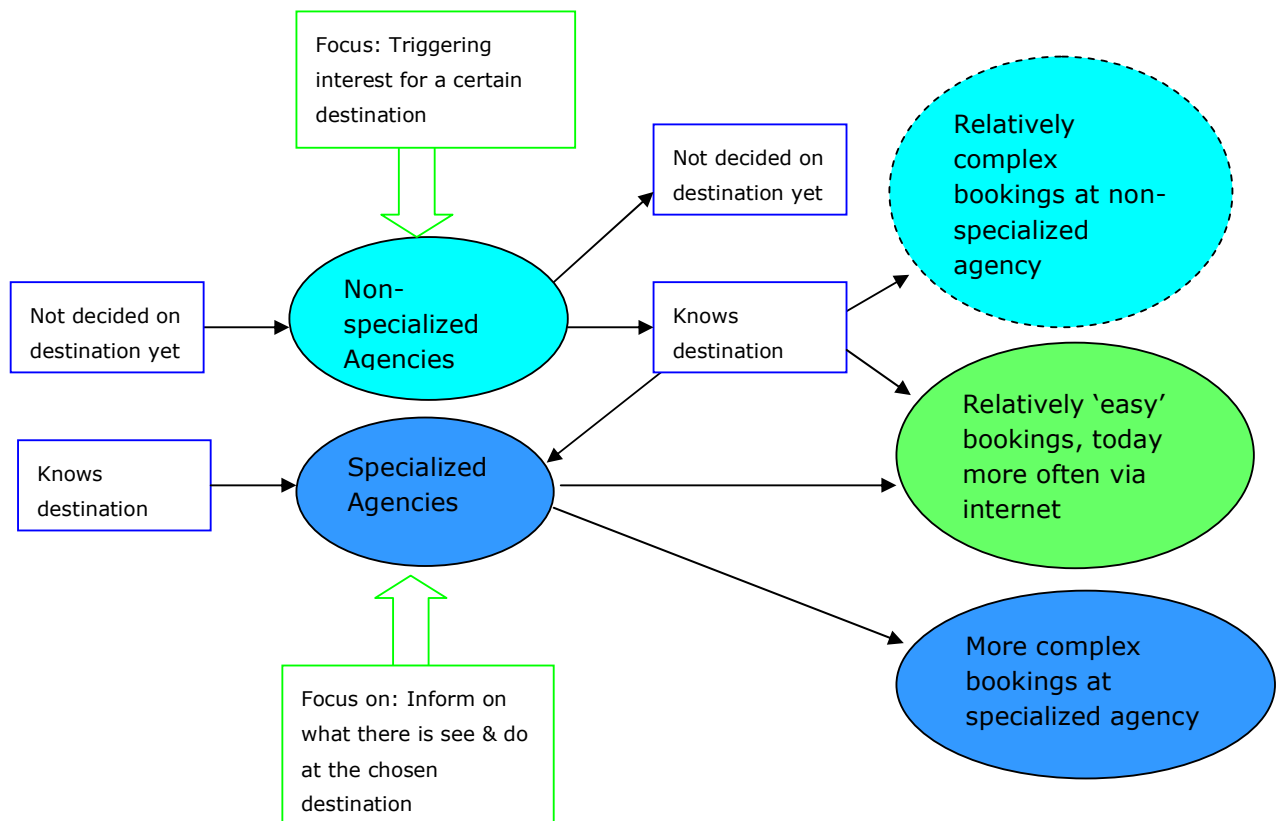


Figure 5. Specialized & non-specialized agencies

3.2.3 Friends & Family

Friends and family play a very important role. Often, it is they who trigger initial interest in Canada by sharing their 'contagious' positive experiences. Family and friends are consulted before and after the trip is booked. They are consulted for 'tips' and 'tricks' and help the traveller to decide how long to stay, what to see and do, where to stay, how to travel, etc. Friends and family are perceived as a trustworthy source of information since they have no commercial interest in promoting a given destination.

3.2.4 Travel books

Dutch travellers use travel books such as Lonely Planet both before and during their trip. Use of this source generally occurs after they have decided on a given destination. They are used for general information and for specific information on activities and accommodation.

3.2.5 Television programmes

Television programmes, particularly travel television programmes, play an important role in arousing initial interest. The programmes are referred to as an important source of inspiration. The lively way in which the (often non-standard) destinations and their atmosphere are presented and the additional personal experiences of the hosts arouse curiosity and interest in the various destinations. Almost 20% of the respondents watch travel programmes on television. The most popular program is by far 'RTL travel Adrenaline'.

3.2.6 Travel Fairs

Travel fairs, most often the 'Vakantiebeurs in Utrecht', are visited to gather initial information on possible destinations. Fairs are particularly important to those who have not yet decided on a destination and are used as a source of travel brochures and travel inspiration. The 'Vakantiebeurs in Utrecht' is the most popular travel fair.

3.2.7 Canadian Embassy

The Canadian embassy is consulted for factual information on subjects such as visas, vaccinations and national holidays. This source is most often used once the destination has already been chosen.

Information in Dutch

The quantitative research results reveal that information in Dutch is preferred over information in other languages. Over 50% of Young Families and Mature Families feel that it is important or very important to have information about holiday destinations in Dutch. Nearly 40% of Young Adults feel that it is important or very important to have information about holiday destinations in Dutch

4. AWARENESS, DECISION MAKING PROCESS & PLANNING BEHAVIOUR ALBERTA

4.1 Awareness of Alberta

To describe the decision-making process for Alberta, we need to understand Alberta’s awareness levels. The awareness of Alberta among the Dutch consumers is low. The quantitative results show that 45% of the respondents have never even heard of Alberta. 25% of the Mature Families thought that Alberta was a city.

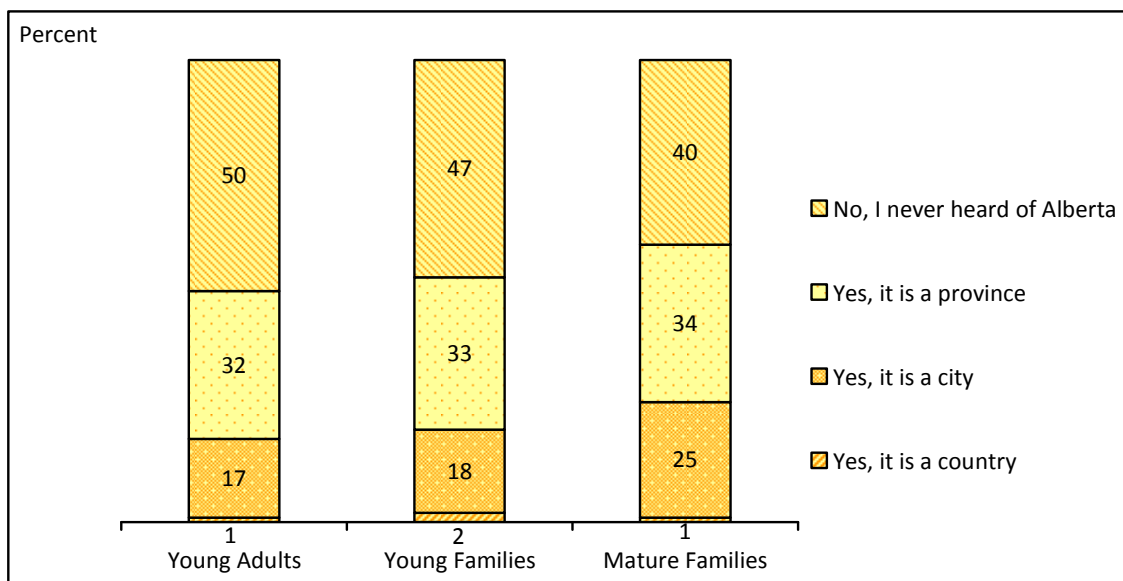


Figure 6. Have you ever heard of Alberta?

Most Dutch travellers do not consciously choose Alberta as a destination because awareness of Canada and its provinces is low in the Netherlands. Dutch travellers more or less ‘discover’ Alberta at the end of the decision-making process. Initial interest is often aroused for Canada in general. After gathering information on Canada and the possibilities it offers, the traveller discovers Alberta as a part of Western Canada and ‘home of the Rockies’.

The Dutch traveller's decision-making process is depicted below:

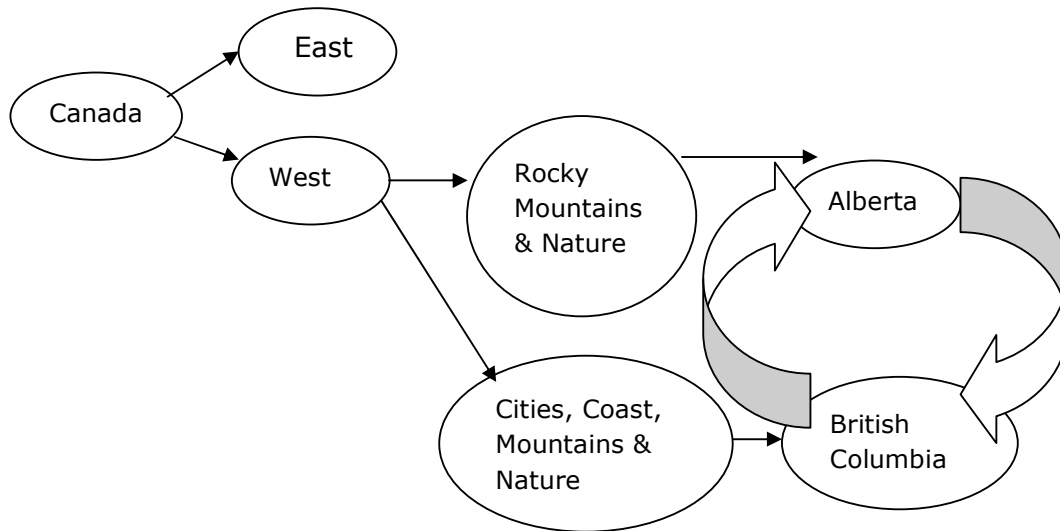


Figure 7. Decision-making process for Alberta

Dutch travellers generally opt for Canada at the start of the process and then decide whether to visit Eastern or Western Canada. If the traveller wants to see nature in all its beauty and ruggedness, Western Canada is chosen. The desire to visit the Rocky Mountains then leads the traveller to Alberta. Travellers who want to combine nature, the Canadian coast and a vibrant city (Vancouver) choose British Columbia.

According to the travel trade organizations, most Dutch travellers decide to combine the two provinces during their visit to Western Canada. They visit both Alberta and British Columbia, which means that attracting tourists to one province is in fact attracting tourists to both provinces. However, it is more likely that visitors to Alberta will also visit British Columbia than vice versa.

4.2 Planning behaviour

As mentioned earlier in this report, Dutch consumers prepare in advance for holidays outside Europe. This also applies to Canada. Advance preparation is required because the Dutch lack knowledge of this immense country and its possibilities. They put a great deal of effort into gathering information and consult numerous sources of information. However, Dutch travellers do not necessarily gather in-depth information on activities and specific sights, but tend to look into more global topics, such as:

- What part of Canada they want to visit

- Means of transportation (car, camper, bus, train, cruise along the western coast of B.C).
- Distances between places
- How much time to spend and where to spend it

There is a difference in the extent to which the Dutch travellers plan their trip in advance. The results of the quantitative study show that the Dutch generally prefer to book their airline tickets and accommodation in advance. However, as the qualitative research results reveal, there are certain nuances that must be taken into consideration. Travel trade experts observe that travellers today are unwilling to tie themselves down during their holiday outside Europe by reserving all accommodation and excursions in advance (see 2.1.3). Consumers who participated in the qualitative research also said they liked to keep part of their itinerary open.

The apparent discrepancy between the quantitative and qualitative results is caused by the fact that questions related to planning were posed for holidays outside of Europe in general during the quantitative study. The outcome will be different if the same questions are posed for a specific country. Planning behaviour for Senegal, for instance, is likely to be different for a country such as Canada. Dutch travellers are more likely to feel confident travelling with an open itinerary in Canada than in Senegal because Canada is perceived as an accessible and safe country. The Dutch know the language, which makes them feel safe and in control of their holiday in Canada. The high quality travel conditions that Canada offers add to Canada's accessibility to Dutch travellers.

In the qualitative sessions, we learned that visitors to Canada often describe themselves as adventurous. 'Adventurous' in this context is travelling without planning and booking everything in advance. Other aspects of the feeling of adventure are:

- Visiting a place that, because it is less well-known and familiar, feels more daring and out of the ordinary
- Travelling through 'rugged' nature
- Encountering wildlife

Dutch travellers who have visited Canada often describe themselves as adventurous. Although they are 'adventurous' in that they leave part of their itinerary open, in terms of specific activities and accommodation, they do plan most of their itinerary in advance. In this respect, they can be characterised as 'safe travellers'. When travelling independently by car or camper, they are free to move around more impulsively or to stay an extra day at a given location, for instance. During the high season in Canada, however, they have less freedom to be impulsive and adventurous because hotels and campsites are fully booked.

Planning behaviour correlates more closely to personality than to life stage. A traveller with a higher need for adventure is more likely not to plan everything in advance than a traveller who feels a bit insecure and has a higher need for control and security. The latter traveller displays a stronger tendency to book transportation, number of days per city, accommodation and excursions in advance.

5. PERCEPTION CANADA & ALBERTA, TRAVEL MOTIVATION & TRAVEL BEHAVIOUR

As mentioned in section 4.1, the Dutch opt for Canada as a destination first and then discover Alberta while gathering information on Canada. Initial awareness of Alberta is low. One of the visitors in the qualitative sessions visited Banff and Jasper, but was unaware of the fact that he had been to Alberta until the discussion was well underway.

The lack of awareness of Alberta automatically results in a relatively blank image of Alberta amongst Dutch travellers. They do not have a clear perception of the province. Their perception is often based (and therefore limited) on the general perception they have of Canada as a whole (Alberta=Canada). In this lies a crucial point for Alberta. As mentioned above, a visit to Alberta is usually the result of a decision to visit (Western) Canada. However, according to the both travel trade experts and consumers, Canada is not a top-of-mind destination, in part because it suffers from a lack of exposure in the Netherlands.

Since Alberta is inherently associated with the characteristics of Canada in general, we start below with a description of the country as a whole and then focus on Alberta later in this section.

5.1 Perception of Canada

Canada is associated with green, the maple leaf, unspoiled and rugged nature, lakes, mountains, freedom, friendly, sincere & well-mannered people, the great outdoors, wildlife, fresh air, cleanliness, space, peace & quiet (rest), well organized (good shopping, accommodations, infrastructure), good food and safety (politically stable), but Canada is also seen as somewhat dull and stuffy, possibly because so many older people go to Canada on vacation. Canada's image lacks vibrancy and playfulness.

According to the experts, Canada is an attractive travel destination for Dutch people. One of the reasons is Canada's high accessibility. There are several aspects which add to this perceived accessibility: the similarity between the Canadian and Dutch culture, use of English as the main language, which most Dutch people are able to speak fluently, the friendly and sincere Canadian people and, last but not least, Canada's infrastructure and accommodation, which makes touring through the country easy.

The Dutch also have a strong bond with Canada because many Dutch citizens immigrated to Canada in the Fifties. Many Dutch people have relatives or acquaintances living in Canada.

Canada also offers a pleasant climate (in the summer), plenty of unspoiled nature and space for relaxation and adventurous outdoor activities. It is also closer to the Netherlands than other destinations with similar amenities, such as New Zealand.

5.2 Perception of Alberta

5.2.1 Knowledge of Alberta

Consumers

As mentioned above, Dutch travellers go through an intensive information gathering process before embarking on a trip to (Western) Canada. However, even Dutch travellers who have actually been to Canada lack specific and detailed knowledge of Alberta. The respondents had trouble recalling the places and sites they visited in Alberta during the qualitative sessions. Their visit to Alberta did teach them that there is more to do in Alberta than they were aware of in advance (e.g. kayaking, rafting and caving). Unfortunately, it was impossible for them to fit the activities that they discovered while in Alberta into their itineraries. They had no time for activities other than the ones they had already planned.

Had their itinerary been less fixed and had they had more knowledge of what Alberta has to offer in advance, they would most likely have stayed longer in Alberta (largely by decreasing the amount of time spent in British Columbia).

Travel trade experts

The representatives of the travel trade who were interviewed during this research all held the position of product manager or president in their respective organizations. All of the travel trade experts can be characterised as Canada specialists. Canada plays an important role in their work. Consequently, their knowledge of the country in general and Alberta in particular, is high, particularly amongst those who put together Canada travel brochures. They have invested time and effort in finding out what there is to see and do in Alberta.

Although knowledge of the experts is high, we expect knowledge in other levels of the organizations to be lower. Employees who sell the trips at the physical travel outlets or by telephone are not necessarily as well informed as those who put together the travel brochures and

trips. Moreover, many have not been to Canada and therefore lack first-hand experience. Therefore, their perception of the country might be less vivid (and positive) and their knowledge less in-depth than that of a product manager or president.

5.2.2 Perception of Alberta

Expectations regarding Alberta prior to the trip are similar to the expectations of Canada in general (i.e. rugged nature, beautiful scenery, wildlife, green, national parks, mountains, lakes, peace and quiet, fresh air and clean).

However, the expectations of all of the respondents we spoke with in the qualitative sessions (both the travel trade experts and the consumers), were exceeded when they actually visited Alberta. They experienced Alberta as more immense, magnificent, rugged, mystic, peaceful, quiet, pure, healthy, clean, relaxed, natural and friendly than they could ever have imagined beforehand. As mentioned earlier in this report, visitors to Alberta become ambassadors for the particular parts of Alberta that they visited. They return home and start 'spreading the word' and triggering interest in Western Canada in others by sharing their enthusiastic stories. The main perceived strengths of Alberta are the Rocky Mountains and Alberta's beautiful national parks and wildlife.

Overall, the visitors all experienced their visit to Alberta as very positive. Aspects that were perceived as less positive are:

- the extreme drops in temperature
- long drives to get from place to place
- Alberta is sometimes also perceived as a bit boring; it is quiet and has limited diversity in terms of landscapes (note: most respondents only experienced the Rocky Mountains) and lacks vibrant cities and entertainment
- Although closer than New Zealand, Canada is still quite far from the Netherlands

Although the area that most of the respondents visited in Alberta (i.e. the Rocky Mountains) is perceived as overwhelming and extremely impressive, some respondents still characterize it as 'a lot of green, lakes and mountains'. It is in this sense that Alberta 'lacks diversity' in the eyes of some of the respondents. These travellers lack a frame of reference for other parts of Alberta and are unaware of the variety that the rest of the province offers.

According to the travel trade experts, Alberta has the following strengths and weaknesses:

Strengths

- Diversity in nature and activities (rafting, kayaking, hiking, etc.)

- Lower taxes than British Columbia, making renting a motor home in Alberta a more attractive proposition
- Good infrastructure

Weaknesses:

- Alberta is not a top-of-mind destination
- Low consumer awareness of the province of Alberta
- Perception of cities in Alberta as lacking in charm, vibrancy and atmosphere. Calgary is perceived as rather dull and Edmonton as rather 'out of the way'.
- Alberta is not perceived as an attractive destination on its own, but as part of a combined trip with British Columbia. Alberta as a destination on its own is hard to sell, but combining Alberta with British Columbia adds value
- The perception that Alberta has little to offer tourists aside from the Rocky Mountains
- Relatively short travel season: Alberta has long, extreme winters
- Alberta is busy during the summer
- Public transport is not optimal
- Trips to Canada in general and Alberta in particular have become more expensive due to:
 - improving Canadian economy (particularly in Alberta)
 - higher taxes
 - higher Canadian dollar (higher than US dollar)
- Decrease in number of direct flights to Calgary and Edmonton (due to Martinair's decision to discontinue their direct flights). A layover now makes the travel time to Alberta longer, less comfortable and less attractive.

5.3 Travel motivation

Overall, motivations for choosing Alberta and Western Canada as a holiday destination are similar:

- Need for nature and wildlife
- Need for rest/peace & quiet and relaxation
- Need for adventure (visiting new unknown territory)
- Visits to friends and family
- Presence of friendly and helpful people
- Need to visit a country in which travel is safe
- Motivations that are specific to Alberta are:
 - Rocky Mountains

During the qualitative sessions, we learned that visiting friends and family is a motivator to travel to Canada, but that this motivator is usually secondary to the need for nature and wildlife and the need for relaxation and rest. Of the respondents who have visited Alberta (extremely small percentage of the total sample), only 4% actually visited friends and family while in Alberta. As figure 8 reveals, nature is the most important motivator in arousing interest in (Western) Canada.

The Rocky Mountains is shown a strong motivator. 50% of the respondents who have actually been to Alberta stated that the Rocky Mountains were one of the reasons they had visited Canada.

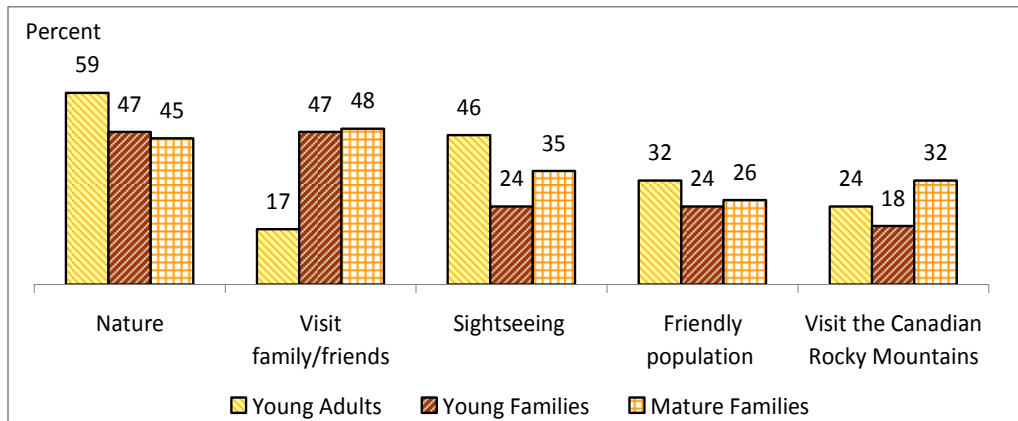


Figure 8. What were your motivations to go to Canada (TOP 5 mentioned)

When asked why they had never been on a holiday to Canada, most respondents in all three life stage groups said that a holiday in Canada had ‘just never happened’. Most respondents who filled in an answer for ‘other, namely’, stated that they were interested in Canada, but that it was not at the top of their list of destinations. This could be explained by the fact that Canada is not a top-of-mind destination or by the fact that other countries are higher in their list of priorities. None of the respondents who filled in an answer for ‘other, namely’ actually rejected Canada as a holiday destination. When respondents who had been to Canada were asked why they had not been to Alberta, 37% stated that a visit to Alberta had ‘just never happened’ and 30% had ‘never thought of it’.

5.4 Travel behaviour

Travel companion

The Dutch travel with various travel companions to Alberta. Some travel with a friend or group of friends, some travel with their partner, some with their children and some, often due to the distance, without their children. The travellers who leave their children at home do so because travelling to a destination as far away as Canada contributes little for very young children (0-4 years old). They are too young to realize or care where they are and are happy anywhere that they are able to play. Of course, factors such as safety, clean accommodation and restaurants play a role for Young Families travelling with children, but the decision to visit (Western) Canada is mainly driven by the desire of the parents, not the children.

Locations visited

Most of the respondents combined a trip to Alberta with a visit to British Columbia. The quantitative study shows 81% of the people who visited Alberta also visited British Columbia. Some visitors combined a trip to Alberta with a trip to the United States.

The visit to Alberta itself is often limited to the Rocky Mountains and Alberta’s national parks, which again confirms the importance of nature as a driver for visits to Alberta. Tours of Alberta often include a visit to Jasper, Lake Louise and Banff. The Dutch traveller rarely goes any farther south or east than Calgary or farther north or east than Edmonton. This might be explained by the limited knowledge the Dutch traveller has of what the north, south and east of Alberta have to offer or by the relatively limited number of travel offers that include these other parts of Alberta.

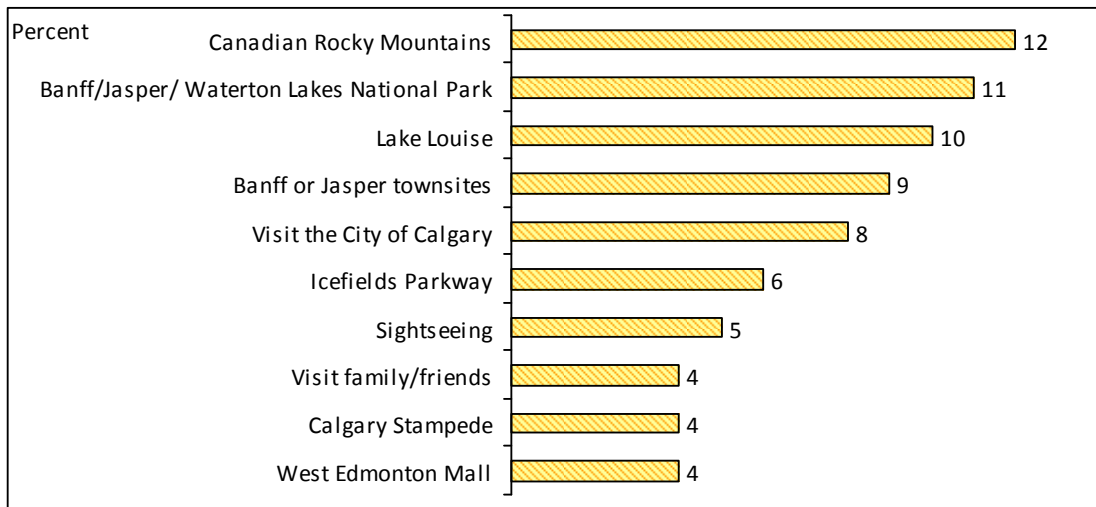


Figure 9. What did you do and where have you been during your holiday in the province of Alberta? (TOP 10)

Activities

Activities that the visitors undertook during their visit to Alberta vary from walking, biking, skiing, driving and shopping to visiting parks, glaciers and the zoo. None of the respondents mentioned activities such as the Calgary Stampede or visits to Drumheller, Dinosaur Provincial Park or aboriginal sites. However, that is not particularly surprising given the fact that their visit to Alberta was limited to the Rocky Mountains and environs and that most of the respondents were unaware of these other attractions. As mentioned in section 5.2.1, visitors sometimes discover that there is more to see and do in

Alberta than they knew about in advance, but are unable to deviate from their planned itinerary due to time constraints.

Length of stay

On average, Dutch travellers spend 2 to 3 weeks in (Western) Canada. Mature Families tend to stay a bit longer, with most staying 3 weeks or longer. Dutch travellers want to see as much as possible during their stay.

According to both the qualitative and quantitative results, Dutch travellers spent between 5 days and 2 weeks in Alberta. The average length of stay in Alberta was 10 days of the total available vacation time. Most of them spent the rest of their total available vacation time in British Columbia or the United States. In hindsight, many visitors to Alberta state that they would have liked to have spent more time in Alberta because Alberta offered more to see and do than they had realized in advance.

Transportation

The Dutch travel by car, camper or bus. The bus is perceived as most convenient when travelling with younger children aged 4 to 8. Children in this age group tend to get bored with long confinements in a car or camper. When travelling by bus, they have more space and the opportunity to 'move around' and make friends with other children in the bus.

Travelling by camper is perceived as more exciting and flexible than travelling by bus. With a camper, travellers can stop when and where they want to and make more impulsive decisions as they travel, e.g. to stay an extra day at a given location if possible. This gives a feeling of adventure. Moreover, travellers with a camper never have to look for accommodations, which add to the feeling of freedom. Travelling with young children in a camper is considered less attractive. The evenings are often cold, which makes it necessary to sit inside the camper and be quiet so as not to wake the children.

5.2 Target group for Alberta

Target group

In terms of demographics, the largest group of visitors to Canada and Alberta today consists of Mature Families. Mature Families have more spare time and are therefore able to take longer holidays overseas than Young Adults and Young Families.

However, Alberta also attracts couples aged 30+ without children and Young Families with children aged 8 – 15 years.

The quantitative research shows that the Dutch travellers who are most likely to visit Alberta are from the highest social classes: Dutch AB1.¹ Canada is a relatively expensive travel destination, which makes it less attractive for travellers with a more limited budget.

Alberta is perceived as a less attractive destination for families with children between the ages of 15 and 19. Alberta is perceived as too quiet for teenagers because it does not offer much in terms of entertainment and excitement (no clubs).

Alberta is also perceived as a less attractive destination for Young Families with babies or children between the ages 0 to 6/7, primarily because the flight to Alberta is long, driving distances in Alberta are long and children in this age group are too young to really appreciate the vacation. Travelling to a far destination with children in this age group is sometimes experienced as a 'bit of a burden' by the parents.

Alberta is also perceived as less suitable for:

- People who are interested in culture and history: Alberta is perceived as lacking in culture and history
- Shoppers: Alberta is perceived as not having many vibrant cities with a large selection of stores
- Sun-worshippers: Alberta's climate is perceived as cold.

¹ Social classes in the Netherlands are based on education and profession. Hence, social classes AB1 means: people with higher education and profession levels.

6. FUTURE PLANS FOR TRAVELLING TO CANADA AND ALBERTA

6.1 Interest in Canada in general according to the experts

The interest of Dutch tourists in Canada in general and Alberta in particular has been stable for the last few years. Interest in British Columbia has been higher than interest in Alberta, mainly due to higher awareness of this province. Unlike interest in Canada, interest in destinations such as the United States and Iceland has risen. According to the experts, word-of-mouth advertising and greater media exposure are responsible for the increased interest in these destinations.

The experts have two divergent expectations regarding the future level of interest in Alberta as a vacation destination:

- Declining interest due to:
 - the stronger position of the US in the tourism industry (low US dollar)
 - decreased contact with relatives in Canada
 - decreased number of direct flights to Alberta
- Increasing interest as a holiday destination if awareness of Canada and Alberta is raised

6.2 Travel intention of consumers to visit Western Canada, Alberta & the Rocky Mountains

6.2.1 Intention to visit Western Canada

Between 58% and 71% of Dutch travellers who have been on vacation outside Europe in the last five years intend to visit Western Canada. Of this group, a small percentage has already decided to actually go or intends to go within the next 3 to 4 years. The majority, however, does not want to go yet, but does intend to go at some point in the future.

Just over 40% of the Young Families and 39% of the Mature Families indicated that they have no plans to go to Western Canada. In the Young Adults life stage group, this percentage is 29%. Two reasons were usually mentioned by the respondents in all three life stage groups: no interest or too expensive. Other reasons are: other plans, the climate and the long distance to Canada

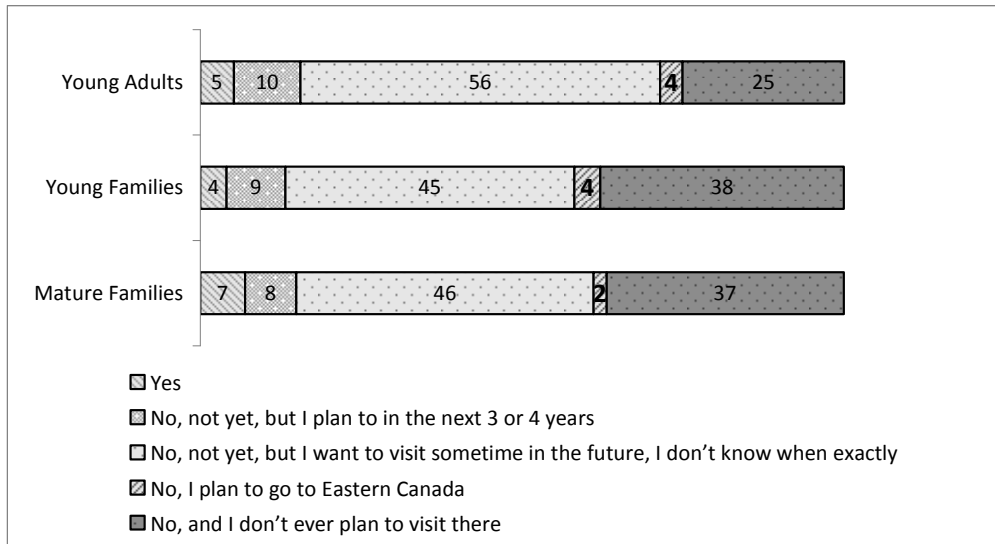


Figure 10 Do you think you will visit Western Canada, including the Canadian Rockies, within the next one or two years?

6.2.2 Intention to visit Alberta & the Rocky Mountains

The respondents who stated that they were planning to visit Western Canada within the next four years were asked how likely it was that they would also visit Alberta; 50% responded 'likely' or 'very likely'. When the same respondents were asked how likely it was they would visit the Rocky Mountains, the percentage increased to nearly 80%. This leads us to conclude that awareness and popularity of the Canadian Rocky Mountains is much higher than Alberta and that the Dutch are not aware of the fact that Alberta is the home of the Rocky Mountains.

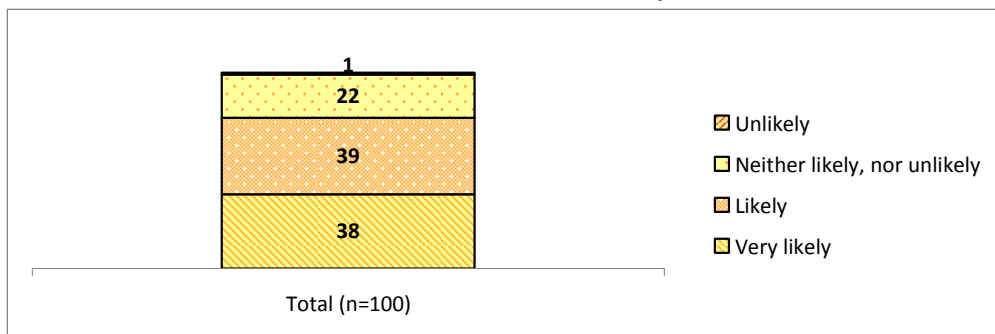


Figure 11. What are the chances you will be visiting the Canadian Rocky Mountains?

6.2.3 Intention to visit Alberta again

Respondents who have already been to Alberta are positive about the idea of visiting Alberta again. Motivations for visiting Alberta again are:

- To show Alberta to others and share the experience with friends, partner or children (when they are old enough) who have not been there yet
- To explore and experience Alberta more extensively and visit the parts of Alberta they have not yet seen
- Security of having a nice holiday: one knows what to expect

Mature Families are less interested in visiting Alberta again than Young Families. Mature Families may be less interested in a repeat visit because they have a shorter future in which to plan such a trip. The main reason given by all three life stage groups for not wanting to visit Alberta again is that they want to see other countries first ('been there, done that').

7. TOURISM POTENTIAL FROM THE NETHERLANDS

7.1 Potential Visitors to Western Canada

According to the Dutch government statistics bureau (CBS, Statline), there were 7,190,543 households in the Netherlands on 1 January 2007. These households can be divided into the three life stage groups used in this study as follows: the Young Adults group accounts for 1,059,464 households, the Young Families group accounts for 1,764,017 households and the Mature Families group accounts for 2,028,729 households. According to the research, 63% of the Young Adults, 46% of the Young Families and 45% of the Mature Families went on vacation outside Europe in the past five years. These figures are the basis for calculation of the potential visitors to Western Canada.

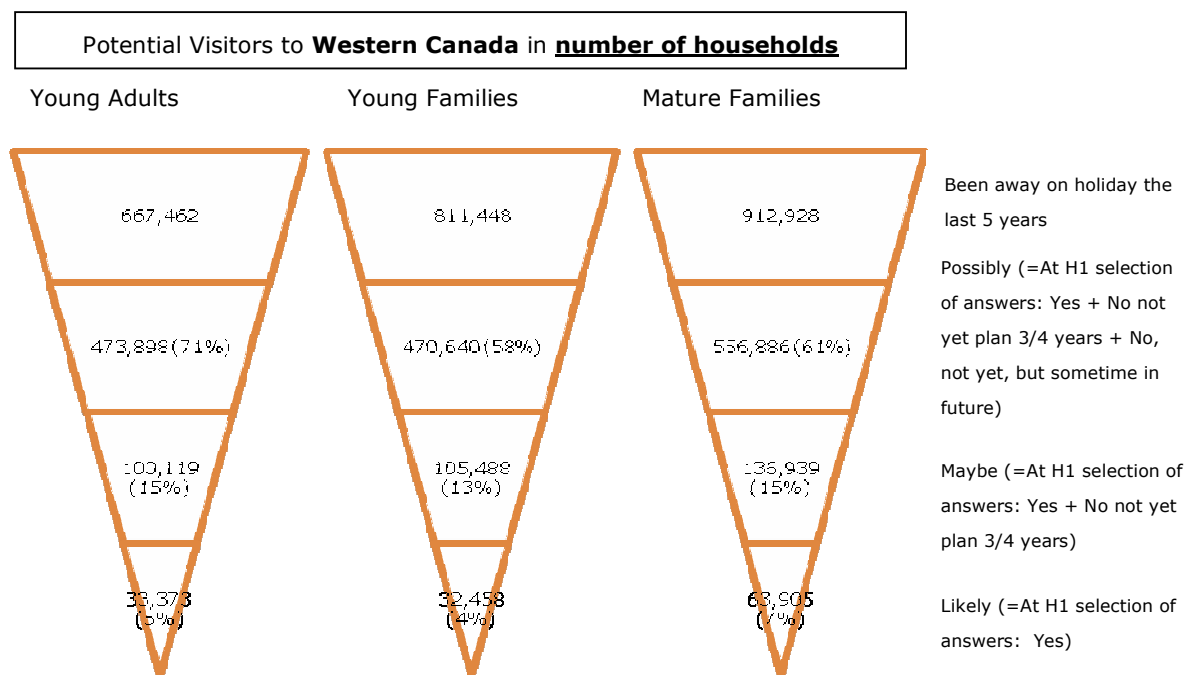


Figure 12. Potential Visitors to Western Canada in number of households

The potential can also be calculated in number of persons. The average number of persons per household in the Young Adults group is: 1.6. On average there are 3.8 persons per household in the Young Families group. In the Mature Families group there are 1.7 persons per household on average. In number of persons, the Young Adults group accounts for 1,695,141 persons, the Young Families group accounts for 6,703,265 persons and the Mature Families group accounts for

3,448,839 persons. Based on this study, 63% of the Young Adults, 46% of the Young Families and 45% of the Mature Families went on holiday outside Europe in the past five years. These figures are the basis for calculation of the potential visitors in persons to Western Canada.

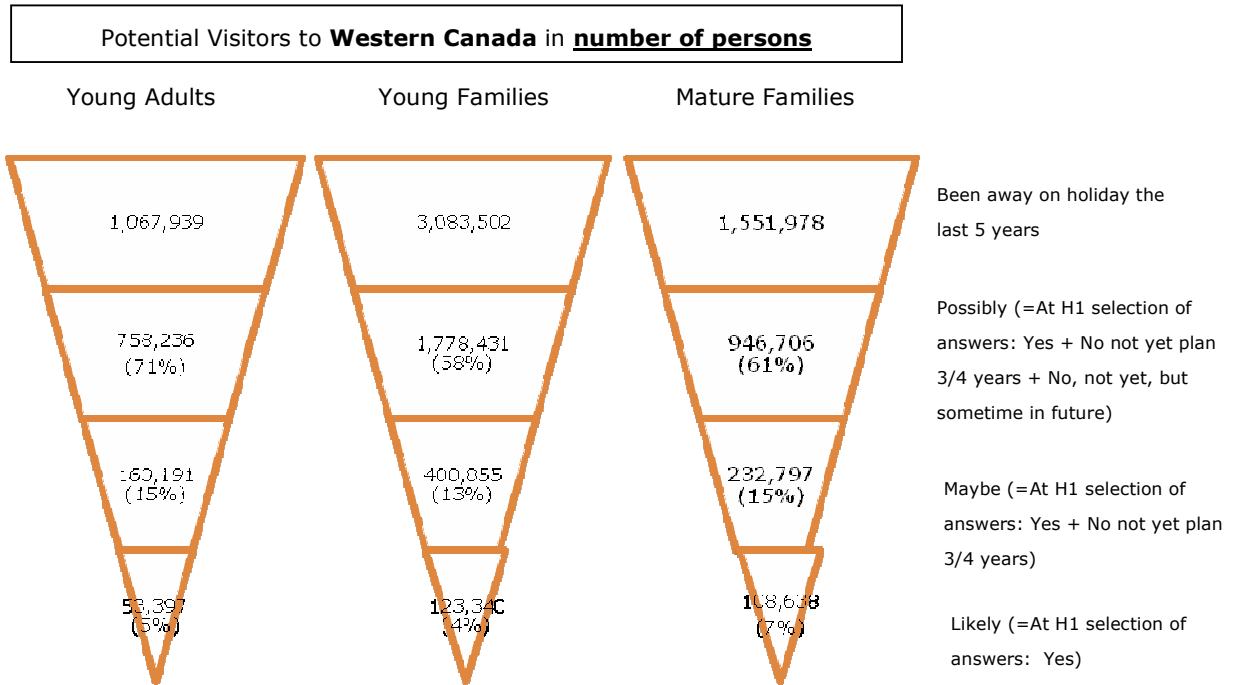


Figure 13. Potential Visitors to Western Canada in number of persons

7.2 Potential Visitors to Alberta

The potential for Alberta is calculated on the following page. The first layer of the pyramid consists of Dutch travellers who have been on a vacation outside Europe in the last five years. The second layer consists of Dutch travellers who intend to visit Western Canada in the next four years and indicated that it is likely or very likely that they will visit Alberta. The last layer consists of Dutch travellers who intend to visit Western Canada and indicated that it is very likely that they will visit Alberta.

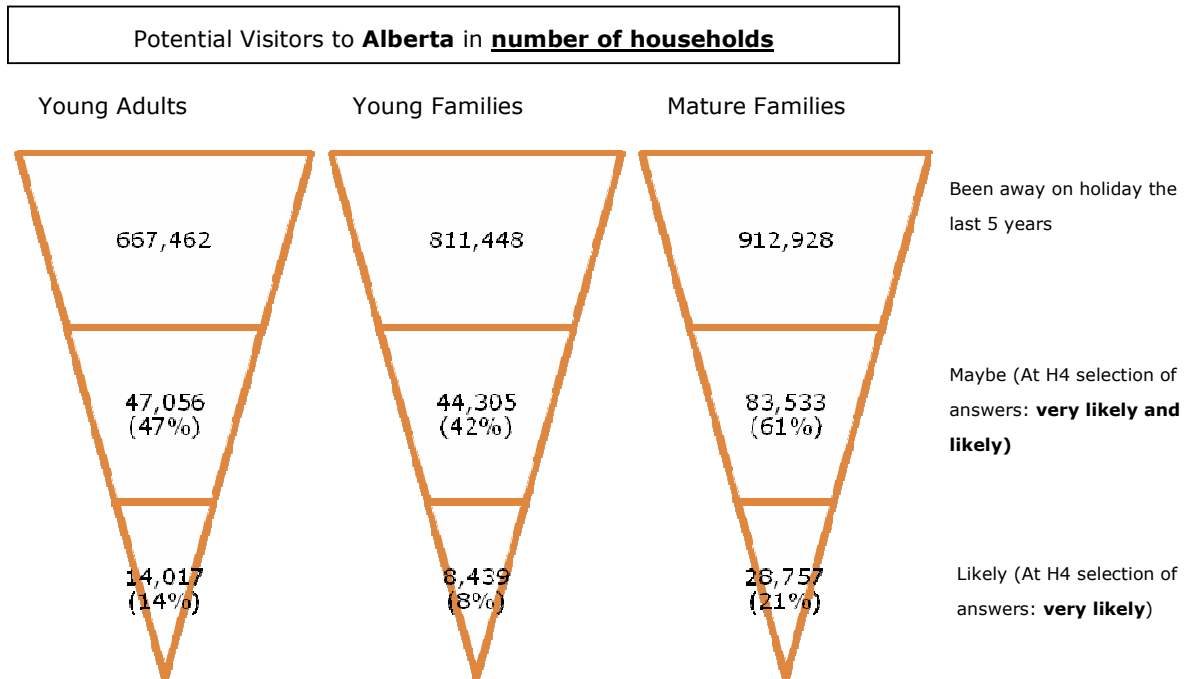


Figure 14. Potential Visitors to Alberta in number of households

The quantitative results show that a larger percentage of the Young Adults and Mature Families have been to Alberta than the Young Families. The potential amongst the Mature Families is the highest. This is also an attractive group because they spend the longest time on holiday, have good financial resources, have more spare time and are not bound to a specific period of holiday.

Young Adults have the second highest calculated potential. As revealed in section 6.2.1, their intention to visit Western Canada in the future is the highest of the three groups. 71% of Young Adults have definitely decided to visit Western Canada, intend to visit Western Canada in the next 3 or 4 years or intend to visit Western Canada in the future, but do not know exactly when.

The calculated potential is lowest for Young Families. The members of this life stage group still have young children and, as mentioned earlier in this report, young children do not appreciate destinations such as Alberta enough to justify the long journey. Alberta is a more attractive destination for Young Families with children between the ages of 8 and 15.

In 2006, 37,000 tourists visited Alberta and spent \$28 million in the province (2006 International Travel Survey, Statistics Canada and

Alberta Tourism, Parks, and Recreation). Based on the results of this study, just over 51,000 Dutch households may be considered potential visitors to Alberta.

A similar calculation is made in number of persons.

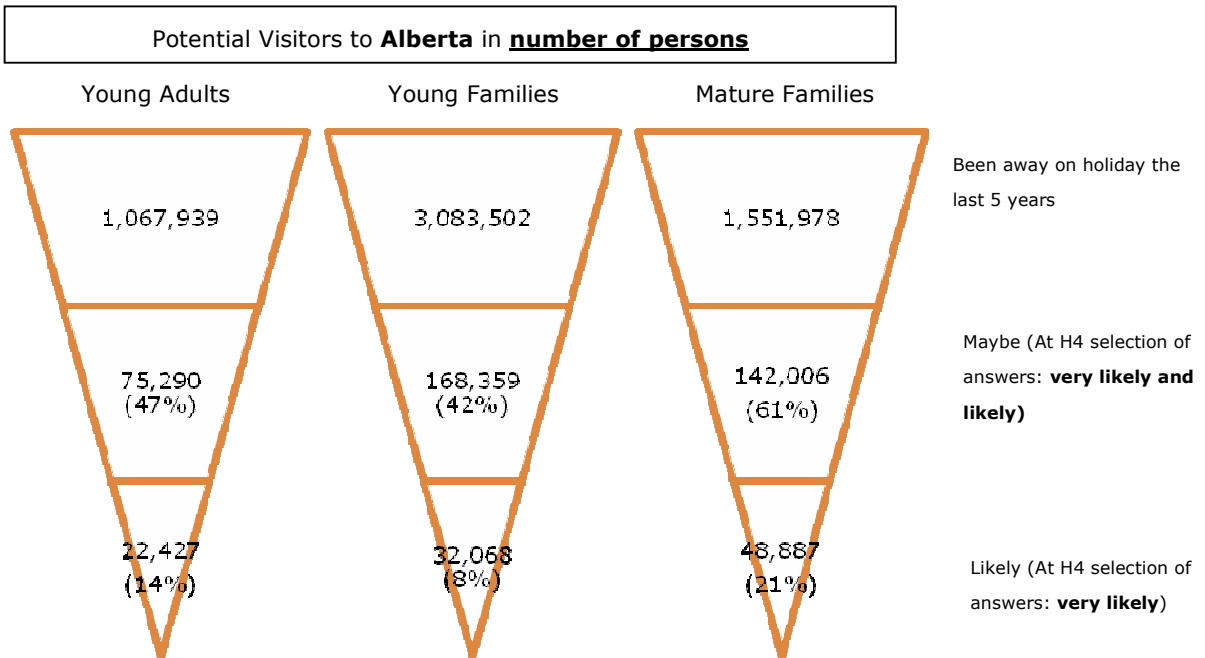


Figure 15. Potential Visitors to Alberta in number of persons

When the number of potential visitors to Alberta for each of the three life-stage groups is combined, the total is 103,382. Assuming spending patterns similar to those of visitors in 2006, these tourists will spend approximately \$78 million in Alberta (based on an average length of stay of 10 nights in the province).

7.3 Potential Visitors to the Canadian Rocky Mountains

Section 6.2.2 shows that there is a large difference between the intention to visit Alberta and the intention to visit the Canadian Rocky Mountains. The potential for the Canadian Rocky Mountains is calculated on the following page. The first layer of the pyramid consists of Dutch travellers who have been on a holiday outside Europe in the last five years. The second layer consists of Dutch travellers who intend to visit Western Canada in the next four years and indicated that it is likely or very likely that they will visit the Rocky Mountains. The last layer consists of Dutch travellers who intend to visit Western Canada in the next four years and indicated that it is very likely that they will visit the Canadian Rocky Mountains.

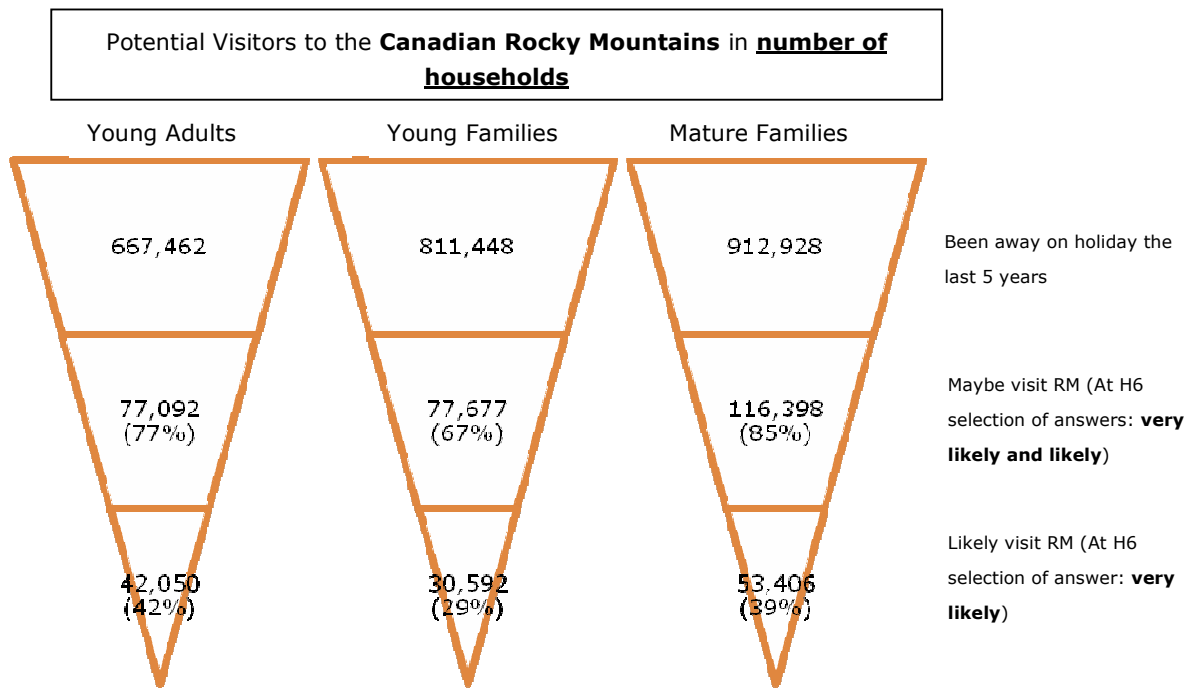


Figure 16. Potential Visitors to the Canadian Rocky Mountains in number of households

As revealed in section 6.2.2, nearly 80% of the respondents, particularly Young Families and Mature Families, are likely or very likely to visit the Canadian Rocky Mountains. As figure 16 shows, the potential for the Rocky Mountains is much higher than for Alberta. Although the calculated potential is low for Alberta amongst Young Families, the potential for the Canadian Rocky Mountains is much higher amongst this group.

A similar calculation is made in number of persons.

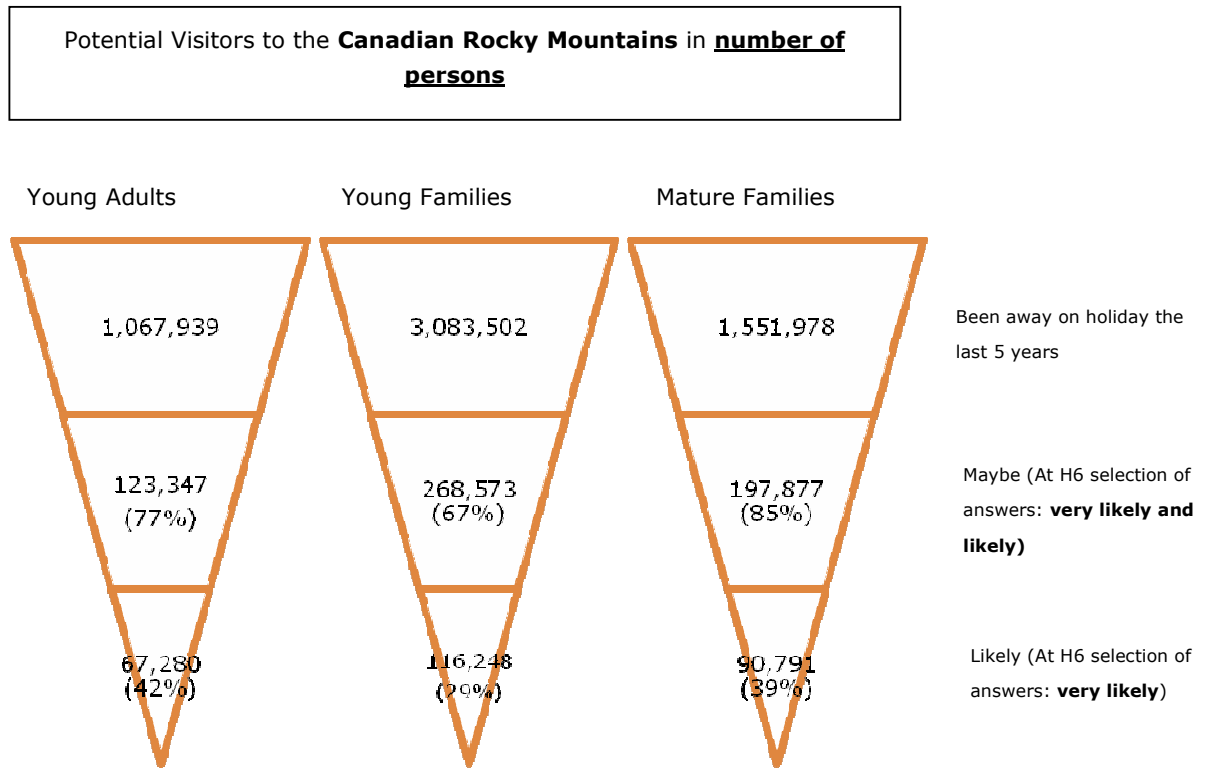


Figure 17. Potential Visitors to the Canadian Rocky Mountains in number of persons

8. TRAVEL ALBERTA

8.1 Awareness of Travel Alberta

Awareness of Travel Alberta is extremely low in all three life stage groups. This is to be expected as awareness of Alberta is also quite low. Respondents who were aware of Travel Alberta were asked if they recalled Travel Alberta's slogan. None of the respondents were able to remember the slogan "Home of the Canadian Rockies" without prompting.

8.2 Travel Alberta.nl

The respondents were directed to the new Dutch Travel Alberta website via a hyperlink and asked to browse the site. They were then questioned regarding their impressions. The site makes a good overall impression. All three life stage groups gave the website a mean average rating of between 7.1 and 7.3 out of 10. The Dutch are very critical when rating websites and other communication, so these ratings are very good, since the benchmark average rating is 6.2 for websites in general.

According to the respondents, the website is professional, well structured and it is easy to navigate through the website. The respondents were also positive about the information presented on the site.

Between 38% and 50% of the respondents in the three life stage groups indicated that the website had a positive impact on their perception of Alberta. The fact that these percentages are so high is another indication of how positively the website is received.

The website has a positive impact on Alberta's image for the following reasons:

- The website gives a better image of the province and what it can offer
- The website offers interesting information about nature and sightseeing
- The website looks professional
- Beautiful pictures

The website has a neutral impact on Alberta's image for the following reasons:

- No interest in the province and the website does not change that

- Already have a (positive) image of the province and the website does not change that (positive) image
- Did not know Alberta and had no image of Alberta and the website offered information, but not enough to form a strong opinion
- A website is not enough to change an opinion

Although the respondents were positive about the website in overall terms, the site does not change Alberta’s image as a holiday destination. Most of the respondents still feel that Alberta is ‘boring’ or ‘corny’ after seeing the website. The overall look and feel of the website, the logo and the photographs make a somewhat old-fashioned impression, thus adding to the dullness and corniness of Alberta’s image.

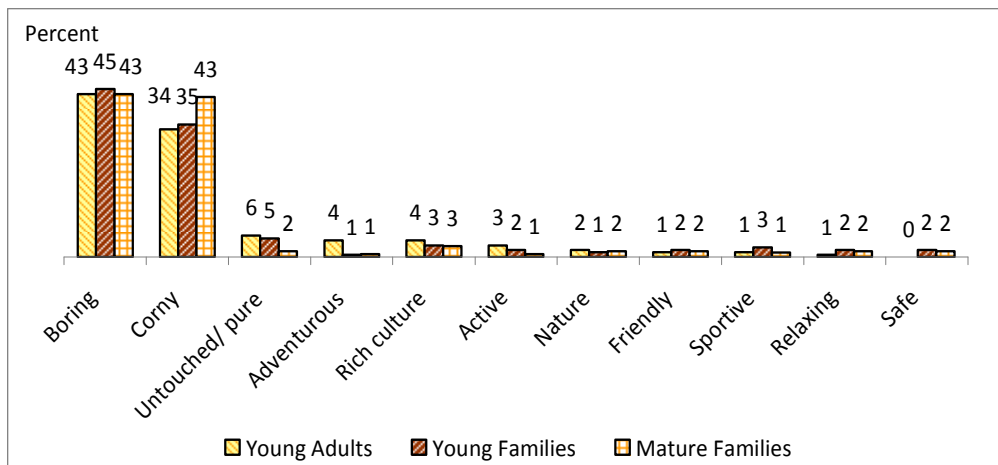


Figure 18. Based on the website, what is your image of Alberta as a holiday destination?

As section 3.2 reveals, Dutch travellers use multiple sources to gather information on Alberta. The website offers visitors a wide range of different topics and fulfils their need for various types of information.

When asked what type of information they found on the website, the answers given by the three life stage groups were spread across the entire spectrum of possible answers. The respondents were clearly able to find a wide variety of different types of information on the website.

Most of the suggestions for improvements related to the site layout (28%). The respondents suggested using different colours, more photographs, larger fonts and other fonts. 14% of the respondents stated that the information on the site should be presented in Dutch. 5% stated that the amount of text on the site should be decreased or that the option of booking via the site should be added.

8.3 Training video

Dutch travellers who have been to Alberta do not feel that the Alberta training video shows Alberta in the best possible light. According to them, it is wildlife, unspoiled nature and the Rocky Mountains that are representative of Alberta, not the cities, events and entertainment that are highlighted in the video.

The training video makes a rather busy impression, due both to the way in which it is filmed and the manner in which it depicts things to do in Alberta. The video lacks the quiet feel that Dutch travellers associate with Alberta and that is the main driver for visits to Alberta. The image of Alberta portrayed in the video does not fit the needs that most travellers expect Alberta to meet when they select it as a holiday destination (i.e. the need for nature and wildlife and the need for rest, relaxation and peace & quiet).

Although they feel that the attention given to the different aspects of Alberta is not properly balanced, Dutch travellers who have been to Alberta do appreciate the fact that the video shows the diversity of Alberta. They also appreciate the information that the video offers. Although they have been to Alberta, they still do not realize how much there is to see and do in Alberta because their trips were largely limited to Jasper, Lake Louise and Banff. Some did visit Edmonton and some did visit Calgary, but many of the attractions shown in the video are new to them, particularly attractions that are off the beaten path, such as Drumheller and Dinosaur Provincial Park.

8.4 Role of Travel Alberta according to experts

Overall, the experts have a positive attitude towards Travel Alberta. However, some of the experts believe that Travel Alberta could be more active and more prominent than it currently is.

Not surprisingly, there is a strong correlation between opinions of and overall attitudes towards Travel Alberta and the intensity and quality of the relationship between the different travel trade organizations and their Travel Alberta contact person. If the relationship is good, opinions and attitudes are positive; obviously, the opposite also holds true. The contact person is expected to have extensive knowledge and to be truly involved with the country and the travel trade organization.

All of the representatives are unhappy about the departure of the Canadian Tourism Commission (CTC) ("verkeersbureau") from the Netherlands several years ago. Some miss it as a source of information, for both themselves and their customers. Many see the departure of the CTC as a reflection of the general lack of attention for Canada. This

appears to result in higher expectations for Travel Alberta. Travel trade experts feel that Travel Alberta should compensate for the departure of the CTC, that Travel Alberta should be more active in promoting Canada in the Netherlands. To raise awareness of Canada, several travel trade organizations have joined forces in the Canadian Marketing Committee (CMC).

In overall terms, the experts are satisfied with what Travel Alberta currently does for them, but they would like to see Travel Alberta work harder to raise awareness on the part of consumers.

In addition to meeting this need, the travel trade organizations feel that Travel Alberta can make improvements in what it offers them. Most of the suggested improvements relate to offering the support that is needed to 'get Canada back on the map' in the Netherlands. Examples include:

- Supporting organizations in convincing the Canadian government to re-establish representation in the Netherlands (return of the CTC)
- Supporting organizations in professionalising the CMC
- Financially supporting the development of (smaller scale) promotions of the organizations (e.g. contributing to advertisements in newspapers, brochures, etc.)
- Organizing brainstorming sessions with Travel Alberta and the travel trade organizations, so that they can jointly develop ideas and measures to put Canada back on the map.

Other suggestions for improvements relate to the changes that travel trade experts observe in the needs of travellers (see section 2.2). Possible improvements to help travel trade organizations adjust to these changes are:

- Help the travel trade reach their new, less homogeneous target groups with new communication methods and new communication channels
- Offer more tailored products
- Offer more thematic/'experience' trips
- Help the travel trade organizations improve their websites to support the growing use by consumers
- Help strengthen the travel trade's role of advisor for trips to Canada:
 - The more they 'feel' and experience the destination, the better they sell it
 - The more they know (more unique selling points), the better able they are to convince Dutch travellers to stay longer in Alberta.
 - To achieve this, different levels in the organization must be informed (particularly employees who are in direct contact with clients and sell the trips) in a lively and active manner:

- Organize/offer more study tours to give (desk) employees the chance to experience Alberta themselves
 - Organize information days (by Travel Alberta or in co-operation with the travel trade organizations) to provide the travel trade organizations with in-depth information on the different Canadian provinces (or on Alberta exclusively)
 - Organize/support internal training programmes on Western Canada and Alberta for travel trade employees
 - Maintain good relationships with travel trade organization contact persons. One way to achieve this is to pay visits to the travel trade organization's office for a more comprehensive, face-to-face exchange of information with greater depth than is possible at a trade fair.
- Offer inspiration/tips for tours (e.g. travel brochures)
 - Offer tips for travel themes (e.g. First Nations Tour)
 - Supply good quality photos for the travel brochures (Travel Alberta has already undertaken action on this matter)

9. MEDIA BEHAVIOUR

This section gives insight into the media behaviour of the three life stage groups.

9.1 Television

The three life stage groups have similar preference as regards television channels. The most popular channels are RTL 4, Nederland 1 and SBS6.

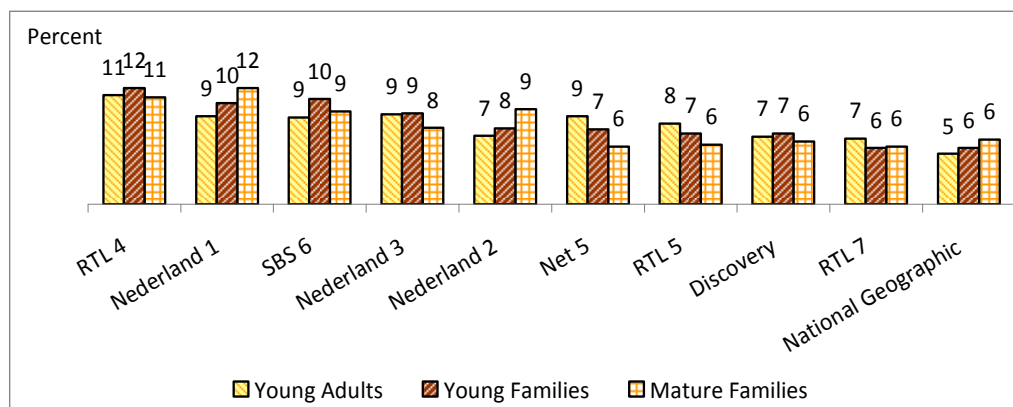


Figure 19. Can you indicate which channels you watch regularly? (TOP 10)

The three life stage groups regularly watch 'news and current affairs', 'documentaries' and 'informative programs'. 'Travel' and 'nature' programmes are more popular with Mature Families than with the other life stage groups. 'Action series' and 'action movies' are more popular with Young Families and 'comedy series' are more popular with Young Adults.

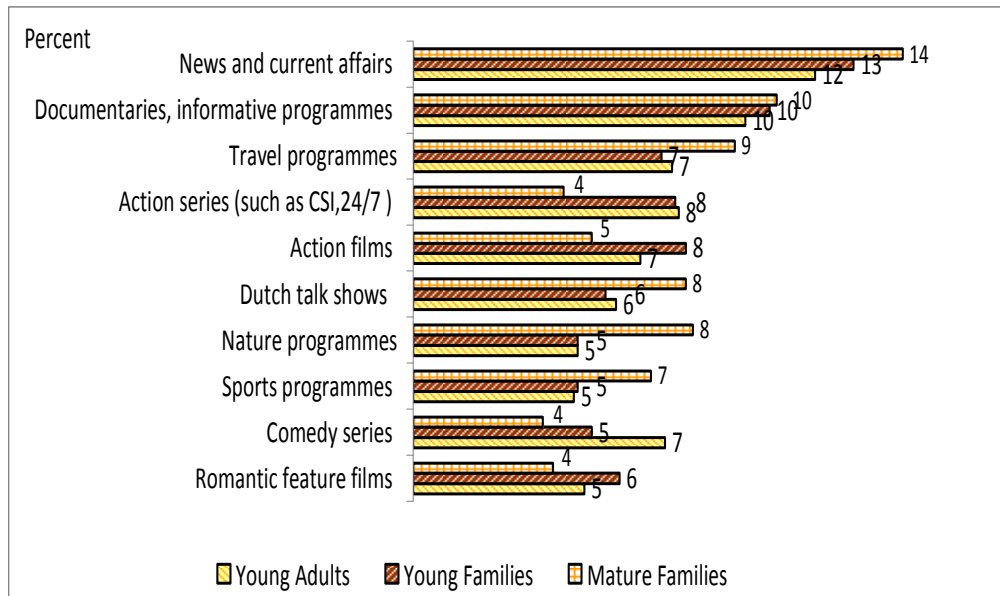


Figure 20. What type of television programs do you watch regularly? (TOP 10)

9.2 Radio

Radio 538, Sky Radio, 3Fm and Q-music are the most popular radio stations with the three life stage groups. Their preferences mirror those of the general Dutch population. Mature Families listen to Radio 1, Radio 2 and regional radio channels more frequently than the other life stage groups.

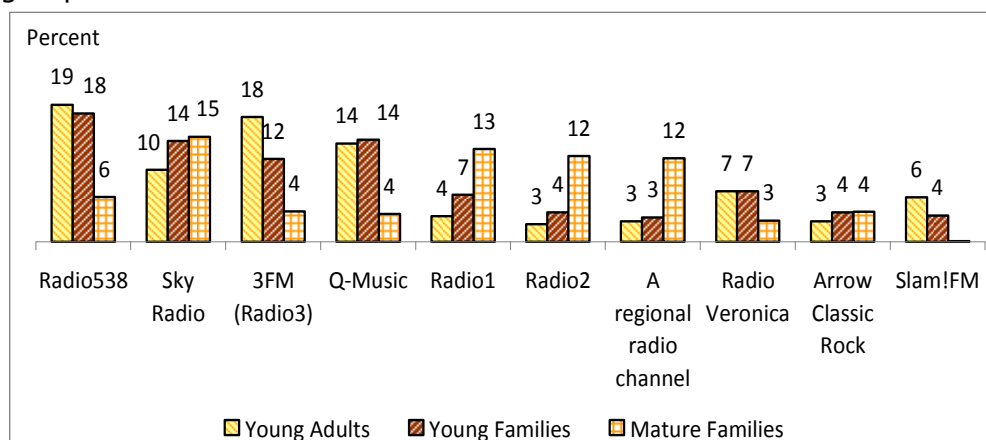


Figure 21. Which of the radio stations below do you listen to regularly? (TOP 10)

9.3 Internet

There is little difference between the three life stage groups in terms of internet use. All three life stage groups use the Internet most frequently for e-mail, banking and searching via search engines such as Google.

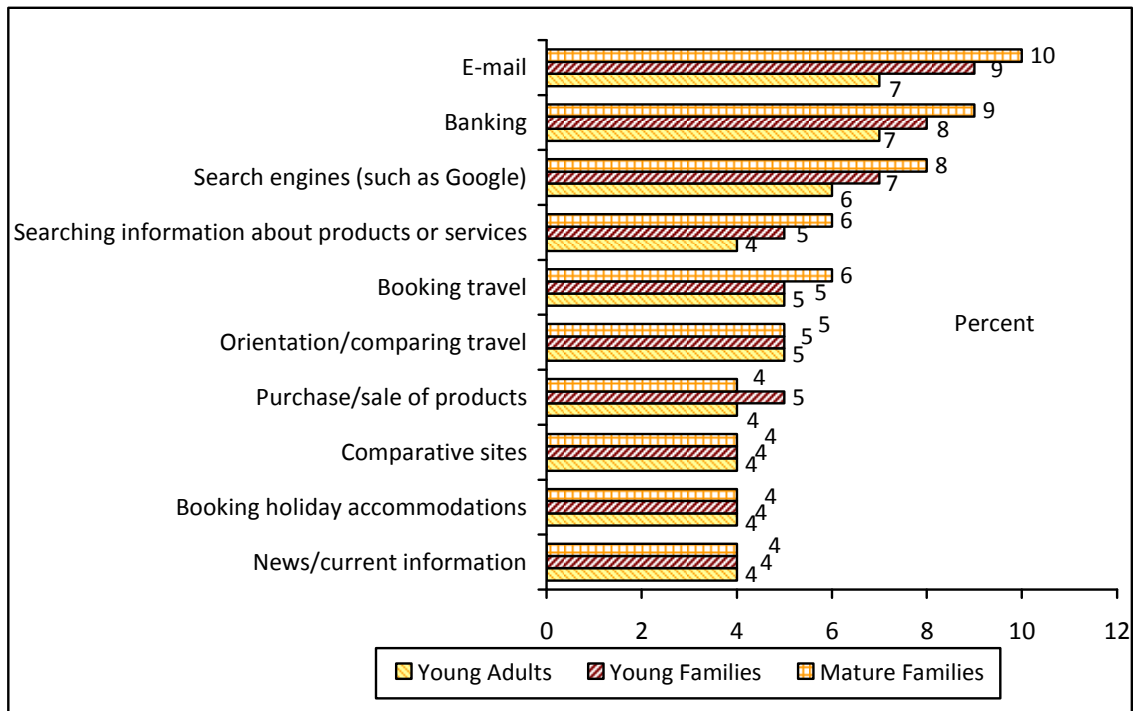


Figure 22. What do you use the internet for? (TOP 10)

9.4 Magazines and Newspapers

Readership of women’s magazines is high in all three life stage groups. Readership of sponsored magazines and travel and leisure magazines is highest in the Mature Families life stage group. Readership of family magazines is higher in the Young Families life stage group than in the other life stage groups.

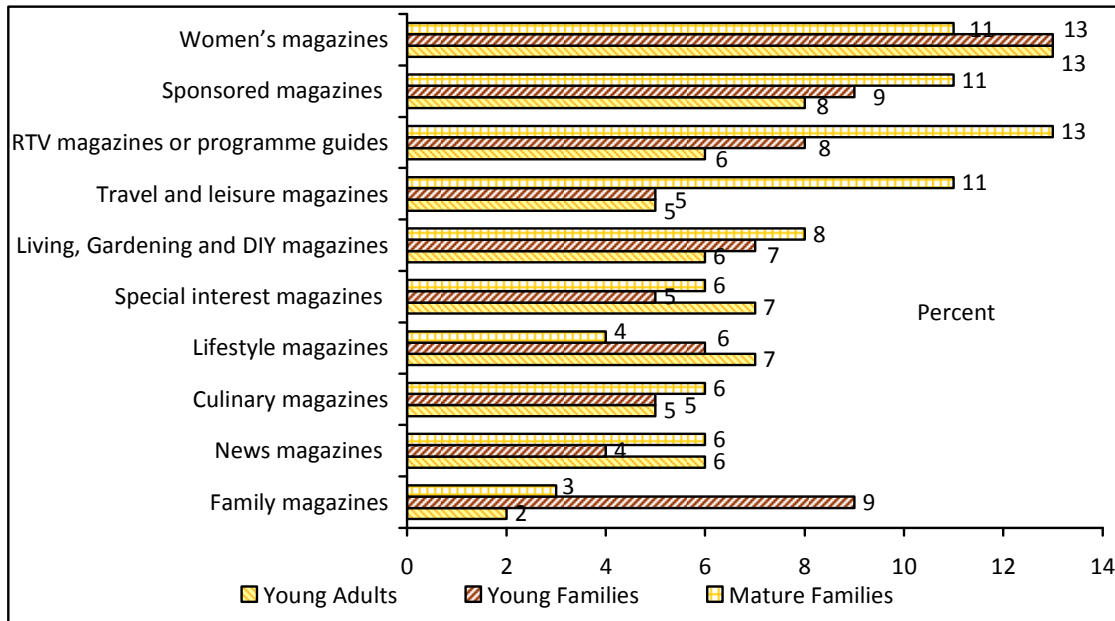


Figure 23. Which of the magazines do you read regularly? (TOP 10)

Readership of regional daily newspapers is high in the Netherlands and this is reflected in the reading habits of the three life stage groups. Readership of free newspapers such as Metro and Spits, both of which are distributed in metro and train stations throughout the Netherlands, is higher in the Young Adults group than in the other life stage groups.

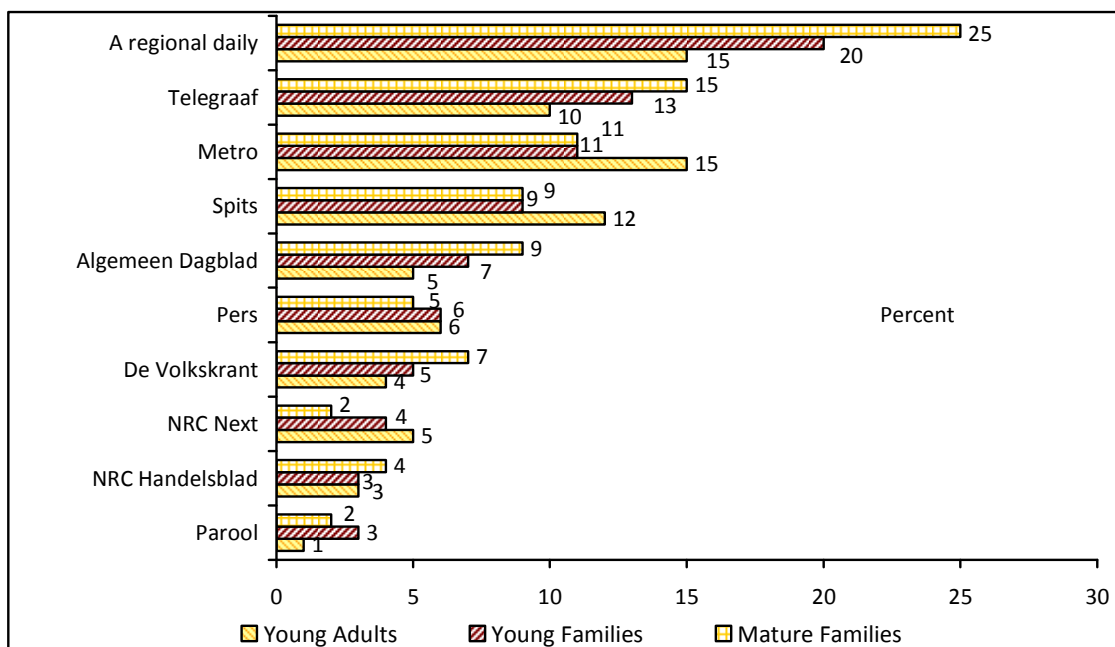


Figure 24. Which of the following newspapers do you read regularly? (TOP 10)

10. CONCLUSION

- Main overall conclusion:
Alberta (Western Canada) has opportunities in the Dutch market, provided awareness and visibility is raised.

10.1 Change in needs of Dutch travellers

- The needs of travellers are changing. Western Canada in general, and Alberta in particular, fit the changing needs well and therefore have the potential to become a more attractive destination for Dutch travellers:
 - Travellers have become more experienced and self-confident in travelling overseas, which increases the likelihood of them choosing Alberta as a destination. Dutch travellers have become less and less hesitant to travel greater distances to reach their vacation destination.
 - Alberta also fits the growing need for independence well. Alberta is well suited for individual travel by motor home and caravan and has good infrastructure and accommodations. Moreover, individual travel fits the growing need for adventure.
 - The growing need for 'experience' can also be found in Alberta, such as with rafting tours and wilderness camping.
 - Canada is not a standard or common destination and is therefore likely to be perceived as an exclusive destination.
- The observed trends have possible consequences for the approach, travel products and role of travel trade organizations:
 - Travel trade organizations need new targeting methods and communication channels in order to reach their target groups, since the needs of the target groups are less clear-cut and the target groups are more difficult to divide into segments today than they were in the past.
 - Travel trade organizations need to adapt to the continuing increase in use of the internet for information and actual bookings. Booking a holiday via the internet is preferred in all three life stage groups. The role of the travel trade organization as advisor and booker is shifting. The increased knowledge levels of today's consumers (and their ability to book independently) are

forcing the travel trade organizations into the role of facilitator.

- Travel trade organizations need to adapt to changing demand by diversifying their products and offering a larger range of tailored products. Travel organizations are changing their products to adapt to the higher need for more special, exclusive, 'experience' trips and are also adapting their offering to exploit media exposure received by certain destinations.

10.2 Information gathering, sources & bookings

- The Dutch consumer is not an impulsive booker of holidays outside Europe. The Dutch usually book 2 to 6 months in advance.
- Since the Dutch are not very impulsive and the fact Canada is not a very well known country, they inform themselves well and consult multiple sources.
- Several sources are consulted for information, such as the internet, travel agencies, family & friends, television programmes, travel fairs ('vakantiebeurs') and travel books, but also sometimes the Canadian embassy.
- Word of mouth plays the role of key influencer at different stages in the information gathering and decision-making process for holiday destinations. Word of mouth influence is found in the personal experience of travel TV programme hosts, in personal reviews on the Internet and in personal experiences in magazines and books, often with photographs, but also in the first-hand experiences of friends, family and travel agency employees.
- Some sources do well in 'raising interest' for a destination when the traveller has not decided on the destination yet. Examples are: travel programmes on television, personal stories/recommendations of friends & family or the travel agent.
- Other sources are better suited to further inform when the traveller has already decided on the destination. Examples are: internet, travel agent, and travel books.
- The internet and travel agencies are considered the most important sources of information. The internet provides very extensive information on a wide variety of subjects and is always available (allowing travellers to gather information whenever they want it). Travel agencies offer brochures, guides and personal advice. Moreover, travel agents have an important 'double' role: to trigger interest and to further inform.
- The internet is the most preferred for bookings among all three life stage groups. However, the decision to book via the Internet or via a specialized or non-specialized travel agency also depends on the type of trip booked. To organize and book more complicated trips, which

are perceived as time-consuming and hazardous to book independently, the traveller prefers to turn to a travel agent.

- Role of travel agents:
 - Travel agents have a 'double' role: trigger interest for a destination and further inform when the destination is already chosen.
 - The role of the non-specialized travel agencies is important: over 80% of the members in all three life stage groups who book their vacation outside Europe via a travel agency do so at a non-specialized travel agency with a broad offer of products.
 - The Dutch often visit a non-specialized agency when they have not yet chosen a destination. Once they have chosen a destination, they are more likely to visit a specialized travel agency.

10.3 Perception & experiences of Alberta

- Consumer awareness of Alberta is currently low.
- In general, consumers do not consciously choose Alberta; they visit Alberta as a consequence of choosing Western Canada.
- The most important motivators for choosing Western Canada are the need for nature, wildlife and the need for rest and relaxation. Often, the desire to visit family and friends who live in Western Canada plays a role, but that role is a secondary one.
- Since Alberta is not well known, its image is relatively blank. The image consumers have of Canada is often transferred to Alberta (Alberta=Canada).
- Due to the lack of awareness and more or less blank image of Alberta and Canada, Alberta and Canada are not top of mind destinations for the Dutch travellers. This is the most important barrier in attracting Dutch travellers.
- The image consumers have of Canada (=Alberta) is mostly related to aspects of nature: rugged nature, beautiful scenery, wildlife, green space, national parks, mountains, lakes, peace and quiet, fresh air and clean.
- The perception of Canada's (Alberta's) image also includes less positive aspects: dull (boring), corny and a bit stuffy.
- The main reasons for the dull and stuffy feel of Canada's image and for the lack of definition in Canada's image are:
 - The perception of Canada as a country that is primarily visited by older people.
 - The fact that Canada is a relatively 'quiet' country with limited media exposure. Travellers simply do not hear enough about Canada to develop a well defined image of the country.
 - Alberta is sometimes perceived as a bit boring due to its perceived lack of vibrant cities and entertainment. Canada and

Alberta are equivalent to 'quietness' and 'a lot of nature' in the minds of many Dutch travellers.

- Nature overall and the Rocky Mountains in particular, are the main motivators to visit Alberta.
- The perception both consumers and experts have of Alberta after their visit exceeds their expectations: more immense, magnificent, enormous, rugged, mystic, peaceful, quiet, pure, healthy, clean, relaxed, natural, and friendly, helpful people.
- The trip to Alberta is often combined with a visit to British Columbia or the US. The time spent in Alberta is often limited to the Rocky Mountains and environs: Banff, Jasper, Lake Louise and sometimes Calgary and Edmonton.
- Specific and detailed knowledge of Alberta is limited. Most Dutch travellers discover, while in Alberta, that there is much more to see and do than they expected before embarking on their trip. Had their travel itinerary not been fixed in advance, they would have spent more time in Alberta, at the expense of British Columbia.

10.4 Interest in Canada, Alberta & the Rocky Mountains

- The interest of Dutch tourists in Canada in general and Alberta in particular has been stable over the last few years. In general, interest in British Columbia has been higher than interest in Alberta because awareness of British Columbia is higher.
- The experts have two divergent expectations regarding the future level of interest in Alberta as a vacation destination:
 - Declining interest due to the stronger position of the US in the tourism industry (low US dollar), decreased contact with relatives in Canada and a decreased number of direct flights to Alberta.
 - Increasing interest as a holiday destination if awareness of Canada and Alberta increases.
- We expect the popularity of Western Canada and Alberta as a holiday destination with Dutch travellers to increase (if awareness is increased) since Western Canada and Alberta fit the changing needs of Dutch travellers well.
- Overall, the attitude of consumers themselves regarding visiting Alberta again in the future is quite positive. The intention to visit Alberta again is slightly lower in the Mature Family group.
- The overall intention to visit the Canadian Rocky Mountains is much higher than the intention to visit Alberta. This results in a higher calculated potential for the Canadian Rocky Mountains than for Alberta and shows the popularity of the Rocky Mountains and the fact the Dutch are unaware that the Rocky Mountains are in Alberta.
- The calculated potentials are highest for the Mature Family group and the Young Adult group and lowest for the Young Family group.

10.5 Attitude & needs regarding Travel Alberta

- Overall, travel trade experts have a positive attitude towards Alberta. Alberta offers the Rocky Mountains and immense stretches of unspoiled nature and space where visitors can relax and enjoy a variety of outdoor activities. Alberta is an important destination for the travel trade experts, since it is often used as a starting point for travellers to Western Canada. The travel trade representatives feel that Alberta's most important weaknesses are its perceived lack of vibrant cities and the lack of direct flights to Calgary and Edmonton from Amsterdam.
- Overall, the experts (particularly Canada specialists) show a willingness to invest in Alberta as a destination, but they also see barriers and are resistant to the idea of promoting Alberta as a destination on its own. Dutch travellers (until now) want to combine a trip to Alberta with British Columbia because it adds value and offers more variety to tourists than Alberta. British Columbia compensates for the perceived lack of vibrant cities in Alberta with Vancouver and adds more variety in nature with the presence of Vancouver Island and the coast.
- Travel trade organizations want Travel Alberta to give priority to raising awareness of and interest in (Western) Canada. Canada and Alberta are not very visible (lack of attention) in the Netherlands and are therefore not a top of mind destination for Dutch consumers.

10.6 Evaluation of video & website

- Overall, the video of Alberta is perceived as not representative of Alberta. The image of Alberta portrayed in the video does not fit the needs that most travellers expect Alberta to meet when they select it as a holiday destination (i.e. the need for nature and wildlife and the need for rest, relaxation and peace & quiet).
- The relative amount of attention given to the different aspects of Alberta is perceived as wrong: too much focus on cities, events and entertainment and activities such as rodeos and cowboys and too little focus on nature, villages and rest & relaxation. However, the fact that the video shows the diversity that Alberta offers is seen as positive.
- Although in overall terms the website was evaluated positive (well structured, easy to navigate, good information), the site does not change Alberta's image as a holiday destination. Most of the respondents still feel that Alberta is 'boring' or 'corny' after seeing the website. The overall look and feel of the website, the logo and the photographs make a somewhat old-fashioned impression and thus strengthen the dullness and corniness of Alberta's image.

11. RECOMMENDATIONS

11.1 State of affairs & how to move forward

- There are opportunities in the Dutch market. The most important barrier that needs to be resolved in order to exploit these opportunities is the fact that Western Canada is not a top-of-mind destination for Dutch consumers. If Travel Alberta decides to invest in the Dutch market, we recommend that the primary focus be placed on consumers, with a secondary focus on travel trade organizations.
- To trigger more interest in the minds of Dutch consumers, it is important for Western Canada to increase awareness and knowledge of the area and to take a more explicit position in the market
- Perceived barriers must be broken down: the perception of Canada as boring, corny and stuffy, a country for older people and the misperception that there is nothing to do in Alberta except visit the Rocky Mountains.

Alberta (Western Canada) is not top of mind → lack of visibility and limited knowledge and perception

Image is not optimally loaded and includes negative aspects: boring and corny

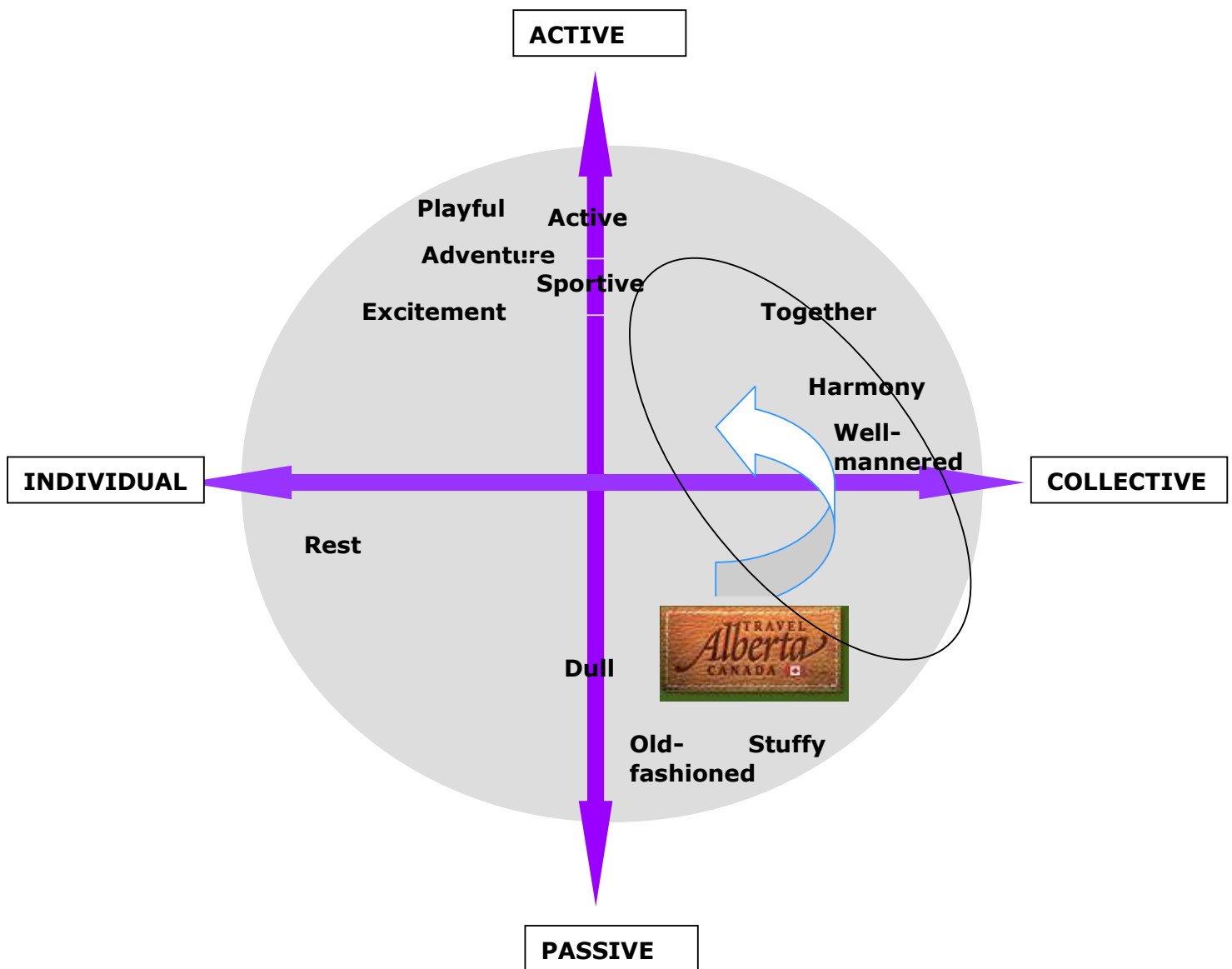
Due to lack of visibility and limited knowledge and perception Canada in general → low awareness of Alberta and copied image of Canada including boring and corny

**What
needs to
be done**

Increase visibility: make Canada & Alberta visible: use multiple sources

Take a more explicit position in the market: more focus on active, fresh, adventure, fun, and excitement, without losing essence (nature, rest, space)

- Reverse the image Western Canada & Alberta to eliminate the boring and corny image. Focus more on: active, fresh, adventure, fun, excitement without losing its essence: nature, space, rest.
- Expressing and 'owning' some relatively self-centered aspects is likely to shift Alberta from collective-passive towards collective-active
- Visualized:



11.2 Recommended promise & target group

- The main motivator for choosing Alberta is the Rocky Mountains, which offer nature and wildlife and fulfils the need for rest and relaxation. Therefore, we recommend continuation of the focus on the Rocky Mountains.
- However, since “a lot of nature” also includes a certain ‘lack of variety’ and to prevent it from coming across as dull, it is important to illustrate the diversity, activity, fun and excitement of the Rocky Mountains and its surroundings in future communication.
- Broaden the target group: Western Canada and Alberta meet a variety of needs and these needs cross a range of different target groups, from (well-earning, Dutch social classes AB1) younger to older people. Focussing on a variety of needs and therefore a more diverse target group will not only help attract more travellers, but will also help modernize Canada’s image:
 - More focus on needs than demographics: down to earth, active, sporty, outdoor/adventurous travellers who love nature and want relaxation and peace & quiet.
 - When focussing on demographics:
 - Focus on Dutch seniors (50+) remains an important target group since they constitute a steadily growing share of the population and have a lot of free time for a longer holiday.
 - But also focus on Young Adults aged 30+ without children because: high intention & calculated potential and interest in adventure (fits relatively ‘unknown’ country like Canada).

What you offer: your promise

- Keep core and strength: “Alberta, home of the Canadian Rockies”, with impressive nature, wilderness and wildlife of unimaginable vastness
- YET communicate it differently →
 - more modern / contemporary
 - more active, slightly younger approach
 - emphasize diversity and outdoor activities/potential
 - add excitement in your tone of voice

For whom: your target group

- Focus more on *needs* than on demographics: your target is down to earth, active and sporty and are outdoor/adventurous travellers who love nature and want relaxation and peace & quiet
- Mature Families, yet also Young Adults

11.3 Recommended steps translated to consumers, sources & travel trade

Main overall conclusion:

Alberta (Western Canada) has opportunities in the Dutch market *provided* awareness and visibility is raised

Step 1



Recommended:

Raise awareness Western Canada & Alberta

Step 2



Recommended:

Reverse the image of Western Canada & Alberta

Step 3



Recommended:

Inform: raise knowledge of (the province) Alberta

11.3.1 Consumers

- In our opinion, focussing on attracting more visitors is most profitable: with the same effort, more is gained in comparison to attracting visitors to stay longer or to pay a repeat visit to Alberta.

Raise initial interest: to attract more visitors:

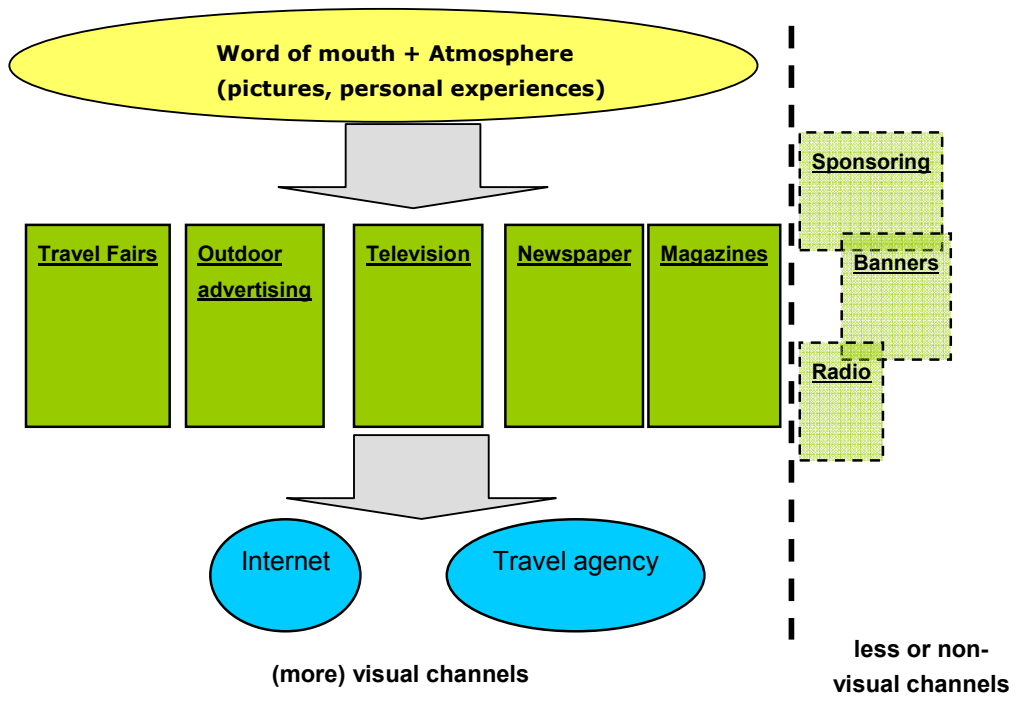
- The choice of Alberta as a holiday destination is a consequence of choosing Western Canada as a holiday destination. Dutch travellers rarely consciously choose Alberta. Hence, it is important to trigger interest on the part of Dutch travellers in Western Canada and then to draw them towards Alberta. Alberta will automatically profit from a heightened awareness of Western Canada and from improvements in the image of Western Canada.
- We do not know if a partnership between Alberta and British Columbia is desirable or possible, but we recommend focusing on Western Canada if it is. In effect, this focus would consolidate the strengths of Alberta and British Columbia. The two provinces are inexorably bound and can exert a stronger appeal for travellers if they promote themselves together.

Further inform: to encourage travellers to and in Alberta to stay longer or to trigger a repeat visit:

- Given the fact that Dutch travellers put a great deal of time and effort into information gathering and given the fact that booking a holiday to Alberta is not an impulsive act, Travel Alberta has the time to give Dutch travellers information prior to their trip to Alberta.
- To encourage travellers to spend more time in Alberta or to raise interest in a repeat visit, they need to be better informed regarding what there is to see and do in Alberta before they make their decisions, but they also need to be informed during their stay (e.g. based on local promotions.).
- By extending the travellers' knowledge on the variety of activities of the Rocky Mountains and its surroundings, but also by paying attention to Alberta's other unique selling points:
 - Alberta has a variety of natural attractions and activities to offer, not only in the Rocky Mountains, but also in other parts of the province: hiking, wildlife viewing, caves to explore, climbing, hunting, cycling, biking, golfing, horseback riding, hot springs, rodeos, working on guest ranches, rafting, kayaking, shopping in the world's largest shopping mall, dogsled tours, (cross-country) skiing.
 - Alberta has culture and heritage (First Nations, aboriginal art, dinosaurs, historic sites).

- Alberta is well suited for both winter and summer holidays.
- Alberta is well suited for both an active holiday (outdoor, activity, sports) and a relaxing holiday (hike, quiet, space).

11.3.2 Recommended sources



Sources to raise interest:

- We recommend focusing first on sources that have the ability to raise interest. Once the traveller has decided on a vacation destination, different information sources are used to further inform and educate the traveller on the chosen destination.
- Word of mouth (=enthusiasm/experiences of third parties) and aspects that show atmosphere and bring the destination to life are very important in arousing initial interest and making Canada and Alberta a top of mind destination: television, magazines, newspapers, travel fairs and outdoor advertising (e.g. posters). Banners, radio and sponsoring are also good sources to raise awareness, but they lack the atmosphere and are therefore less powerful.
- These sources will trigger the consumer to the internet and travel agencies for further information or actual bookings.

Sources to further inform when already decided on destination:

- Travel programmes on television, travel books, travel fairs, magazines and newspapers.
- It is recommended to use sources which address the above 3 steps: raise interest and further inform and fill in the image.

Recommendations for the Travel Alberta.nl website

- The website was received quite positively and should definitely be used to promote Alberta.
- Although the respondents were positive about the website, it did not change Alberta's image as a holiday destination. Most of the respondents still felt that Alberta was a bit 'boring' or 'corny' after seeing the website. We therefore recommend:
 - Modernizing the overall look & feel of the website.
 - Reserve a prominent role for the Rocky Mountains on the website. The Rocky Mountains are the most important motivator for tourism to Alberta amongst Dutch travellers.
 - Make the website livelier, with more exciting photographs of nature and wildlife which illustrate activities: bring Alberta to life on the website!
 - Make it possible for site visitors to upload reports, reviews, testimonials and photographs of their holiday in Alberta to exploit the power of word of mouth advertising.
- We also recommend that banners for Alberta be placed on websites which are often visited by the target group (e.g. travel related websites, websites of non-specialized agencies, but also websites like marktplaats.nl, schoolbank.nl)

11.3.3 Recommendations for travel trade organizations

- Besides continuing to inform specialized agencies, we recommend a focus on non-specialized agencies since they offer high opportunity to raise interest for Alberta.
- We recommend that Travel Alberta focus on both specialized and non-specialized travel agencies, but the focus needs to be tailored:
 - Non-specialized agencies: opportunities to trigger initial interest in Alberta:
 - Within the large offer of destinations, profile Alberta more prominently.
 - Get more information to travel outlets and travel trade employees, offer brochures and media packs that can be used to enhance travel trade websites.

- Lively presentation of Travel Alberta at travel agencies.
 - Offer study tours.
- Specialized agencies: opportunities to prolong the stay in Alberta:
 - Further inform travellers regarding the possibilities.
 - Study tours.
 - Stimulate travellers to opt for an open itinerary.
- Although Canadian specialists have higher awareness and knowledge levels and a fairly good image of Canada and Alberta, there is still room for improvement.
- More effort by Travel Alberta will need to be invested to improve knowledge of the non-specialized agencies.
- We recommend reaching different levels in the trade travel organizations when informing staff about Alberta, especially the desk employees.
- Travel Alberta can help the travel trade organizations by:
 - Offering more support and financial resources in promoting Western Canada/Alberta in the Netherlands.
 - Support the travel trade in adjusting to the changes in today's market:
 - Less homogeneous target groups, resulting in the need for new communication types and channels.
 - Offer more tailored products.
 - Offer more theme-based and 'experience' trips.
 - Increase use of the Internet;
 - If possible, support the travel trade in improving the internet as a source of information and booking channel.
 - Help strengthen the travel trade's role in advising and selling trips to Western Canada:
 - The more they 'feel' and experience the destination, the better they sell it.
 - The more they know the unique selling points, the better able they are to convince Dutch travellers to remain longer in Alberta.
 - To achieve this, it is recommended that Travel Alberta:
 - Organize/offer more study tours to give employees who are in direct contact with clients and sell the trips, the opportunity to experience Alberta themselves.
 - Organize information days (either alone or in co-operation with the travel trade organizations) to inform them about the different Canadian provinces (and/or on Alberta exclusively).
 - Organize/support internal training programmes for employees on Western Canada and Alberta.
 - Maintain good relationships with travel trade organization contact persons.

- Supply good quality, up-to-date photos for travel brochures to show the country's atmosphere and give prospective travellers a 'sneak preview' of the Canadian experience.

12. POINTS OF DISCUSSION

- The key recommendation in this report is to increase awareness of Alberta. Increased awareness will help attract more travellers to Alberta, help keep them in Alberta longer and help get them back to Alberta again.
- Possible strategies that can be used to achieve these goals are given below as discussion points.

Target	Possible strategy
Attract more visitors to Alberta	<ul style="list-style-type: none"> • Improving awareness & knowledge of what there is to do and see in Alberta of: <ul style="list-style-type: none"> ○ New target groups ○ And current target group
Longer visit in Alberta	<p><u>Via travel trade</u></p> <ul style="list-style-type: none"> • Improve knowledge and experience of experts <p><u>Directly to consumers</u></p> <ul style="list-style-type: none"> • Convince consumers to spend more days in Alberta (which entails stealing them away from British Columbia) by improving knowledge of consumers on what there is to do and see in Alberta, both before and during their visit
Attract visitors more often to Alberta (repeat visits)	<ul style="list-style-type: none"> • Improve knowledge on what there is to do and see while visitor is in Canada, (e.g. via local promotions)

- Relatively speaking, the number and diversity of trips offered to Alberta is lower than the number and diversity of trips offered to British Columbia. A relatively low diversity in trips offered will translate into a relatively low diversity in the behaviour of visitors to Alberta. The influence that diversity has on interest in Alberta and on the appeal of Alberta as a holiday destination is a point for discussion.
 - Will a larger product offering increase demand?
 - Will a more diversified offering (different routes in Alberta) help inform consumers that Alberta offers variety and trigger interest in spending more time in Alberta (at the expense of British Columbia)?

APPENDIX

Online Consumer Questionnaire

Questionnaire:

Administered during the last week of January 2008

Sample:

All of the respondents have been on holiday outside of Europe at least once in the past five years.

- Young adults: household made up of one or more people all aged 18-35 without children (may include single member households).
- Young families: household made up of more than one person aged 25-49, with at least 1 child aged under 18 full time living at home
- Mature families: household made up of one or more people, all aged 50-74; no children living at home (household members may be single/never married, widowed, divorced, separated, married/common law, and so forth)

Fieldwork:

n= 346 Young adults

n= 341 Young families

n= 342 Mature families

Introduction to the Alberta questionnaire

We are currently conducting a large research project into, among other things, your holiday plans, into how you book a holiday and what your motivation is for choosing a specific holiday destination.

The questionnaire will take approximately 20 to 25 minutes.

Thank you for your time!

PART S: SELECTION

<No return>

S0. Have you been on holiday outside of Europe at least once in the past five years?

- Yes
- No -> end of questionnaire
- Don't remember -> end of questionnaire

PART A: TRAVEL BEHAVIOUR

<No return>

A1. How many times a year do you go on holiday outside of Europe?

- Once a year
- Twice a year
- 3 times a year or more
- Less than once a year, but at least once every two years
- Less than once every two years, but at least once every five years.

<No return>

A2. When you go on holiday outside of Europe, how long do you go on average?

- 1 week
- 2 weeks
- 3 weeks
- 4 weeks
- Longer than 4 weeks
- Don't know

<No return>

A3. What type of holiday do you prefer?

<randomize>

- Cultural holiday
- Nature holiday
- City trips
- Sports/ active holiday
- Beach holiday
- Adventurous holiday
- Relax holiday
- Rail Tour
- Cruise
- Camper tour
- Other
- Don't know

B: ORIENTATION & BEHAVIOUR

<No return>

B1. When planning to go on holiday, different sources about travelling and destinations are available for consultation. What sources do you use when orienting yourself for a journey or destination outside of Europe?

<multiple answers possible>

<randomize>

- Door-to-door papers
- Radio programs
- Travel programme on television

- Articles in newspapers/magazines
- Advertisements in newspapers/magazines
- Speak to a travel agent
- Picked up brochures, folders, maps, etc. from a travel agency
- An electronic newsletter or magazine received by e-mail
- Travel guide books such as Marco Polo, LonelyPlanet, etc
- Advice of friends or relatives/word-of-mouth
- Visits to fairs (holidays, sports, etc)
- Programs on television
- Advertisements on television
- Travel information received in the mail
- Past experience/been there before
- Maps
- Official travel guides or brochures from provincial/state/national organizations
- Search engines on the Internet
- A travel planning/booking website (e.g. Expedia, Travelocity)
- An airline's website
- The website of a country/state province/or city tourism authority
- The website of a hotel or resort
- A tour company website
- A cruise line website
- The website of an attraction (museum, theatre, amusement park, etc.)
- Some other website
- ANWB
- Other
- None
- Don't know

<No return>

<In case of holiday fairs under B1 >

B2. You have indicated that you visit a trade, travel, or sportmen's show when orienting yourself for a journey or destination. What fairs do you sometimes visit?

<multiple answers possible>

<randomize>

- Vakantiebeurs in Utrecht
- International Holiday Salon in Antwerp
- Cycle and Tramping Fair
- Reisemesse Köln International in Cologne
- 50 Plus fair
- An information day from a travel agency in general for example Djoser or Shoestring

- Other fair, namely

<No return>

<In case of travel programmes under B1>

B3. What travel programmes do you sometimes watch when orienting yourself for a holiday destination outside of Europe?

<multiple answers possible>

<randomize>

- RTL travel Adrenaline
- Boarding Now
- 3opReis
- Campinglife
- Via Vacance
- Airport
- Peking express
- Lekker weg op het water
- Rail Away
- Other, namely

<No return>

<If at B1 folders/brochures travel agency and/or travel agencies >

B4. You have indicated that you visit travel agencies or use brochures of travel agencies when orientating on a holiday outside Europe. Which of the following statements applies to you most?

- When I visit a travel agent I do not know yet where I would like to travel to
- When I visit a travel agent I have some sort of idea where I would like to travel to
- When I visit a travel agent I know to which country I would like to travel to
- When I visit a travel agent I know exactly to which destination I would like to travel to

<No return>

< If at B1 folders/brochures travel agency and/or travel agencies >

B5. For what reason do you visit a travel agent?

<multiple answers possible><randomize>

- More information on a country / destination
- Compare prices
- Advice on a country/ destination
- To actually book a holiday
- To be certain there is no better offer/ alternative
- Other namely....

<No return>

B6. When do you actually book the holiday outside of Europe?

- At least a year before departure
- A half year before departure
- A couple of months before departure
- A month before departure
- Two weeks before departure
- I hardly take any time to plan before departure

<No return>

B7. How do you usually book your holidays outside of Europe?

<randomize>

- Through a travel agency
- I book directly by Internet
- I book by telephone at a travelling agency, touroperator

<No return>

<In case of travel agency under B7>

B8. What kind of travel agency?

<randomize>

- A travel agency specialised in the country that I'm planning to visited
- A travel agency with a broad offer of holidays

<No return>

<In case of without travel agency under B7>

B9. When you book directly by Internet, which of the following applies to you?

<multiple answers possible> <randomize>

- I book via a website that only offers flight tickets and not accommodations etc. (for example Vliegtickets.nl)
- I purchase airfares via an airline website (for example KLM.com)
- I book via a holiday/ travelling website, a site that offers both flight tickets as well as accommodations (eg inpakkenenwegwezen.nl, expedia.nl)
- I book my holiday via a website of a travel agency that also has offices in the Netherlands that you can visit (eg D-reizen)
- I purchase admission tickets for special events and attractions using the respective website
- I make automobile and camper reservations via websites

<No return>

B10. What do you prefer when booking a holiday outside Europe?

<randomize>

- I prefer to book only my airline ticket in advance
- I prefer to book my airline ticket and accommodation in advance
- I prefer to book my automobile/camper reservations in advance

- I prefer to book my flight ticket, accommodation and other arrangements (eg excursions) in advance
- No preference
- Don't know

<No return>

B11. When you book your holiday outside of Europe which of the following mostly applies to you?

<randomize>

- I book a group holiday
- I travel on my own
- I travel with my friends
- I travel with my partner
- I travel with my family

<No return>

B12. When you are on a holiday outside Europe, what kind of accommodation arrangements do you use most often?

<randomize>

- Hotels
- Hostels
- Caravan
- Camper
- Tent
- Bed & Breakfast
- Apartment
- Lodge
- Other, namely

C: TRAVEL MOTIVATION

<No return>

C1. What are the 3 most important reasons for you to book a holiday outside of Europe?

<maximum of 3 answers possible>

- The weather
- New, unknown territory
- Culture
- Visit family/friends
- Nature
- Metropole
- Sport activities like bicycling, hiking, mountain climbing etc.
- Beach
- Sightseeing
- Other, namely
- Don't know

<No return>

C2. What are the 3 most important reasons for you to choose a certain country outside Europe to visit on holiday?

<randomize>

<maximum of 3 answers possible>

- Friendly population
- Political climate
- Security
- Good infrastructure
- Good facilities
- Good accommodations/camping possibilities
- Easy to travel through
- Good hygiene
- Metropole
- Western culture
- To speak the local language
- Sightseeing
- Climate
- Nature
- Peace and quiet
- Adventurous
- Other culture
- Sportive activities like bicycling, hiking, mountain climbing etc.
- Visit family/friends
- Wildlife (animals)
- Recommendation by others
- Experience by my own
- Nice for the children
- Other, namely

<No return>

C3. How important is it to you to have the information about a holiday destination or holiday country in Dutch?

- Very important
- Important
- Not important, but also not unimportant
- Unimportant
- Very unimportant

D: FAMILIARITY WITH ALBERTA

<no return>

D1. Have you ever heard of Alberta?

<randomize>

- Yes, it is a country

- Yes, it is a city
- Yes, it is a province
- Yes, it is a river
- Yes, it is a mountain
- Yes, it is a monument
- No, I never heard of Alberta

<no return>

D2. Alberta is a province. What country do you think the province of Alberta belongs to?

<randomiseren>

- United States of America
- Canada
- Greenland
- New-Zeeland
- Australia
- Austria
- Italia
- Barbados
- Bahamas

E: CANADA: VISIT, MOTIVATION, BEHAVIOUR

<no return>

E1. Have you ever been on holiday to Canada?

- Yes
- No

<no return>

<In case of no under E1>

E2. Why have you never been on a holiday to Canada?

<multiple answers possible> <randomize>

- Too expensive
- Just never happened
- Not interested in Canada
- Not enjoyable enough
- Weather not appealing
- Not enough to do
- Too far away
- Never thought of it
- No appealing cities
- No culture
- Boring image
- Other, namely...
- Don't know

<no return>

<In case of yes under E1>

E3. How long did you stay in Canada?

- 1 week
- 2 weeks
- 3 weeks
- 4 weeks
- Longer than 4 weeks

<no return>

<In case of yes under E1>

E4. Did you go on a tour through Canada or did you mainly stay in one place?

- Tour
- Stayed in one place

<no return>

<In case of yes under E1>

E5. What were your motivations to go to Canada?

<multiple answers possible> <randomize>

- Friendly population
- Political climate
- Security
- Good infrastructure
- Good facilities
- Good accommodations/camping possibilities
- Easy to travel through
- Good hygiene
- Sightseeing
- Western culture
- To speak the local language
- Climate
- Nature
- Peace and quiet
- Adventurous
- Other culture
- Sportive activities like bicycling, hiking, mountain climbing etc.
- Visit family/friends
- Animals
- Recommendation by others
- Experience by my own
- Nice for the children
- Other, namely.....

<no return>

<In case of yes under E1>

E6. What kind of sources did you use when orienting for Canada?

<multiple answers possible> <randomize>

- Door-to-door papers
- Radio programs
- Travel programme on television
- Articles in newspapers/magazines
- Advertisements in newspapers/magazines
- Speak to a travel agent
- Picked up brochures, folders, maps, etc. from a travel agency
- An electronic newsletter or magazine received by e-mail
- Travel guide books such as Marco Polo, LonelyPlanet, etc
- Advice of friends or relatives/word-of-mouth
- Visits to fairs (holidays, sports, etc)
- Programs on television
- Advertisements on television
- Travel information received in the mail
- Past experience/been there before
- Maps
- Official travel guides or brochures from provincial/state/national organizations
- Search engines on the Internet
- A travel planning/booking website (e.g. Expedia, Travelocity)
- An airline's website
- The website of a country/state province/or city tourism authority
- The website of a hotel or resort
- A tour company website
- A cruise line website
- The website of an attraction (museum, theatre, amusement park, etc.)
- Some other website
- ANWB
- Other
- None
- Don't know

F:ALBERTA: VISIT, MOTIVATION, BEHAVIOUR

<no return>

<In case of yes under E1>

F1. Have you ever been to Alberta?

- Yes

- No

<No return>

<In case of no under F1>

F2. Why have you never been on a holiday to the province Alberta?

<randomize><multiple answers >

- Too expensive
- Just never happened
- Not interested in that province
- Not enjoyable enough
- Weather not appealing
- Not enough to do
- Too far away
- Never thought of it
- No appealing cities
- No culture
- Boring image
- Other, namely...
- Don't know

<no return>

<In case of yes under F1>

F3. How long did you stay in Alberta?

- 1 week
- 2 weeks
- 3 weeks
- 4 weeks
- Over 4 weeks

<no return>

<In case of yes under F1>

F4. During your holiday in Alberta did you only stay in Alberta or did you also go to other provinces?

- I have only been to the province Alberta
- Besides Alberta I also visited other provinces namely,....

<no return>

<In case of yes under F1>

F5. What were your motivations to go to Alberta?

<multiple answers possible><randomize>

- Friendly population
- Political climate
- Security
- Good infrastructure
- Good facilities

- Good accommodations/camping possibilities
- Easy to travel through
- Good hygiene
- To visit the cities
- Western culture
- Guest ranch experience (farm work)/trail riding
- To speak the local language
- To attend amateur or professional sporting events (e.g. speed skating, hockey, bobsled, mountain bike races)
- Sightseeing
- Climate
- Nature
- Peace and quiet
- Adventurous
- Other culture
- Sportive activities like bicycling, hiking, mountain climbing etc.
- Visit family/friends
- Wildlife (animals)
- Recommendation by others
- Experience by my own
- To visit the Rocky Mountains
- Good to combine with other provinces, such as British Columbia
- Renting a camper/motor home is cheaper in Alberta
- Nice for the children
- Other, namely.....

<no return>

<In case of yes under F1>

F6. What kind of sources did you use when orienting for Alberta?

<multiple answers possible> <randomize>

- Door-to-door papers
- Radio programs
- Travel programme on television
- Articles in newspapers/magazines
- Advertisements in newspapers/magazines
- Speak to a travel agent
- Picked up brochures, folders, maps, etc. from a travel agency
- An electronic newsletter or magazine received by e-mail
- Travel guide books such as Marco Polo, LonelyPlanet, etc
- Advice of friends or relatives/word-of-mouth
- Visits to fairs (holidays, sports, etc)
- Programs on television
- Advertisements on television
- Travel information received in the mail

- Past experience/been there before
- Maps
- Official travel guides or brochures from provincial/state/national organizations
- Search engines on the Internet
- A travel planning/booking website (e.g. Expedia, Travelocity)
- An airline's website
- The website of a country/state province/or city tourism authority
- The website of a hotel or resort
- A tour company website
- A cruise line website
- The website of an attraction (museum, theatre, amusement park, etc.)
- Some other website
- ANWB
- Other
- None
- Don't know

<no return>

<In case of yes under F1>

F7. Did you find all the necessary information that you needed when orienting for Alberta?

- Yes
- No, I missed information on.....

<no return>

<In case of yes under F1>

F8. What did you do and where have you been during your holiday in the province of Alberta?

<randomize><multiple answers >

- Canadian Rockies
- Banff National Park, Jasper National Park, or Waterton Lakes National Parks (located in the Canadian Rockies)
- Other National Parks, such Elk Island or Wood Buffalo National Parks
- Banff or Jasper townsites
- Lake Louise
- Canmore
- Kananaskis Country
- Icefields Parkway
- Dinosaur Provincial Park
- Royal Tyrrell Museum
- Visit another museum, historic site, or art gallery
- Visit the City of Calgary

- Visit the City of Edmonton
- Visit Northern Alberta
- Visit Southern Alberta
- Calgary Stampede
- West Edmonton Mall
- Sport activities such as kayaking, skiing, cross country skiing, walking, and cycling
- Attend a major festival or event
- Head Smashed-in Buffalo Jump
- Visit another First Nations facility or event
- Stay at a guest ranch
- Participate in a horseback trail ride
- Sightseeing
- Visit family/friends
- Other, namely....

G: TRAVEL ALBERTA

<no return>

G1. Are you familiar with Travel Alberta?

- Yes
- No

<no return>

<In case of yes under G1>

G2. Do you remember the Travel Alberta slogan?

- Yes, namely....
- No, I don't recall any slogans

<no return>

<In case of yes under G1>

G3. Which of the slogan below do you think belongs to Travel Alberta?

<randomize>

- Home of the Canadian Rockies
- Share the Excitement
- Spirited Energy
- Adventures in living
- Big sky country

H: FUTURE TRAVEL PLANS

<no return>

H1. Do you think you will visit western Canada, including the Canadian Rockies, within the next one or two years?

- Yes

- No, not yet, but I plan to in the next 3 or 4 years
- No, not yet, but I want to visit sometime in the future, I don't know when exactly
- No, I plan to go to eastern Canada
- No, and I don't ever plan to visit there

<no return>

<In case of no under H1 >

H2. Why do you intend NOT to go to western Canada or the Canadian Rockies?

<randomize><multiple answers are possible>

- Too expensive
- Not interested in western Canada
- Not enjoyable enough
- Weather not appealing
- Not enough to do
- No appealing cities
- No culture
- Boring image
- Other, namely...
- Don't know

<no return>

<In case of yes or not yet but in the next 3 years under H1 and E1 is no>

H3. What are your motivations to go to western Canada or the Canadian Rockies?

<randomize><multiple answers are possible>

- Friendly population
- Political climate
- Security
- Good infrastructure
- Good facilities
- Good accommodations/camping possibilities
- Easy to travel through
- Good hygiene
- Metropole
- Western culture
- Guest ranch experience (farm work)/trail riding
- To speak the local language
- To attend amateur or professional sporting events (e.g. speed skating, hockey, bobsled, mountain bike races)
- Sightseeing
- Climate
- Nature

- Peace and quiet
- Adventurous
- Other culture
- Sportive activities like bicycling, hiking, mountain climbing etc.
- Visit family/friends
- Wildlife (animals)
- Recommendation by others
- Experience by my own
- To visit the Rocky Mountains
- Good to combine with other provinces, such as British Columbia
- Renting a camper/motor home is cheaper in Alberta
- Nice for the children
- Other, namely.....

<no return>

<In case of yes or not yet but in the next 3 years under H1 and E1 is no>

H4. You have indicated that you plan or intend to go on holiday to western Canada or the Canadian Rockies. What are the chances that you will visit the province of Alberta?

- Very likely
- Likely
- Nether likely, nor unlikely
- Unlikely
- Very unlikely

<no return>

<In case of (very) unlikely under H4>

H5. You have indicated that it is (very) unlikely that you will visit Alberta when you plan or intend to go on holiday to western Canada. Can you explain this?

-

<no return>

<In case of yes or not yet but in the next 3 years under H1 and E1 is no>

H6. What are the chances you will be visiting the Canadian Rockies?

- Very likely
- Likely
- Nether likely, nor unlikely
- Unlikely
- Very unlikely

[:TRAVEL ALBERTA.NL]

Now you will be shown the website of Alberta. Please take your time to look at the website including the different components.

<no return>

I1. What mark would you give the website? If you think that the website is very good to excellent then you can rate the website with a 10. If you think that the website is very poor then you can rate the website with a 1. Of course you can also rate the website with any other mark between 1 and 10.

-

<no return>

I2. Where is this mark based on?

<randomize><multiple answers are possible>

- Pictures/photograph
- Information
- Look and feel
- Structured
- Easy to navigate through the website
- Other, namely...

<no return>

I3. Does this website influence your image of Alberta

- in a positive way
- in a negative way
- neither in a positive way nor in a negative

<no return>

I4. What is the reason that the website influenced your image <answer I3>?

-

<no return>

I5. Based on the website what is your image of Alberta as a holiday destination? If you totally agree with the characteristic then please choose number 5 if you totally disagree please choose number 1. Of course you can also chose any other number between 1 and 5

<show characteristics>

Totally disagree 1 2 3 4 5 Totally agree D/k

<random order>

- Adventurous
- Boring
- Corny
- Relaxing

- Active
- Rich culture
- Nature
- Friendly
- Sportive
- Untouched/ pure
- Safe

<no return>

16. What kind of information is important to you when you would consider travel to Alberta

<randomize, multiple answers are possible>

Information on:

- Accommodation
- Dinning & Shopping
- Cities & Towns
- Regions
- Weather
- History of Alberta
- General information about Canada
- Practical information, like visa, currency
- Events & Festivals
- Outdoor Adventures
- Local information
- Campgrounds
- Parks & Natural Wonders
- Skiing & Winter fun
- Speed skating
- Spa & Wellness
- Scenic Road Trips
- Arts & Entertainment
- Attractions
- Culture & Heritage
- Transportation
- Vacation Guides
- Packages & Tours
- Maps
- Other namely.....

<no return>

17. And what information did you find on the website?

<randomize, multiple answers are possible>

- Accommodation
- Dinning & Shopping
- Cities & Towns
- Regions

- Weather
- History of Alberta
- General information about Canada
- Practical information, like visa, currency
- Events & Festivals
- Outdoor Adventures
- Local information
- Campgrounds
- Parks & Natural Wonders
- Skiing & Winter fun
- Speed skating
- Spa & Wellness
- Scenic Road Trips
- Arts & Entertainment
- Attractions
- Culture & Heritage
- Transportation
- Vacation Guides
- Packages & Tours
- Maps
- Other namely.....

<no return>

I8. Do you have any suggestions for improving the Travel Alberta website in general?

- Yes, namely....
- No

<no return>

I9. Now that you have seen the website – which of the statements below applies most to you?

- Seeing the website sparked my interest in Alberta and I would like to go there within the next five years
- Seeing the website has sparked my interest in Alberta, but I don't know if I would go there
- Seeing the website has not sparked my interest in going to Alberta

I: MEDIA BEHAVIOUR

<no return>

J1. Below you will find a list of television channels; can you indicate which channels you watch regularly?

<randomize, multiple answers are possible>

- Nederland 1
- Nederland 2
- Nederland 3
- RTL 4
- RTL 5
- RTL 7
- RTL 8 (previously Tien/Talpa)
- SBS 6
- Net 5
- Veronica
- MTV
- TMF
- National Geographic
- Animal Planet
- Discovery
- A regional television channel
- Other channels, namely ...
- Don't know

<no return>

J2. What type of television programmes do you watch regularly?

<randomize, multiple answers are possible>

- Sports programmes
- News and current affairs
- Games/ quizzes
- Show programmes (such as Staatsloterijshow)
- Dutch talk shows
- Foreign talk shows
- Drama series (such as Baantjer, ER)
- Action series (such as CSI,24/7)
- Comedy series
- Soaps
- Real life soaps, documentary soaps, reality programmes
- Documentaries, informative programmes
- Action films
- Romantic feature films
- Comedy films
- Erotic programmes
- Music programmes
- Nature programmes
- Travel programmes
- Other, namely....
- Don't know

K: Radio

<no return>

K1. Which of the radio stations below do you listen to regularly?

<Multiple response>, <randomize>

- Radio 1
- Radio 2
- 3FM (Radio 3)
- Radio 4
- Radio 5
- Sky Radio
- Radio 538
- 100% NL
- Radio Veronica
- Classic FM
- Arrow Classic Rock
- Arrow Jazz FM
- BNR News radio
- Slam!FM
- Q-Music
- A regional radio channel
- Other, namely.....
- Don't know

L: INTERNET

<no return>

L1. What do you use Internet for?

<randomize, multiple answers possible>

- E-mail
- Banking
- Job search
- House search
- Visiting sports sites
- Comparative sites
- News/current information
- Downloading Software
- Visiting news groups
- Chatting/ MSN
- Searching information about products or services
- Purchase/sale of products (for instance: Marktplaats)
- Downloading music/films/games
- Telephoning (Skype)
- Booking travel
- Reading online magazines/newspaper
- Listening to the radio
- Watching TV programmes (for instance on Uitzending gemist)
- Visiting/ reading we logs (for instance: Geen Stijl, blogspot)
- Visiting sites of friends (for instance: Hyves, MySpace)

- Viewing video films (such as on Youtube, ftv.nl)
- Visiting dating sites (for instance: Relatieplanet)
- Search engines (such as Google)
- Orientation holiday accommodations
- Orientation airplane tickets
- Booking holiday accommodations
- Booking airplane tickets
- Other, namely....
- Don't know

<no return>

L2. What travel websites do you visit regularly for information about travel? <separate coding: TOMA (first mentioned) & Totally Spontaneous>

-

<no return>

L3. Which of the following statements applies to you most?

- When I visit a travel website I do not have a clear idea of where I would like to travel to
- When I visit a travel website I know to which continent I would like to travel to
- When I visit a travel website I know to which country I would like to travel to
- When I visit a travel website I know exactly to which places /destination I would like to travel to

M:MAGAZINES

<no return>

M1: Which of the magazines below do you read regularly?

<randomize, multiple answers possible>

- RTV magazines or programme guides
- Management magazines (For instance: Management Team)
- News magazines (For instance: HP/ De Tijd)
- Women's magazines
- Men's magazines
- Children's magazines and magazines for young people
- Family magazines
- Special interest magazines (Magazines focussing on specific themes, such as National Geographic)
- Sponsored magazines (Such as Allerhande)
- Living, Gardening and DIY magazines
- Culinary magazines
- Child-raising magazines
- Travel and leisure magazines
- Sports magazines

- Other, namely...
- Do not read magazines
- Don't know

N: NEWSPAPERS

<no return>

N1: Which of the following newspapers do you read regularly?

<randomize, multiple answers possible>

- Algemeen Dagblad
- NRC Handelsblad
- Trouw
- NRC Next
- Parool
- Financieel dagblad
- De Volkskrant
- Telegraaf
- Spits
- Metro
- Pers
- A regional daily
- Dag
- Regional newspaper
- Other, namely...
- None

<no return>

<conditions:

- the respondent lives within post code area 1000-1299 or 2011-2239 and
- Young adults: household made up of one or more people all aged 18-35 without children (may include single member households) or
- Mature families: household made up of one or more people, all aged 50-74; no children living at home and
- Bij F1=ja gezegd

Q1. In conclusion, our final question: would you be interested in participating in a follow-up survey? This is a conversation at a location and you will receive compensation for this as well as for your travel expenses.

- Yes, I am interested and would like to be contacted
- No, I am not interested

Background details:

Match respondent details to background features: age, sex, education, region, size of house hold, social class, prosperity, employment, etc.

Thank you for participating!

<end of questionnaire>