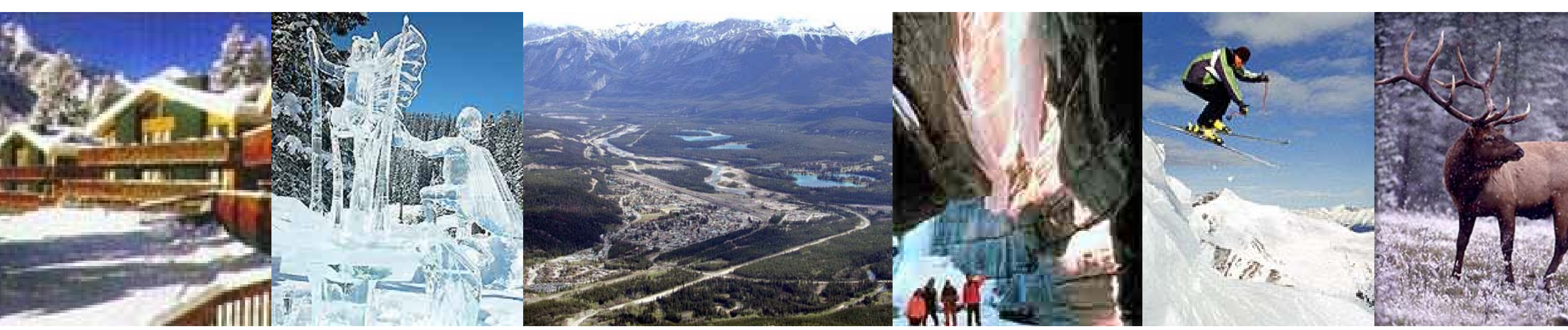
infact Research and Consulting Inc.

Market Potential for Regional Visitors to Jasper in the Fall, Winter and Spring Seasons

Alberta Tourism, Parks, Recreation and Culture

April 30, 2007



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INFORMATION ▪ PLANNING ▪ EVALUATION

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Introduction

Infact Research and Consulting Inc. is pleased to provide a report on the market potential for visitors to Jasper in the fall, winter and spring seasons. The information is intended to assist in marketing Jasper as a destination in key target areas of Alberta's regional market.

Background

Visitor statistics show that the number of visitors from the United States has been declining nationally, while the hoped for increase in business indicated by the level of early tour group bookings to Jasper was not realized in 2006. The summer season remained active, albeit at the same overall level as previous years, due to a stronger regional and Canadian market. More business in the eight month off-season, which accounts for less than half of all visitation to the region, would be desirable.

As the combined resources of the consortium involved in this project – Alberta Tourism, Parks, Recreation and Culture (ATPRC), Jasper Tourism and Commerce, Parks Canada, Ski Jasper and Travel Alberta In-Province – would not be sufficient to reverse the structural change that has been occurring, the organizations prefer to look to increasing visitation from the regional market in these seasons, capitalizing on the trend seen last summer and the economic wellbeing of the population.

Three important areas in Alberta were identified for targeting – the metropolitan areas of Edmonton, Calgary and Grande Prairie and, in Saskatchewan, Saskatoon. Furthermore, within each geographic area, three distinct household lifestage groups were identified as being of interest: Young Adults, Families and Mature/Seniors.

Purpose and objectives

To provide guidance and direction for marketing and product positioning in promoting Jasper National Park, the Jasper townsite and properties and activities in the area, the sponsors of this study wished to:

1. Investigate the potential for more visits by regional visitors to Jasper for each of the fall, winter and spring seasons.

2. Identify the key selling attributes or strengths of Jasper, for each of the three seasons.

3. Identify perceived or real constraints that may hinder people from visiting Jasper more often or visiting at all.

The objectives or research questions identified were to cover the following topics:

- Perceptions of Jasper
- Visit interest and intentions
- Access barriers, interest in air and train service
- Visit experiences
- Sources of information and competitive destinations

Methodology

TARGET MARKETS

Geographic markets and lifestage segments

The market to be covered by this research was defined geographically and by lifestage. Geographically, residents of the Edmonton CMA (Census Metropolitan Area), Calgary CMA, Grande Prairie CA (Census Agglomeration) and Saskatoon CMA were included in the survey.

The three lifestages were defined as follows:

- Young Adults: Households with all members aged 18-34, no children.
- Families: Households made up of 30-44 year old couples with at least one child under age 15.
- Mature/Seniors: Households with one or more members aged 55-74.

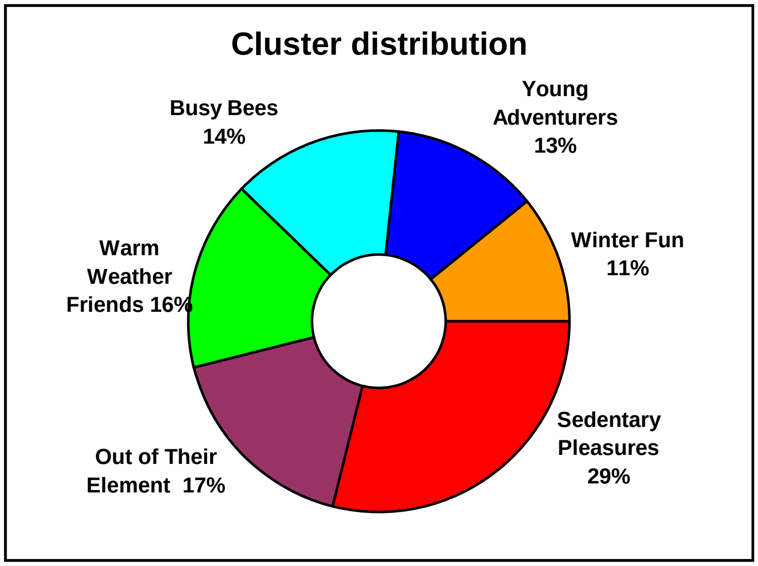
Approximately 365,000 households are included in these markets, based on Census 2001 data.

Attitude, Interest and Opinion Clusters

Based on the survey data, a further method of segmenting the regional market was derived, termed Attitude, Interest and Opinion (AIO) Clusters. Six different clusters that cut across the geographic markets were found and named according to their most distinctive characteristics. Although they also represent findings from the survey, they are described here to familiarize the reader with them and facilitate understanding of the report findings.

Using dichotomous data on reasons to visit Jasper, barriers to visiting, and activities and attractions of interest, a cluster analysis was run and solutions for 3 to 7 clusters examined. The 6 cluster solution provided the smallest number of distinct and useful categories describing common sets of interests and opinions. Further cross-tabulation of these clusters against other data collected in the survey showed distinct attitude and behaviour patterns were associated with them.

The size of each of the six clusters is shown in the graph alongside. The clusters were named to reflect their dominant characteristics. These will be explored in greater depth in the body of the report but are briefly summarized below. Also noted in the descriptions are distinctive demographic characteristics associated with each one, based on the information in the table below.



- Sedentary Pleasures: The largest cluster includes knowledgeable visitors who are predominantly Mature/Seniors. They are interested in low effort sightseeing activities and are attracted by historic features.
- Out of Their Element: The next most sizeable group has relatively unfavourable opinions of Jasper because such defining elements of the destination as scenery and wildlife are less important to them than the average person. Few activities and attractions are a draw, so this group has no reason to go, nor enough to do. They are less likely to be found in Grande Prairie, and are made up mainly of Mature/Seniors, with a preponderance of males.

Demographic profile of AIO Clusters

	Total	Sedentary Pleasures	Out of Their Element	Warm Weather Friends	Busy Bees	Young Adventurers	Winter Fun
Geographic market							
Calgary	25	25	30	24	25	21	22
Edmonton	25	27	25	28	27	18	22
Grande Prairie	25	20	16	29	27	37	33
Saskatoon	25	28	29	19	21	24	23
Lifestage segment							
Young Adults	27	11	20	27	32	62	34
Families	30	24	16	41	38	24	45
Mature/Seniors	43	65	64	32	30	15	21
Gender							
Male	50	43	64	53	35	65	47
Female	50	57	36	47	65	35	54
Household Income							
Average (000)	$68	$64	$67	$78	$59	$73	$74

- Warm Weather Friends: Members of this cluster tend to be higher income Families that want a camping and fishing holiday in the great wide outdoors. They are not interested in indoor or built attractions and are less satisfied than average with Jasper.
- Busy Bees: Interested in spring and mid-week travel, and to some degree, winter visits, they are currently the most satisfied group. Cluster members include fewer than average Mature/Seniors and more Families, an above average number of females and a lower household income. They have an energetic interest in anything and everything Jasper has to offer, are comfortable with active and passive nature-based activities and built attractions. They are also distinctive for their interest in educational opportunities and things for children to do.
- Young Adventurers: A small but vital group, Young Adventurers form the backbone of off-season visitors, especially in winter. Concentrated in the Young Adult lifestage, they are avid skiers/snowboarders and are also interested in all challenging (and death-defying) outdoor activities in all seasons. The majority are young men.
- Winter Fun: These are winter visitors who focus on skiing/snowboarding,, supplemented by other ice and snow activities, as well as après ski opportunities to relax and rejuvenate. The cluster is predominantly made up of younger people in the Families and Young Adults lifestages.

SURVEY METHOD

The research was undertaken in two phases. Phase I was exploratory and included a series of focus groups in each geographic market to identify a comprehensive range of perceptions that drive consumer action. They explored knowledge, experience, barriers, facilitators and motivators, attitudes, opinions and beliefs that exist in the regional market about Jasper in the off-season. They also examined reactions to posters and pictures to help identify elements within promotional imagery that could stimulate or inhibit attention and interest. A summary presentation of the findings was delivered in Jasper on March 9, 2007 and the ensuing discussion helped to guide development of the questionnaire for the quantitative survey that was conducted in Phase II.

The survey was administered online in the same four geographic markets. Three online panels were used to try to assemble a sample of sufficient size to permit online surveying in the smaller markets. They were: OpenVenue eResearch Solutions' Web Perspectives Canadian Consumer Panel, Global Market Insite and Greenfield Online. In addition, phone to web recruiting took place in Grande Prairie when it became evident that the online panels would fall well short of quota.

Online panels are representative of the online population. According to Statistics Canada, the online population constitutes a majority of the population. It includes 77% of adults in Calgary, 69% in Edmonton and 68% in "other urban areas" in Canada. 90% of users access the internet from home, with two-thirds doing so daily (*Canadian Internet Use Survey, 2005*). Quotas helped to ensure that the lifestage segments and genders were reasonably well represented in the sample.

SAMPLE SIZE AND DESCRIPTION

Three 1½ hour focus groups were conducted in each geographic market, one in each of the target lifestages. All participants had taken a discretionary pleasure trip lasting at least one night in the previous 18 months. In all, 100 people participated, an average of 8 per focus group. The focus groups were conducted in February 2007.

For the survey, a target of 800 completed interviews was established, 200 per geographic market. When it became evident that the Grande Prairie quota could not be achieved, it was reduced and more interviews were accepted from Calgary and Edmonton.

Within each market, an approximately equal balance of respondents by lifestage and gender was targeted, to ensure a sample base of sufficient size to examine each segment with some degree of confidence. However, the main objective was to generate the totals required for the smaller geographic markets. All participants had taken a discretionary pleasure trip lasting at least one night in the previous 36 months. [1]

The survey was conducted between March 23 and April 3, 2007, providing a total of 782 responses by the cut-off time. These were distributed as follows:

Calgary	250
Edmonton	256
Grande Prairie	77[2]
Saskatoon	200

Appendix I outlines the number of responses received in more detail.

The totals were weighted during data processing to restore equal importance to each of the geographic markets, resulting in a weighted base (wn) of 800, 200 per market. Results were also weighted to restore true population proportions by lifestage and gender within each geographic market, so that the findings would be representative. The weighted sample is also shown in Appendix I.

[1] Screening started at 18 months, but was relaxed to three years to allow more people to qualify. However, the change had minimal impact.

[2] 22 of the 77 Grande Prairie interviews were phone to web recruits; they were recruited from the telephone book and screened prior to being invited to participate in the survey online, thus ensuring that the questionnaire completion method was standard for all.

QUESTIONNAIRE AND DATA ANALYSIS

Following completion of the qualitative research, a draft question list was prepared and approved. The questionnaire underwent soft-testing before being launched. Final survey time averaged 11.5 minutes. The questionnaire is included as Appendix II.

It should be noted that a program malfunction occurred after launch which was found and corrected mid-way through the survey. Most respondents answered a follow-up question to correct the error, but about 50 did not. Their responses were not used for the question about skiing/snowboarding locations. No other questions were affected.

The survey was analyzed using SPSS, an advanced statistical analysis program. All questions were extensively cross-tabulated. The outputs from the SPSS analysis are shown in a separate volume of tables. Any differences to graphs or tables in this report are due to rounding of the numbers.

REPORT FORMAT

To meet the target questionnaire length, the section on information sources and competitive destinations (except for skiing) was deleted and only findings from the qualitative study are discussed in this report.

Another section which is addressed qualitatively, relates to perceptions of travel in general in the seasons under investigation. This provides a backdrop to understanding the Jasper results.

All results discussed in the report that differentiate between markets or other sub-groups of interest are based on statistically significant differences.

The findings from the survey are presented in this report and form its focus. They are supported with descriptions and insights from the focus groups, where these serve to enhance understanding of the quantitative results.

Findings

The three seasons

For the purposes of this study, the three seasons were defined as fall, from October 15 to November 30, winter, from December 1 to March 31 and spring, from April 1 to June 15. The discussions in the focus groups started with a question on travel associations for the time period October 15 to June 15 and each of the defined seasons.

Several key themes emerged which should be considered as a backdrop against which travel to Jasper is considered by the population. Associations with this period encompassed:

- A desire to travel (and actual travel) to warmer southern climates in the US and Central America in particular. The survey's winter period was the most desirable for this, breaking up the long, cold, Canadian winter and being post-hurricane season at the preferred destinations.
- A common constraint to travel in the off-season was the fact that children are in school and so is anyone employed in the education system.
- In Canada this was seen as low season – a good time for deals, discounts, seat sales and coupons, combined with off-season rates. Being off-season, it was expected to be quieter, with less traffic.
- On the other hand, the timeline encompassed a number of high season periods when there is more traffic and it can be expensive. These were mainly school holidays such as the Christmas break, spring break and Easter long weekend. At the warm weather destinations it is peak season, with the winter period here being the most expensive there.

In the individual seasons, October 15 – November 30 was dubbed fall, late fall, early winter or winter in various focus groups. The weather is variable, it is after the leaves change colour in September and there can be a lot of snow. During this period the focus for most people appeared to be on planning for Christmas or planning a tropical winter vacation and they simply don't think about travelling in these months.

It was suggested that the December 1 – March 31 period was in fact two periods: Christmas in December and winter from January to March. Christmas means visiting with family during the holiday season and preparing for it before that. People prefer to stay home for Christmas or experience family pressure to do so. Some do celebrate with their families on a trip, but this is seen as the high season travel period.

There were two schools of thought regarding the remainder of the winter period. Most just wish it would end and do not see it as a time to travel at all, or they view it as a time to go to warmer climates. Habit influences perceptions of travel as being something to do in summer, while winter is for work, and winter driving conditions can be a disincentive. Others "love" the winter as it offers snow and skiing, snowboarding and tobogganing, ice fishing and skidooing opportunities, along with hockey and visiting friends and relatives.

The April 1- June 15 period was variously named spring, Easter, spring break and “winter lite” by focus group participants, depending on their interests and perceptions. The period was viewed as far more favourable for travel as the weather is "good" (one no longer needs to wear long johns or stay indoors). Since the days are long, one can see and avoid animals on the road, golf getaways come to mind, as does hiking, animal watching and seeing spring start through changes in the vegetation. For people without children, it has appeal as a quiet period.

A four or five season definition similar to the one proposed by travellers (perhaps also distinguishing spring skiing in March/April), was considered for use in the survey, but ultimately rejected because of questionnaire length constraints.

Introduction to the survey

Once respondents had been successfully screened to ensure that they met the geographic and lifestage criteria for participating in the survey, a page appeared which introduced the remainder of the survey as dealing with Jasper National Park and the Jasper townsite as follows:

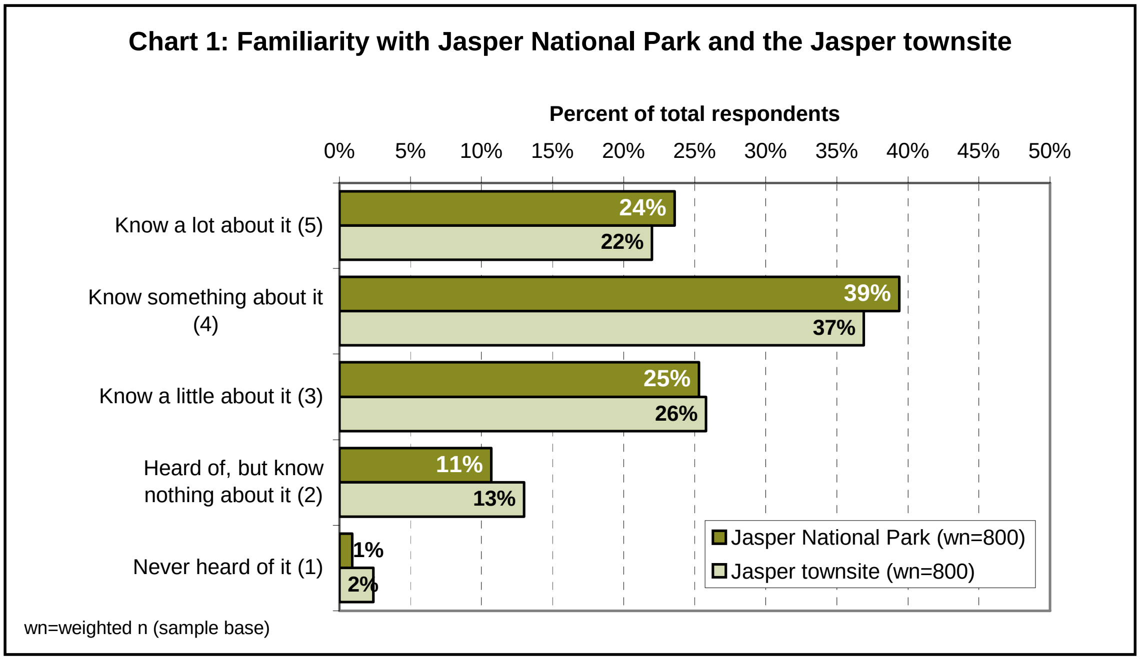
> *This survey is about Jasper National Park and the Jasper townsite as places to visit on a pleasure trip, where you are away from home for at least one night, between mid-October and mid-June. The first few questions ask about them separately, the rest combine them under the term "Jasper".*

Level of familiarity with Jasper National Park and the Jasper townsite in the off-season

THERE WAS HIGH AWARENESS AND FAMILIARITY

Respondents were asked: *How familiar are you with each area as a pleasure travel destination between October 15 and June 15,* and offered five options to choose from. The results are shown in Chart 1.

Overall familiarity in the off-season was similar in both (average 3.74 out of 5 for Jasper National Park and 3.63 for the Jasper townsite), with the largest number of people feeling that they "knew something about it". Relatively few had only heard of them without knowing anything about them. However, it is evident from these results that there is slightly greater awareness of, and familiarity with, Jasper National Park than the Jasper townsite.



There were a number of people who had never heard of the destination, with the rate being double for the Jasper townsite than Jasper National Park. This lack of awareness existed in all markets, but was especially prevalent in Saskatoon (5% for the townsite, 2% for the Park) and among Young Adults (4% for the townsite, 2% for the Park), most of whom lived in Saskatoon or Calgary. In the focus groups, we met representatives of both groups, but especially people who, despite having driven through Jasper National Park on the Yellowhead Highway, were not aware of the existence of the townsite. For them, the Park was simply a place they passed through on their long road to destinations in British Columbia (BC), combined with a reluctance to pay National Park fees should they stop over.

Familiarity was primarily linked to use and income

People who had **visited** Jasper in the past five years during fall, winter or spring, or who had skied at Marmot Basin, were more familiar with both Jasper National Park and the Jasper townsite. Those who had never visited in the off-season were understandably less familiar, with many responding that they had only heard of them and knew nothing about them.

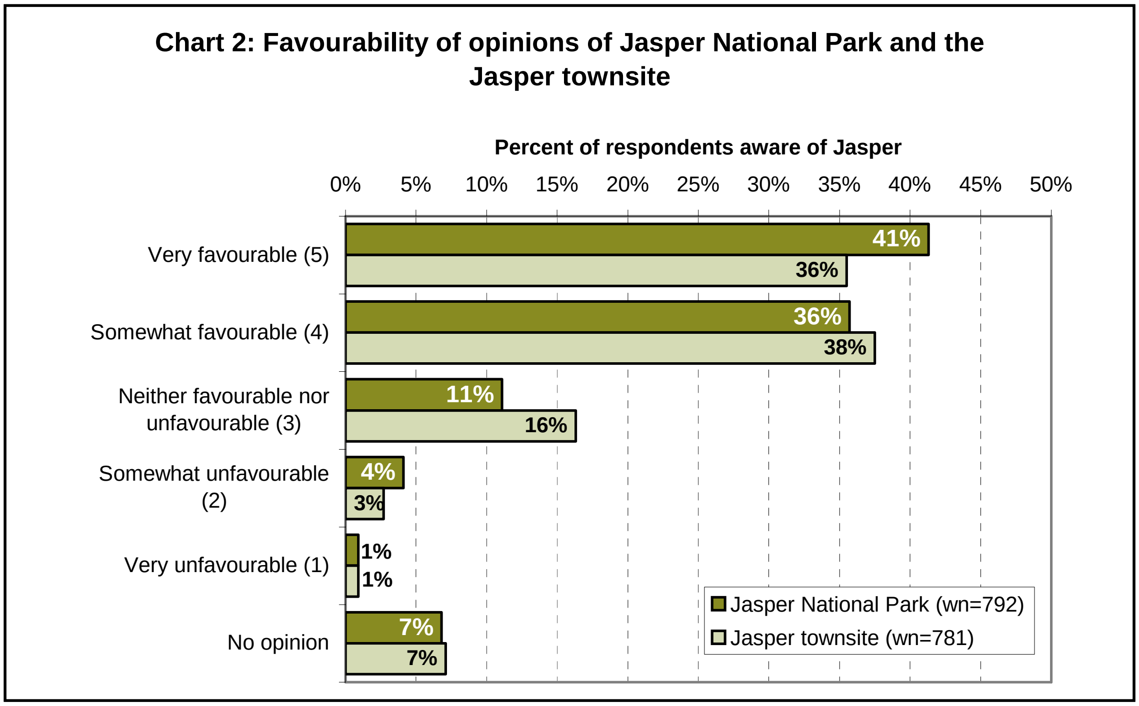
Geographic location played an important role in influencing familiarity. Grande Prairie and Edmonton residents expressed above average levels of familiarity with both locations, while Calgary and Saskatoon residents were significantly less familiar with them. Young Adults knew less about them than the other **lifestages**.

In addition, people in higher **income** households (over $80,000) were more familiar with the Jasper townsite than the average respondent.

Overall opinions of Jasper National Park and the Jasper townsite in the off-season

Overall opinions were very positive

Those respondents who had heard of Jasper National Park and the Jasper townsite were asked for their overall opinion of the sites in the off-season as follows: *What is your opinion of each area as a pleasure travel destination between October 15 and June 15.* Six options were presented for selection, as shown in Chart 2.



The results show high levels of favourability for both, with fewer than 5% holding negative views. 77% were positive about Jasper National Park and 73% about the Jasper townsite (average score 4.21 and 4.12 out of 5, respectively). What is particularly striking is the large proportion of people who provided the highest rating, especially for Jasper National Park (41% and 36%).

FAVOURABILITY WAS PRIMARILY LINKED TO KNOWLEDGE, USE AND INTERESTS

There was a direct correlation between the **degree of familiarity** with Jasper National Park and the townsite and the opinion expressed about them. The more people knew, the more favourable their opinions were likely to be. It was only among those that had simply heard of each location, but knew nothing about it, that the majority of responses were either neutral or no opinion was expressed. For all other levels of knowledge, opinions were predominantly positive, though the degree of favourability decreased with each descending level of knowledge. This is depicted in Charts 3a and b.

As a result, it is not surprising that people who had **visited** Jasper recently (i.e., in the past five years) during fall, winter or spring, or who had skied at Marmot Basin, had a more favourable opinion overall of both Jasper National Park and the Jasper townsite. About one in five of those who had never visited Jasper in the off-season had no opinion (the rest presumably provided impressions based on reputation and/or their experiences as summer visitors).

Grande Prairie residents were more favourable in their impressions than the other **geographic markets**, followed by Edmonton. Calgary and Saskatoon residents were significantly less favourable … and much more likely to have no opinion (about one in ten).

AIO Cluster differences were found too. Young Adventurers and Busy Bees were significantly more favourable than average in their opinions, while those belonging to the Out of Their Element group were less so. In fact, this cluster provided the lowest scores of any target group, with more than one in ten offering negative ratings.

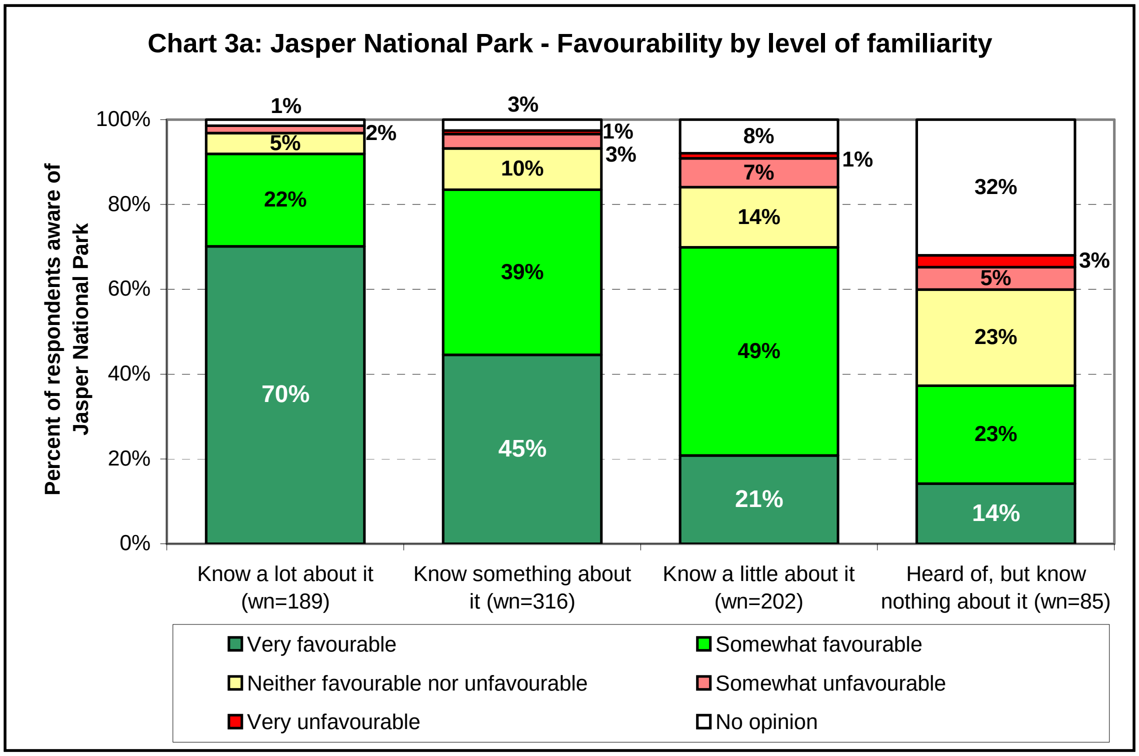


Chart 3a: Jasper National Park - Favourability by level of familiarity
Percent of respondents aware of Jasper National Park
100%
80%
60%
40%
20%
0%
1%
5%
2%
22%
70%
3%
1%
3%
10%
39%
45%
8%
1%
7%
14%
49%
21%
32%
3%
5%
23%
23%
14%
Know a lot about it (wn=189)
Know something about it (wn=316)
Know a little about it (wn=202)
Heard of, but know nothing about it (wn=85)
Very favourable
Somewhat favourable
Neither favourable nor unfavourable
Somewhat unfavourable
Very unfavourable
No opinion

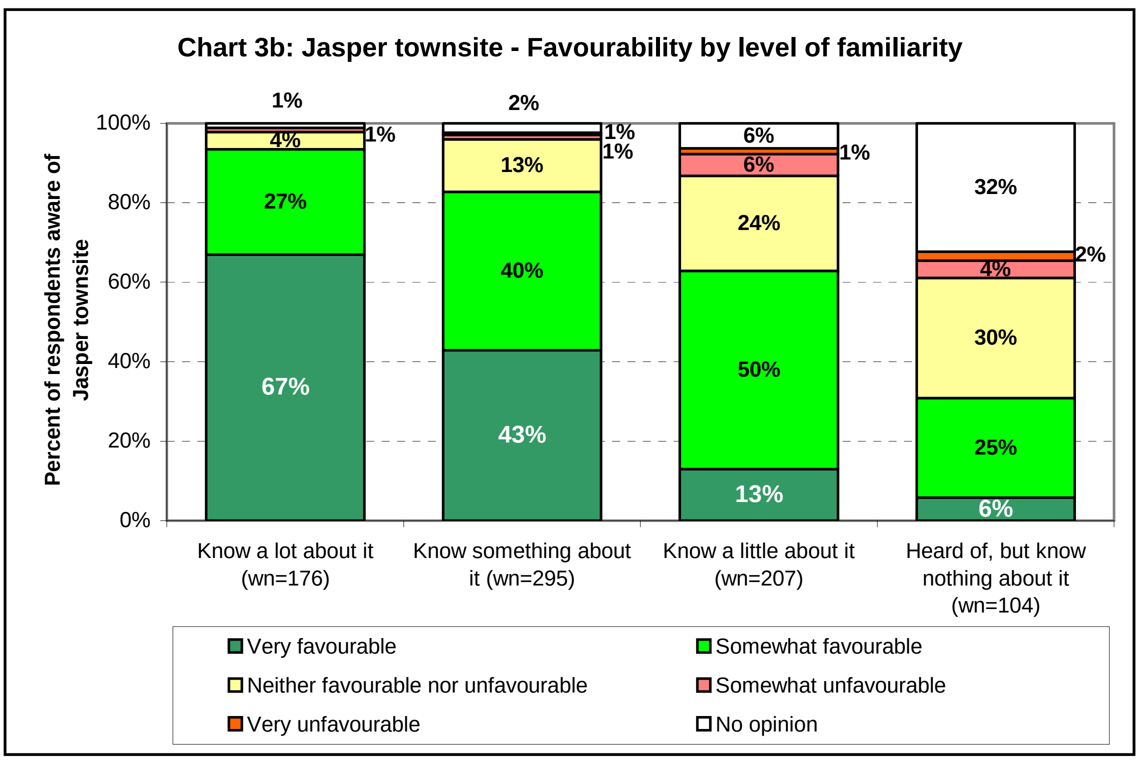


Chart 3b: Jasper townsite - Favourability by level of familiarity
Percent of respondents aware of Jasper townsite
100%
80%
60%
40%
20%
0%
1%
1%
4%
27%
67%
2%
1%
1%
13%
40%
43%
6%
1%
6%
24%
50%
13%
32%
2%
4%
30%
25%
6%
Know a lot about it (wn=176)
Know something about it (wn=295)
Know a little about it (wn=207)
Heard of, but know nothing about it (wn=104)
Very favourable
Somewhat favourable
Neither favourable nor unfavourable
Somewhat unfavourable
Very unfavourable
No opinion

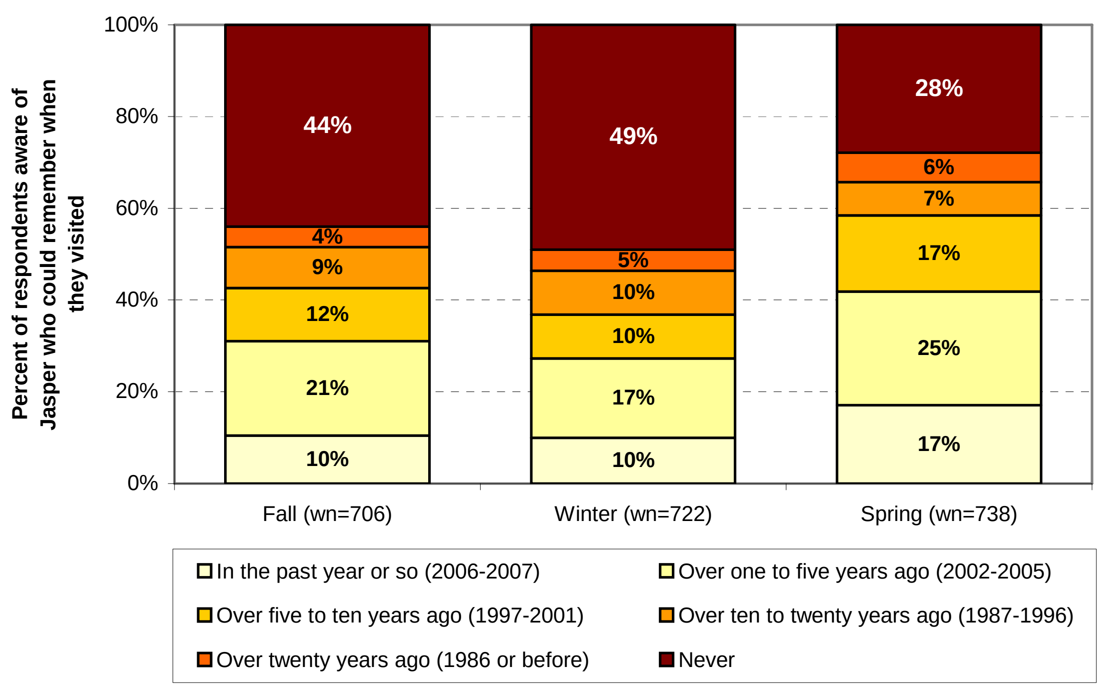
Visits to Jasper in the fall, winter and spring

Spring is the most popular off-season period, winter the least

Given the likely importance of having had the experience of visiting Jasper in the off-season in contributing to positive views of the area as a destination in that period, it is important to understand past use.[3]

Respondents were asked, *When last did you visit Jasper (National Park and/or townsite) for pleasure in the following three time periods: Fall: October 15 – November 30; Winter: December 1 – March 31; Spring: April 1 – June 15.* Their responses are shown in Chart 5.

Chart 5: When last visited Jasper for pleasure in the fall, winter and spring



Overall, 83% of respondents aware of Jasper and able to remember their last visit had been there in the off-season. The proportion for each of the defined seasons individually, however, was much lower – 56% in the fall, 51% in winter and 72% in the spring, the most popular period.

[3] As the direction of the relationship is not known, an alternative interpretation is that people with unfavourable views are less likely to return and hence their experience will be from longer ago, so they will know less about the destination.

The most recent visitors (within the past year) had also favoured spring over fall and winter, and this was true too for a five year period. The four winter months are clearly the greatest challenge, with the fall period of mid-October to the end of November being almost as difficult.

It is also of interest that more than one in ten had not been to Jasper in each season for more than 10 years.

GEOGRAPHY, LIFESTAGE AND INTERESTS INFLUENCE RECENCY OF VISITATION

In the **geographic target markets**, over 90% of residents of Edmonton and Grande Prairie (92% and 93% respectively) had visited at all in the off-season, compared to 76% of Calgarians and 70% of those from Saskatoon. The same pattern was found for each season individually.

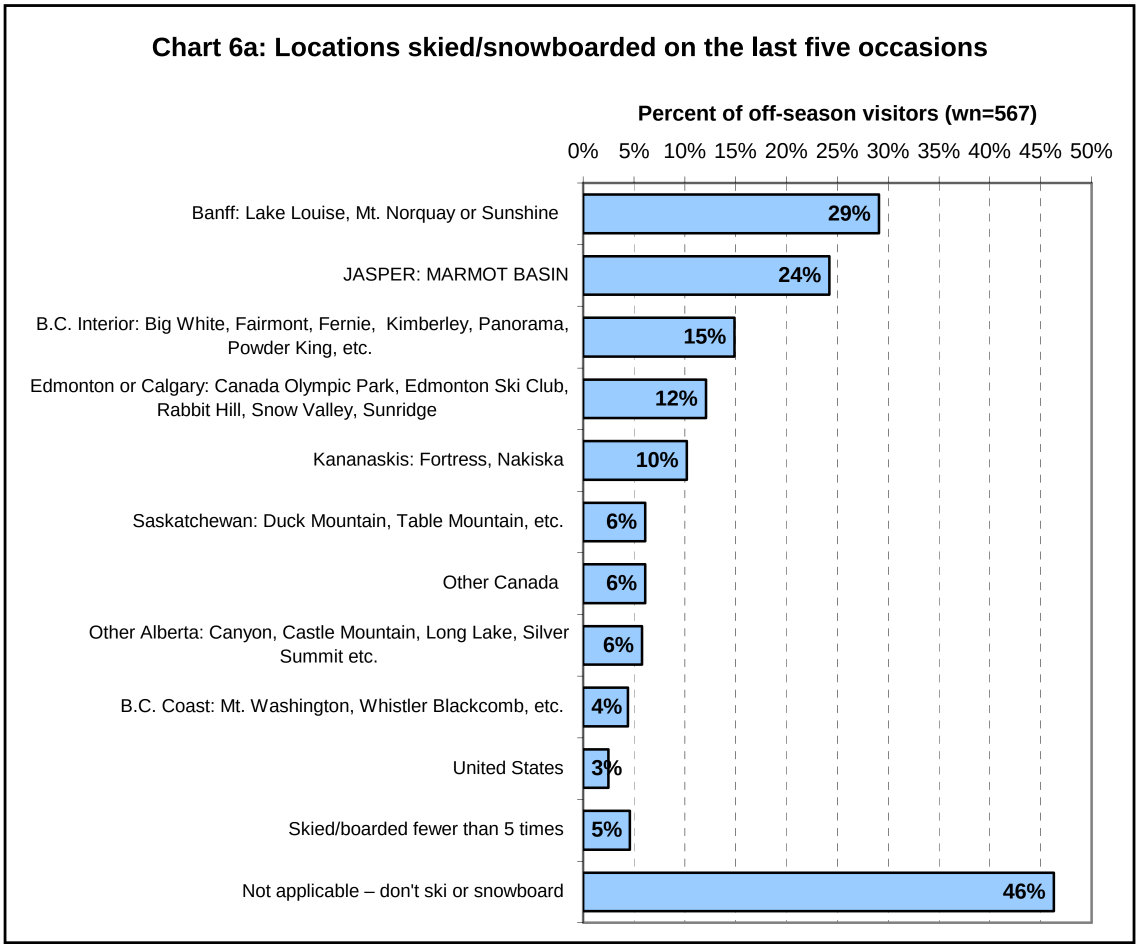
Additionally, Saskatoon and Calgary visitors had last visited longer ago (on average 9-12 years, vs. 3-7 years for Edmonton and Grande Prairie). These results were consistent with observations made during the focus groups that Saskatoon and Calgary residents appeared to have relatively little experience with Jasper in the off-season and that when they did, the visit was likely to have occurred quite some time ago.

In the **lifestage segments**, Young Adults had visited more recently than Families and the Mature/Seniors group in all three seasons. This was also true for people who had skied or snowboarded at Marmot Basin.

Among the **AIO Clusters**, Young Adventurers proved to be more recent winter (especially) and spring visitors than any other group, with almost half having been to Jasper in the past 5 years in those seasons.

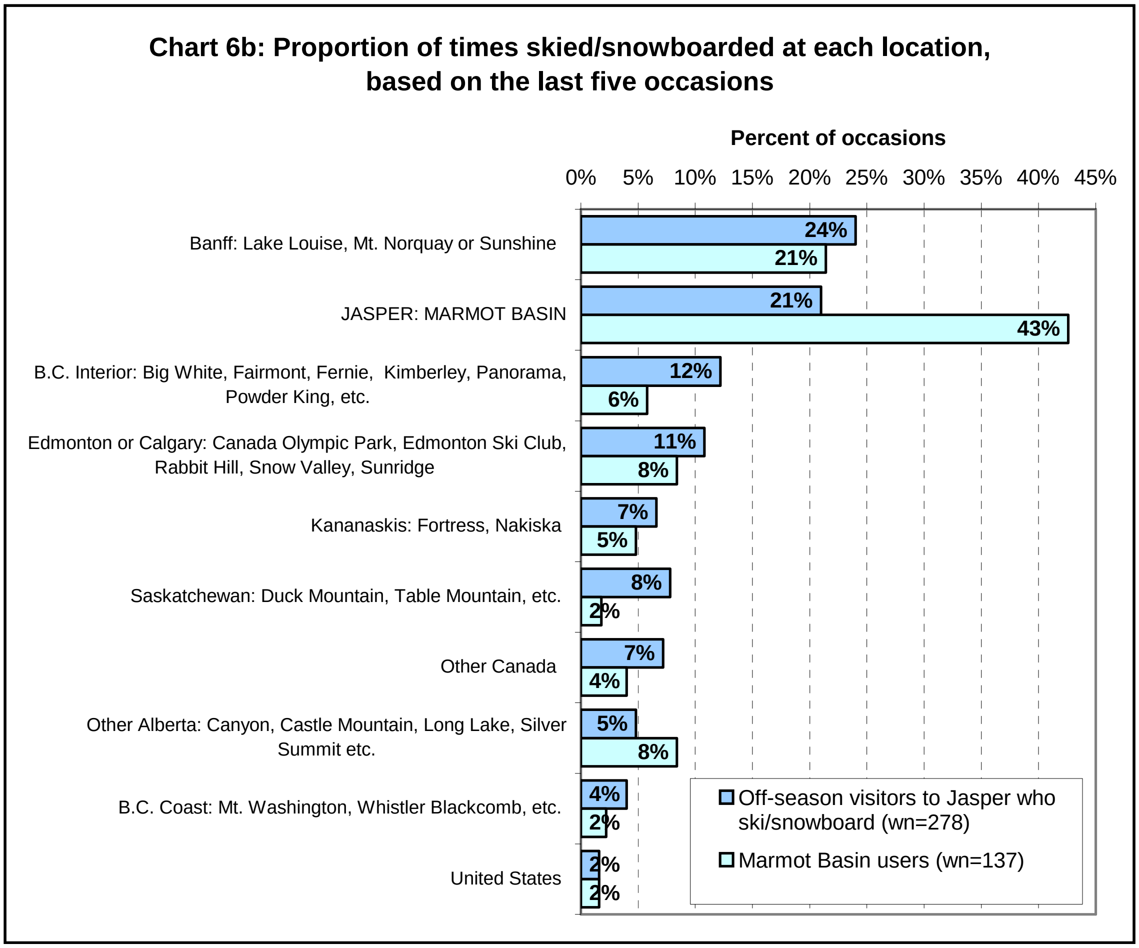
MARMOT BASIN IS A PARTICULARLY IMPORTANT ATTRACTION IN WINTER, WITH GEOGRAPHIC MARKET BEING A PRIMARY DETERMINANT OF USE

As downhill skiing was identified during the focus groups as the most pervasive activity-related association with Jasper in the off-season, a question was asked to examine attraction and retention of skiers/snowboarders to Marmot Basin. Respondents who had visited Jasper in the off-season were asked, *Where have you gone on the last five occasions that you did downhill skiing or snowboarding?* If hills in a region were mentioned at least once, they are counted in the percentages shown in Chart 6a. Chart 6b shows the proportion of times (based on the 5 most recent occasions) that each area was skied by all visitors to Jasper, and by those who skied/snowboarded at Marmot Basin at least once in the last five outings.



The results show that, among past off-season visitors to Jasper:

- Just over half were non-skiers/snowboarders or had not skied 5 times. Two-thirds of people who had never visited Jasper in winter were not skiers or snowboarders, confirming the importance of the sport in influencing perceptions of Jasper in this season. In comparison, 71% of winter visitors in the past 5 years were skiers/boarders, while more than half of them (44%) had been to Marmot Basin.
- Among those who were skiers/snowboarders, slightly more had been to the three Banff ski areas than to Marmot Basin in Jasper. Banff ski areas made up almost a quarter of all ski visit destinations.
- One-quarter had skied/snowboarded in Jasper, making over one-fifth of all ski visits to Marmot Basin.



- Among Marmot Basin users, the largest number of trips was to this hill (two in five). While Banff gave the strongest competition, accounting for one in five ski trips, competition was experienced from many other hills in Alberta, including local and regional ski areas.

A separate analysis shoed that most skiers/boarders at Marmot Basin were also users of Banff's ski areas (66%). Many went to BC Interior destinations (26%), used local hills in Edmonton and Calgary (24%) and Kananaskis (18%), as well as other Alberta areas (15%).

Ski/snowboard destinations were heavily influenced by **geographic location**, even among those who had visited Jasper in the off-season:

- Grande Prairie residents were the most likely of all to use Marmot Basin (36%) and were its most intensive users, taking two out of five trips there (40%). Competition came mainly from Banff (17% of visits), the BC Interior (13%), Other Alberta destinations (13%) and Other Canadian resorts (16%).

- Edmontonians were almost as likely to ski Marmot Basin (33%), taking 27% of their trips there. Major competition came from Banff which accounted for almost as many visits (24%). Other key destinations were local Edmonton facilities (20%) and BC Interior (13%).
- 10% of Calgary residents had skied in Jasper on one of their 5 most recent trips, accounting for 6% of all visits. Banff ski areas were the largest draw (40% of trips), followed by Kananaskis (15%), local Calgary hills (13%) and BC Interior resorts (10%).
- 14% of Saskatoon residents had been to Jasper on one of their 5 most recent ski/snowboarding trips, accounting for 7% of these trips. Their most popular destinations were hills in Saskatchewan (39% of trips) and Banff (18%), followed by BC Interior (13%) and BC Coast (12%).
- Skiers/snowboarders who had not been to Marmot Basin on any of the past 5 occasions were predominantly from Calgary and Saskatoon.

Other findings that are of interest were that:

- Looking at the **lifestage segments**, three-quarters of Young Adults were skiers and/or snowboarders (75%), a higher proportion than Families (61%). The Mature/Seniors segment was least likely of all to ski at 38%.

  However, among those who had skied/snowboarded 5 times, Jasper was a destination on at least one of the trips more often in the Mature/Seniors lifestage (56%) and among Families (50%) than among Young Adults (40%). Young Adults used a greater variety of ski hills, with 14% of trips being made to Jasper, compared to 23% among Families and 26% among Mature/Seniors, suggesting greater loyalty in the older groups. This may account for the image of Marmot Basin in the focus groups as having something for all levels and being more for families, rather than younger crowds.
- The proportion of skiers/boarders increased with increasing **household income**, being highest in the high income group (58% over $80,000) and lowest at the lower income level (45% up to $50,000). The average household income of Marmot Basin users was $82,000, significantly higher than that of people who only used other ski areas or non-skiers/boarders.

  Higher income people were also more likely to ski Jasper at all (37% vs. 10% of the lower income group). The proportion of trips taken to Marmot Basin followed the same pattern, with 29% of ski trips in the high income group being taken to Jasper vs. 8% in the lower income group. Similar income influences were not found for any other destination region. The reason for the bias among higher income households toward Jasper for skiing was not evident either from the survey or the focus groups, though cost may play a role.
- **Knowledge and opinions of Jasper** influenced use, with people who knew little or nothing about Jasper National Park and the Jasper townsite, or who had a neutral or negative opinion of them, being significantly less likely than average to be Marmot Basin users (4% to 12%). They were also less frequent users of the hill (5% to 10% of trips). In contrast, those who "knew a lot" about the area were especially likely to be more frequent Marmot Basin users, making 32% to 35% of their ski/boarding trips there.

- Based on the above, it should not be surprising that there were distinct **AIO cluster** differences too. At the one end of the scale, two-thirds of those looking for Sedentary Pleasures were non-skiers/boarders; at the other, 85% of the Winter Fun group and 84% of the Young Adventurers were participants. However, there was little difference between skiers in each cluster in their use of, and preference for, Marmot Basin … and it appeared that both the Winter Fun and Young Adventurer groups were likely to use a greater variety of hills (especially in Banff and the BC Interior) than the other clusters.

Interest in visiting Jasper in the off-season

THE POTENTIAL TO VISIT JASPER IN THE FALL, WINTER AND SPRING IS GREATER THAN SUGGESTED BY PAST TRAVEL

Respondents who were aware of Jasper were asked to rate the chances that they would visit in each of the three seasons. A slightly modified 11-point Juster Probabilistic Scale was used to measure answers to the question, *What are the chances that you will visit Jasper in the next couple of years in these three time periods: Fall: October 15 – November 30; Winter: December 1 – March 31; Spring: April 1 – June 15*. The Juster Scale is based on probability theory and its mean has been demonstrated to provide a fairly accurate estimate of future behaviour.

This set of questions was asked after respondents had the opportunity to review questions relating to motivators and barriers to visiting Jasper in the off-season and questions relating to activities and attractions they might be interested in. This positioning ensured that respondents were answering from a position of knowledge of what is available at the destination and the result would therefore represent an estimate of maximum potential.

The average chance of visiting in the fall was rated at 2.57 out of 10, suggesting that 26% would be interested in visiting Jasper in this season. The figure for winter was 2.59 (also 26%) and for spring, 4.54, or 45%. The pattern of greater interest in visiting in the spring that was identified from past visits therefore continued. However, the proportion of potential visitors "in the next couple of years" was roughly similar to the proportion who had visited over the past 5 years (31% in the fall, 27% in winter, 42% in the spring), suggesting that potential for growth does exist.

The profile of respondents who were more or less likely than average to visit in each season in the near future is shown in Table 1.

Table 1: Groups with a higher or lower than average potential to visit Jasper in each season

	Higher Potential			Lower Potential		
(Average)	Fall (26%)	Winter (26%)	Spring (45%)	Fall (26%)	Winter (26%)	Spring (45%)
Region			▪ Grande Prairie 59%	▪ Saskatoon 17%	▪ Saskatoon 19%	▪ Saskatoon 33% ▪ Calgary 38%
Lifestage		▪ Young Adults 34%			▪ Mature/Seniors 20%	
Household Income					▪ Lower 21%	
AIO Cluster	▪ Young Adventurers 33%	▪ Young Adventurers 47% ▪ Winter Fun 37% ▪ Busy Bees 33%	▪ Busy Bees 56%	▪ Out of Their Element 15% ▪ Warm Weather Friends 19%	▪ Out of Their Element 16% ▪ Warm Weather Friends 16% ▪ Sedentary Pleasures 20%	▪ Out of Their Element 33%
Last Visit	▪ In fall in past 5 years 42%	▪ In winter in past 5 years 53%	▪ In spring in past 5 years 60%	▪ Never in fall 14%	▪ Never in winter 14%	▪ Never in spring 32%
Ski area use	▪ Marmot Basin 35%	▪ Marmot Basin 47%	▪ Marmot Basin 55%			
Familiarity (Know ...)	▪ A lot about JNP 39% ▪ A lot about the townsite 40%	▪ A lot about JNP 38% ▪ A lot about the townsite 39%	▪ A lot about JNP 62% ▪ A lot about the townsite 65%	▪ Little/nothing about JNP 19% ▪ Little/nothing about townsite 19%	▪ Little/nothing about JNP 18% ▪ Little/nothing about townsite 18%	▪ Little/nothing about Jasper National Park 35% ▪ Little/nothing about townsite 35%
Favourability	▪ Very favourable JNP 40% ▪ Very favourable townsite 35%	▪ Very favourable JNP 35% ▪ Very favourable townsite 36%	▪ Very favourable JNP 57% ▪ Very favourable townsite 60%	▪ Neutral/ unfavourable JNP 15% ▪ Neutral/ unfavourable townsite 17%	▪ Neutral/ unfavourable JNP 13% ▪ Neutral/ unfavourable townsite 14%	▪ Neutral/ unfavourable JNP 33% ▪ Neutral/ unfavourable townsite 35%

These results show:

- That the level of **familiarity** with Jasper, and **favourability** of opinions toward it, influence future visitor behaviour in all seasons.
- That past **experience** does have an influence on the likelihood of future visits in all seasons.
- That Saskatoon residents are less likely to go to Jasper than residents of any of the Alberta **geographic markets**, in all seasons.
- That lower **income** negatively influences the chance of a winter trip. Based on focus group discussions, this may be because such households prefer to save for a warm weather holiday in the summer.

INTEREST IN MID-WEEK TRAVEL DEPENDS MAINLY ON INTEREST IN THE DESTINATION

Improving mid-week visitation levels is a challenge that continues to face Jasper operators. After being asked about their potential to visit Jasper in the three seasons, respondents were asked about their potential to visit on weekdays rather than weekends. The way in which the question was phrased differed by lifestage, as it had become evident from the focus groups that taking children out of school was a perceived barrier for some families, while school and work commitments (especially among teachers) could be a barrier in the other segments. Families were asked: *What are the chances that you would take your children out of school to visit Jasper on a mid-week trip (lasting 2 or more days between Monday and Friday), between October 15 and June 15*. Young Adults and the Mature/Seniors segment were asked, *What are the chances that you would take a mid-week trip (lasting 2 or more days between Monday and Friday) to Jasper between October 15 and June 15.*

The Juster Scale was again used. The average chance of making mid-week visits to Jasper in the off-season was 2.91 out of 10, for a predicted maximum potential market of 29%. Among the **lifestages**, Families came in at 25%, Young Adults at 27% and Mature/Seniors at 33%. The results are interesting for their relative similarity across segments, since some of the Mature/Seniors group (aged 55-74, by definition) would have been retired and presumably free to travel at any time.

The qualitative enquiry sheds some light on the matter. Parents of younger children (primary school age) tended to believe that it depended on the child's abilities whether s/he could be taken out of school or not. Teacher cooperation was also important in providing school work to keep up. Home schooled children had the greatest flexibility, as learning tasks may be prepared around the trip as part of their curriculum (e.g., maps/geography, history of the area, how other people live, vegetation/animals, etc.). Parents were more likely to take additional days around a weekend than a purely mid-week trip. Those who had taken their children out of school to go on vacation tended to have done so for a longer period to an international destination or for family gatherings.

In the Mature/Seniors lifestage, some travel appears to involve consideration of other people's schedules. For example, trips are often taken with their children and grandchildren and follow their needs. Some seniors are interested in organized group travel and follow the tour schedule.

To a degree, the general consciousness and perceived attractiveness of the destination also influences interest in mid-week travel. Calgary and Saskatoon residents were less interested in mid-week visits than Grande Prairie and Edmonton residents. Perhaps they do not see it as "worthwhile" to take off school and work to go to Jasper. This is especially interesting because many Edmonton focus group members could not see themselves taking vacation days to go to Jasper, when it is easily accessible for a weekend and viewed as a weekend destination. For instance, Jasper was not seen by Edmontonians as really getting away on vacation in the same way as flying to the Caribbean might be.

Cluster differences showed above average interest in mid-week travel among Families that were Busy Bees (39%) and below average interest among Families that were Warm Weather Friends

(11%) or Out of Their Element (13%). No similar differences by cluster were found for Young Adults and Mature/Seniors.

The critical importance of attitude to the destination is underlined when looking at mid-week travel potential by **level of interest in visiting, past visits, knowledge and overall opinions**. Higher potential to visit, more recent past visits, high knowledge and very favourable opinions were all associated with mid-week potential at rates similar to, or above that of the highest demographic group/cluster (Family Busy Bees at 39%). Table 2 shows these results.

Table 2: Highest potential for mid-week travel by influencing characteristics and lifestage

	Total %	Families %	Young Adults %	Mature/ Seniors %
Higher Potential Visitors				
Fall	49	43	42	58
Winter	46	40	39	60
Spring	41	35	37	50
Any off-season	41	34	35	50
Recent Past Visitors				
Fall	41	36	33	49
Winter	43	38	36	53
Spring	36	31	32	42
Marmot Basin	37	31	32	45
Know a Lot				
Jasper National Park	44	39	43	48
Jasper townsite	46	39	43	50
Very Favourable Opinions				
Jasper National Park	38	32	37	43
Jasper townsite	41	33	41	46
Average for all respondents	**29**	**25**	**27**	**33**

From these figures it may be seen that the likelihood of mid-week travel was higher among Mature/Seniors with favourable impressions and experience than among similar Young Adults and Families.

Among people with a high interest in mid-week travel, 41% are likely to visit in the fall, 40% in winter and 65% in the spring.

Reasons to visit Jasper

DISTINGUISHING CHARACTERISTICS OF JASPER WERE SCENERY, TRANQUILITY AND WILDLIFE

Respondents were presented with a list of 17 attractors to Jasper in the off-season. These were identified from positive associations generated in the focus groups for the three seasons under investigation. They were asked to choose five of the items from the list, in order of importance, as follows: *What would be the most important reasons for you to visit Jasper between October 15 and June 15. Please number the top 5 in order from 1 (most important) to 5 (5th most important)*.

Chart 7 shows what percentage of the population chose each item as one of the top five reasons to visit.

It is evident from these results that the defining characteristics of Jasper are wrapped up in its identity as a place to experience natural scenic beauty and a place to escape the rigours of urban life and relax in a calm, peaceful environment.

At a secondary level, the next most important characteristic was rooted in the region's identity as a National Park, with its mandate to preserve nature – in this case providing the opportunity to view wildlife in its natural setting. The natural theme continued at the tertiary level with choice of such items as the rugged outdoors feel which is sometimes seen to distinguish Jasper from its neighbouring National Parks, and the sight of nature awakening in the spring.

The Jasper townsite was selected as a reason to visit at the tertiary level, through attraction to its quaintness and sense of preservation, history and authenticity. Part of the attraction is due to the particular mix of shopping opportunities offered, something that will be discussed in greater detail in a later section. Other townsite associations, such as safety, festivals and events, and the people of Jasper, were chosen only infrequently as reasons to visit.

The only other activity of importance (besides wildlife viewing and resting and relaxing) was skiing/ snowboarding – also at the tertiary level. Less frequent agreement was found for the idea that, *there are lots of activities that interest me*, or, to *see the leaves when they change colour in the fall*.[4]

Also at a tertiary level were such incentives for visiting as a lack of crowding and affordability – both items which are strongly associated with any off-season travel.

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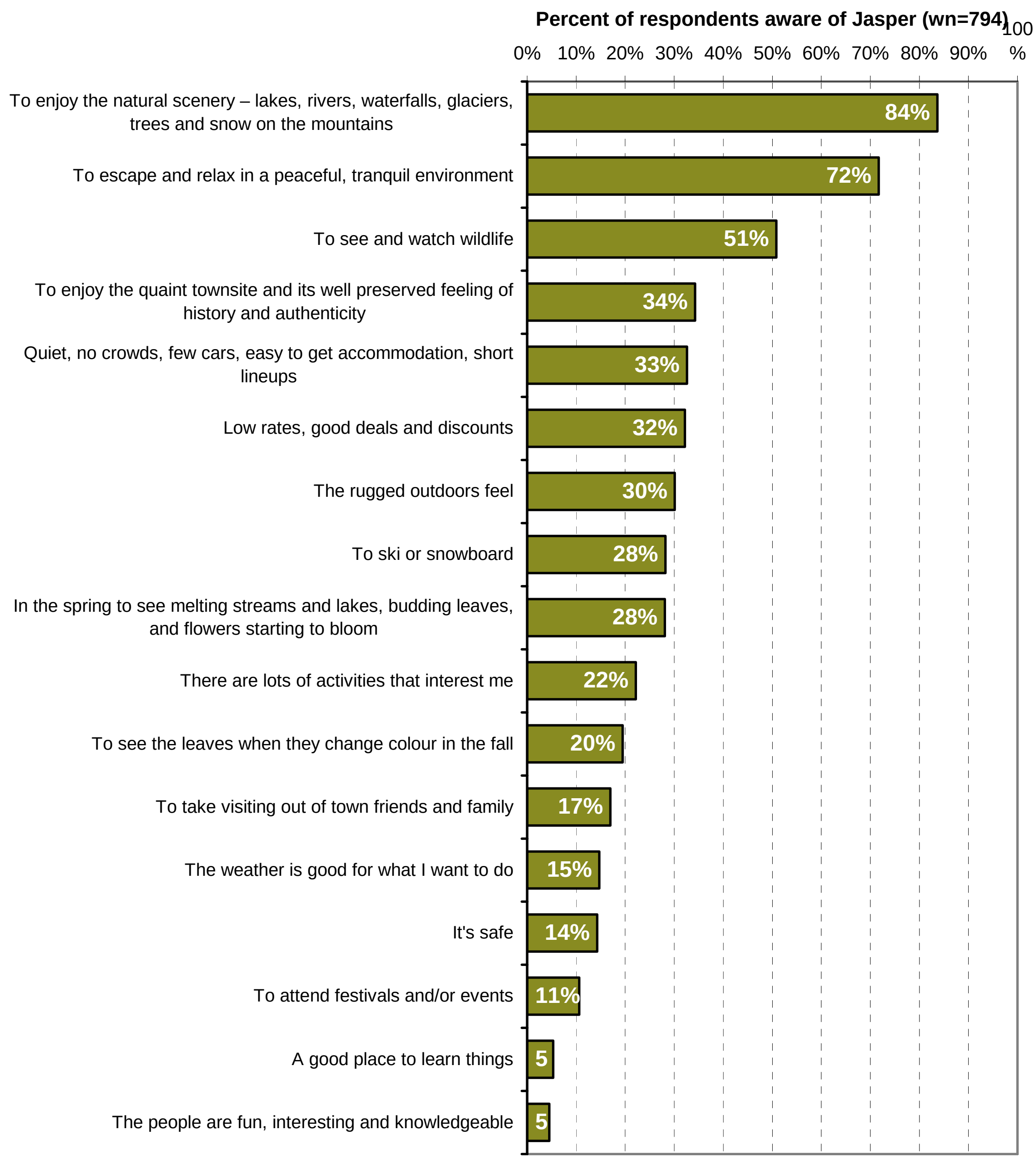
[4] In the focus groups, fall colours appeared to be associated primarily with Central and Eastern Canada, particularly for the reds of the maple trees. A poster of Jasper in the fall shown at the time aroused relatively little interest.

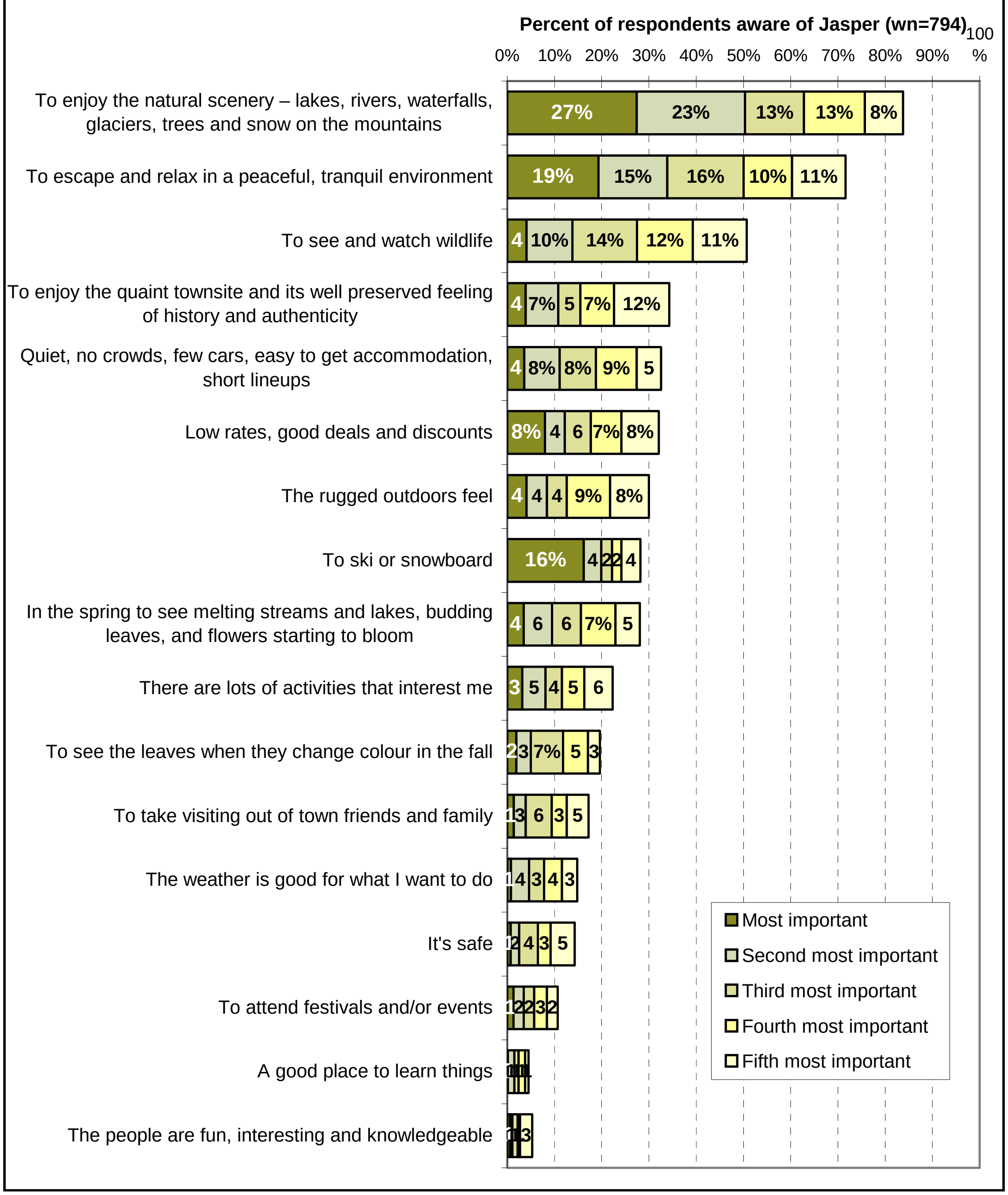
Chart 7: Five most important reasons to visit Jasper in the off-season



SCENERY, RELAXATION AND TRANQUILITY, AND SKIING/SNOWBOARDING WERE PRIMARY ATTRACTORS

Chart 8 overleaf takes the same figures as in Chart 7, but splits them by the order in which they were selected. This reveals further information on the drawing power of the selected dimensions.

Chart 8: Order of selection of top five reasons to visit Jasper in the off-season



In particular, it confirms that the major draw in Jasper is its natural scenery, followed by the ability to relax in a tranquil setting. However, the third most important *motivator* now emerges as being to ski or snowboard. While not chosen as often as many other factors among the top five picks, it was ranked as extremely important by more than half of those who chose it.

Another factor that was chosen somewhat more often as more important, was the availability of low rates or good deals, but this was ranked relatively low by many as well. The dispersion may indicate that, when forced to select five reasons for going to Jasper, for some people off-season rates would be one of the choices, but not necessarily a motivator per se.

Other more frequently selected reasons weighted toward the lower, less influential ranks, were the quaint townsite and the rugged outdoors feel. These could be ancillary reasons for visiting, but are probably not primary motivators.

ACTIVITIES – ESPECIALLY SKIING/SNOWBOARDING – PROVIDE THE MOST IMPORTANT MOTIVATION TO VISIT

There were relatively few differences in selection at all, or in average ranking, among the various **demographic groups**, suggesting that what attracted and motivated people was not strongly linked to such dimensions. Differences that were found included:

- Young Adults were more likely to choose the rugged nature of the destination and the variety of activities of interest as important, while being less interested in hosting visiting friends and relatives or seeing the changing seasons (fall or spring).
- The Mature/Seniors group chose watching seasonal changes (spring and fall) and safety more often than average and skiing/snowboarding and the appeal of other activities less often.
- Women were more likely than men to select the quaint townsite as one of their five top reasons for visiting.
- Spring and fall season changes were of less interest to high income group members than those with lower incomes.
- Grande Prairie and Edmonton residents were more likely to bring visiting family and friends to Jasper, while Saskatoon residents were less likely to do so.

Past and potential future use, knowledge and overall impressions of Jasper provided more insight on which are and are not key motivators:

- Recent winter and fall visitors, Marmot Basin skiers and those with a high potential to visit in the winter, chose skiing/snowboarding as being important at a very high rate. Non-visitors in those seasons and infrequent or non-skiers/boarders chose it less often.
- Increasingly favourable opinions of Jasper were associated with the statement, *There are lots of activities that interest me,* but this factor did not affect the rate of past or potential visits.
- Those who visited recently in winter or who have a high chance of doing so, were less likely to be interested in the changes that occur in nature in the spring and fall. People with little or no

knowledge of the area or with neutral or unfavourable opinions, chose spring changes as a reason to visit more often, suggesting that this factor is not a strong motivator.

- People who had never visited in the off-season were more likely to select *low rates, good deals and discounts* as a reason to visit – and to rank this reason higher than average – especially in the spring. However, they also tended to have little or no knowledge of the area and neutral or unfavourable opinions. In addition, they were clustered among the group with a low chance of visiting in the off-season or in spring, suggesting that low costs, in and of themselves, will not motivate travel to Jasper.
- Past off-season visitors were more likely to select hosting friends and relatives as a reason for visiting in this timeframe.
- People who know a lot about Jasper chose being safe as a reason to visit more often than average. However, this factor did not affect the rate of past or potential visits.
- Those with less favourable opinions of Jasper were more likely to choose festivals and events as a reason for visiting in the off-season, but interest in festivals and events did not appear to impact potential visitation rates.
- People with a higher chance of visiting mid-week ranked being able to escape and relax, the beauty of the spring melt and opportunities to learn things higher than those with a lower chance of visiting mid-week. They ranked safety and low cost lower.

Many differences were found between the **AIO Clusters** that help to define the type of person who is attracted in the different seasons (or not, as the case may be):

- The largest cluster, Sedentary Pleasures, was more likely to pick the quaint townsite and fall colours, and less interested in skiing/snowboarding, other activities or the rugged outdoors.
- Next largest, the Out of Their Element group, were distinctive for choosing the lack of crowding and low rates of the off-season, safety, and festivals/events, as reasons for visiting. Possibly with the exception of the latter, these were all very general and could apply to many regional destinations. They also do not appear to be strong motivators for visiting Jasper. This group selected the rugged outdoors, wildlife watching and natural scenery less often than average, essentially rejecting the very characteristics that appear to define the destination.
- Warm Weather Friends more often chose wildlife watching and the rugged outdoors feel, but were less interested than average in such activities as festivals/events, skiing/snowboarding, the quaint townsite or low costs (the latter presumably because this is the most well heeled of all clusters).
- Busy Bees were particularly attracted by the natural scenery and wildlife and less likely to bring visiting friends and relatives along.
- Young Adventurers were attracted by skiing/snowboarding, the rugged outdoors feel and many other activities of interest to them. Safety, seasonal changes, a lack of crowding and good prices were selected less often.

- Winter Fun members were distinctive for their interest in skiing/snowboarding and other activities, while choosing safety, fall colours and wildlife watching less often than average. [5]

Barriers to visiting Jasper

Major disincentives to visiting in the off-season were the long drive, high cost and difficulty in getting away

Respondents were presented with a list of 13 barriers to visiting Jasper in the off-season. These were identified from critical comments or negative associations generated in the focus groups for the three seasons. They were asked to choose five of the items from the list, in order of importance, as follows: *What are the biggest barriers for you to visit Jasper between October 15 and June 15. Please number the top 5 in order from 1 (most important barrier) to 5 (5th most important barrier)*.

Chart 9 shows what percentage of the population chose each item as one of the top five barriers.

The three most frequently selected disincentives were the long drive to get there, high costs at the destination and that it is hard to get away in this time period (e.g., because of school or work).

The next set of barriers exposed concerns about crowding on long weekends or school holiday periods (the times when many are free to travel) and road conditions, which typically make it a difficult drive to get to Jasper in these seasons.

At a tertiary level was a lack of "buzz", either socially or through media promotion, which makes the destination less visible and means that one may not think of it when planning a pleasure trip.

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[5] A note on safety might be useful here. In the focus groups, safety was discussed in two ways. One was being able to let children roam and play without fear that they would be deliberately harmed (safety from mugging or theft would be the analogy for older people). The other was actively seeking activities that thrill because they could challenge one's mortality. The different clusters probably interpreted the term differently.

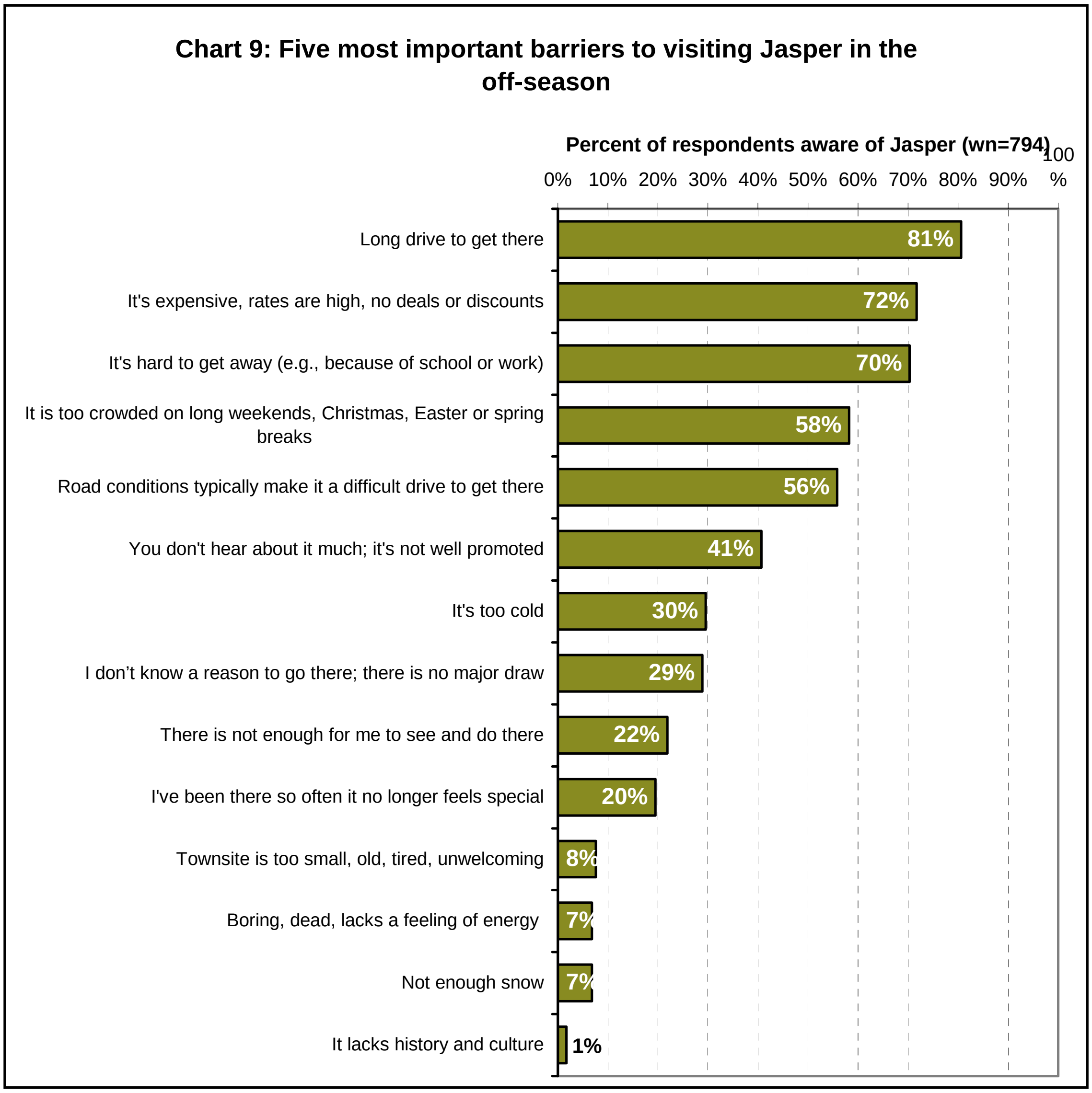
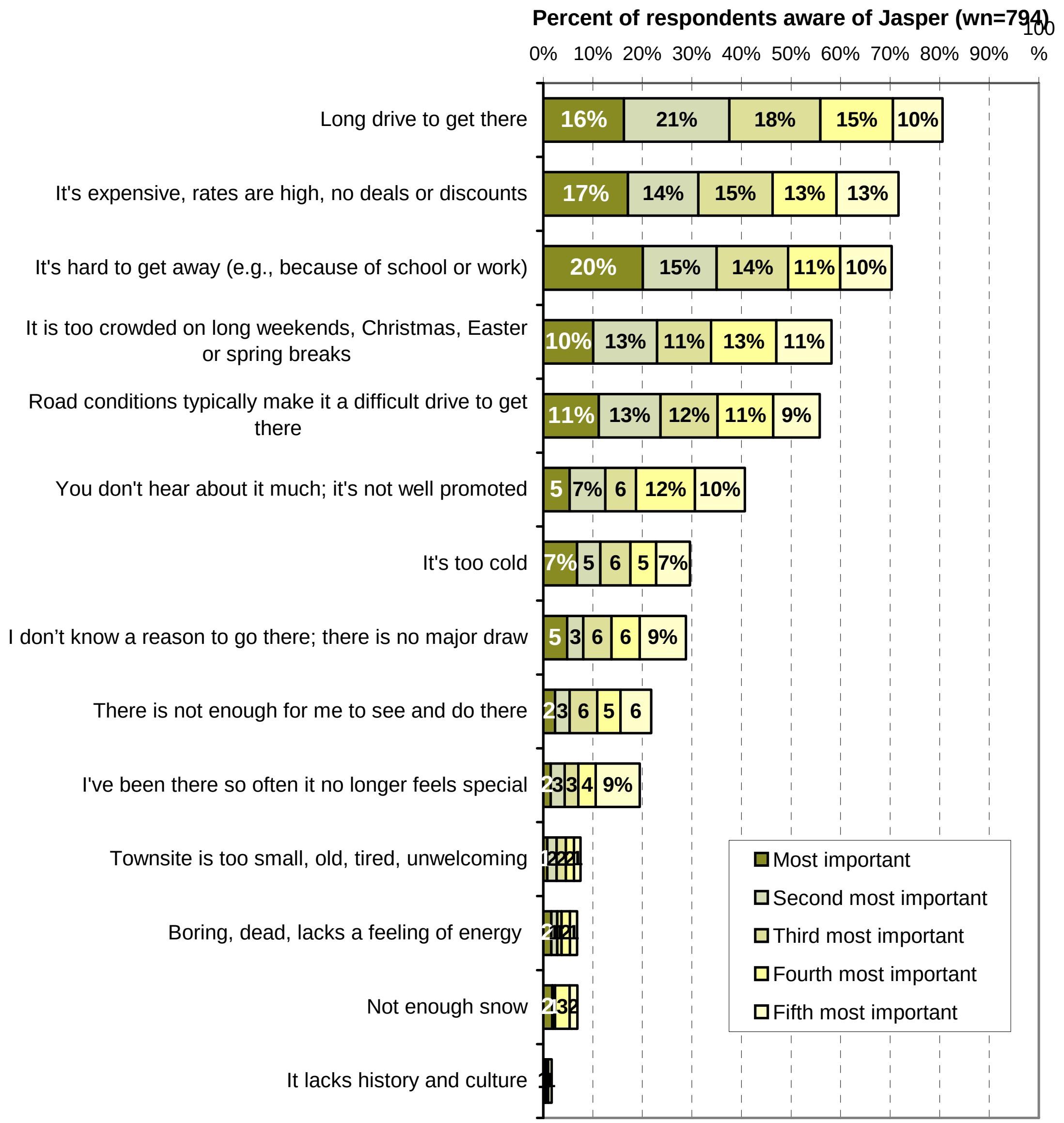


Chart 10 examines the same data, with additional information on the rank order selected by respondents. The results follow a similar pattern to the top five picks considered together in Chart 9, with the exception that at the tertiary level, promotion is joined by perceptions of cold.

Chart 10: Order of selection of top five barriers to visiting Jasper in the off-season



Not knowing a reason to go and low destination visibility were key barriers, along with perceptions of cold and a shortage of things to do

Unlike reasons for going to Jasper, **geographic location** proved to be an important factor in raising barriers to visiting:

- In Grande Prairie, home to perhaps the most enthusiastic supporters of the destination in the off-season, difficult road conditions were selected as a barrier at an above average rate, while chatter and promotion about Jasper was a significantly lesser issue here. In the focus groups, the Grande Cache road was portrayed as a seriously dangerous road (albeit spectacular), especially in the winter. It was described as a narrow shouldered single-lane road, winding and hilly, made more hazardous by logging trucks, animals on the road, and the possibility of being caught in sudden winter storms that reduce visibility and produce icy conditions that land cars in the ditch.
- Edmonton was distinctive for being more likely to say, *I've been there so often it no longer feels special*, and were similar to Grande Prairie residents in not viewing the exposure Jasper gets in the region as a major barrier.
- Calgary residents were significantly more likely to say both that you don't hear much about Jasper and that they did not know why they should go there. They were also concerned at an above average level about road conditions. These primarily related to the condition of the Icefield Parkway in winter.

  Probably in comparison to Banff, concerns about Jasper being expensive and crowded were more muted here than in the other centres. Calgarians were also far less likely to say they have been there so often that Jasper is no longer special.
- More than nine out of ten residents of Saskatoon chose the long drive to Jasper as one of their top barriers, though they were less concerned than average about road conditions.

There were few other **demographic** differences. Those that are notable are that:

- Complaints about it being hard to get away were voiced in all segments, but more by Young Adults and less by the Mature/Seniors group.
- Men were more likely to feel overfamiliar with the destination and ranked cost as a more important barrier than women.
- People in the highest income group who felt the destination was no longer special to them, ranked this reason as more important.

As with motivators, past and potential **future use, knowledge and overall impressions** of Jasper provide some insights on which to distinguish significant barriers:

- Over half the people who had never visited in the off-season indicated that lack of visibility of the destination, and their lack of knowledge of why one should go there (or belief that there is no major draw), were barriers to visiting. The same held true for each of the three seasons individually. The importance of knowing why one should visit is underlined by the finding that recent visitors in all seasons and Marmot Basin skiers/snowboarders ranked this factor lower, even when they selected it.
- People who were less knowledgeable about Jasper or who had neutral or unfavourable views of it, were similarly more likely to cite lack of visibility and knowledge of why to visit … and the same pattern was evident among those with a low chance of visiting in the future. These are clearly key influential factors.
- A higher chance of visiting in the off-season in the future was associated with the choice of such barriers as poor road conditions, having been there often, and not enough snow. As non-visitors were less concerned than average about the amount of snow or having been there too often, these are obviously not serious barriers – two can be circumvented by judicious timing, while many previous visits apparently do not exclude the possibility for more.
- A higher chance of visiting Jasper mid-week was associated with greater choice of the following barriers: having been there so often it no longer feels special and not enough snow. This group was less likely to feel that they don't know why to go there or that Jasper has little visibility. They also ranked the cold lower in importance.
- Cold temperatures were a more significant barrier to those with a lower chance of visiting in the winter than those rating themselves more likely to do so. The cold was not only chosen more often as a top barrier, but also ranked higher among those who were less interested in future visits. It was also an important contributor to neutral or unfavourable overall perceptions of Jasper. As a result, perceptions of temperature/the weather appear to be a key barrier.
- It is interesting that perceptions of crowding on long weekends and school breaks were *more* prevalent among people with very favourable overall opinions, while non-visitors were less concerned than average about such crowding. There are almost certainly other offsetting factors among these groups, such as only being able to get away at such times.

A number of differences were found between the **AIO Clusters** that help to further define them:

- The cluster that is Out of Their Element in Jasper had the most clearly defined profile in terms of barriers to visiting. They were above average in indicating that they do not have a reason to go, in believing that there is not enough for them to do there, in viewing the location as too cold, feeling jaded from previous visits and finding it boring, dead and lacking a feeling of energy. They were less likely to choose such reasons as crowding, cost, driving conditions en route or being hard to get away. It is evident that this group is deterred by their perceptions of the destination itself.
- Also well defined are Young Adventurers. Barriers chosen at an above average rate in this cluster were: difficulty in getting away due to school and work, and crowding over long weekends and holidays. This cluster was less likely to mention the townsite as a deterrent, the amount to see and do, feeling that it is no longer a special place, or being too cold.

- The Winter Fun cluster differed from average in choosing road conditions more often, and not knowing a reason to go and the cold less often.
- Warm Weather Friends were less likely than average to be concerned about driving conditions, while Busy Bees and Sedentary Pleasures members did not differ from the population in any particular manner.

Interest in alternative transportation options

THERE WAS LITTLE INTEREST IN TRAVELLING BY PLANE TO HINTON

It had been anticipated that distance would be an important deterrent to visiting Jasper, so reactions to alternative transportation options – air and train – were tested in both the focus groups and survey. As a result of the qualitative findings, a scenario was presented for each option simply as transportation, while a second scenario positioned it as part of a package.

For air, the questions asked were: *What are the chances that you would take a trip to Jasper between October 15 and June 15 by plane, flying into Hinton airport from your city, and then taking a shuttle bus or rental car to Jasper,* and, *What are the chances you would fly to Hinton between October 15 and June 15, as part of a package that also included such things as transportation from Hinton to Jasper, accommodation and an activity (e.g., skiing or a guided tour, etc.), with details organized to meet your needs.*

Using the Juster Scale, the average rating for the transportation-only option was 0.68, indicating a potential market of 7% of the population. Not a single person gave this idea a rating of 9 or 10 (almost sure, certain or practically certain). Interest was, however, higher for the package option at 1.50 or 15%.

Based on focus group discussions, low interest was heavily influenced by the assumed costs of air transportation. An additional disincentive was the total travel time and stress now associated with flying (e.g., the need to be dropped off, time for check-in, baggage handling and security screening, and flying itself). Few knew the Hinton airport and assumed it would be small, require small planes and be dangerous to land in. There was one person who had flown there who talked about the danger of wind sheer. Many objected to being without a vehicle in Jasper, preferring their own schedule and to have space for their gear.

Significant inter-group differences were limited:

- There were no significant differences by **geographic location** despite the scenarios indicating departure from the home city. Based on focus group comments, in Edmonton, flying to Jasper was considered an odd thing to do.
- Lower **income** households were more interested in the transportation-only option than average (10%).

- Among the **segments and clusters**, Mature/Seniors (10%) and Out of Their Element group members were less interested in the package option (8%).
- Higher **potential mid-week visitors** also rated air access higher at 11% for the air-only option and 21% for the package, making them the most interested group of all.

A VIEWING TRAIN COULD BE A SOUGHT AFTER EXPERIENCE

VIA introduced the Snow Train Express this winter, travelling from Edmonton to Jasper late Friday afternoon and returning on Sunday night. The concept was discussed in the focus groups, supported by display of a poster (see Appendix III).

The questions asked about train travel in the survey were as follows: *What are the chances that you would take a trip to Jasper between October 15 and June 15 by train, in a Panorama viewing car, from Edmonton,* and, *What are the chances that you would take a Panorama viewing train to Jasper from Edmonton between October 15 and June 15, as part of a package that also included such things as accommodation and an activity (e.g., skiing or a guided tour, etc.), with details organized to meet your needs*.

Interest in train travel was considerably higher than for air transportation, achieving a Juster Scale rating of 2.14 or a market potential of 21% for the train-only option, and 2.41 (24%) for a train package – very positive considering that three-quarters of the survey participants would need to travel to Edmonton first.

The qualitative research revealed that enthusiasm for this concept was primarily based on the mode itself, rather than train travel as a means of getting to Jasper. In fact, many considered that the train would be highlight of the trip. Reasons for the enthusiasm differed by lifestage:

- Most Young Adults had never been on a train and many wanted to experience it. They thought it would be cool, a fun thing to do and an adventure … with a party included.
- Families saw it as offering their children an interesting new experience which would create memories for them. Since it was assumed there would room for them to move around, along with washrooms, it was considered less confining – and stressful – than a car trip. There would, however, be a need for activities and entertainment for the children. Parents sometimes viewed it as an opportunity for putting together a special, adult-only, romantic getaway, leaving the children with grandpa and grandma in Edmonton.
- Mature/Seniors saw the train as interesting for them and something for their grandchildren too. Several expressed interest in other scenic trains that cross the Rockies. Some viewed it as an opportunity for a cozy, sociable experience, with good food and drink – something like one might experience on a cruise. It would also be more comfortable for arthritic limbs.

Overall, a train trip was viewed as a one-off or rare experience, but one they would like do. Part of the reason was the price (discussed as $120 each way or $500 for a ski package), particularly for a family. Comments were made that one could go to Mexico or Las Vegas for the same package price.

On the other hand, it took only a few minutes in each focus group for a participant to realize that most of the trip would be in the dark and that by the time the mountains were reached it would definitely be dark. This gave rise to comments like, "What's the point of having a viewing train in the dark?", or that it defeats the purpose.

In the focus groups outside Edmonton, there were many who were sufficiently enthused that they felt, at least initially, they would make the drive there to catch the train. On reflection though, some felt there would be too much driving and that the schedule (scheduled arrival in Edmonton at 11:30 pm on Sunday night) made it too late to drive back home.

There were also those who remembered similar ski party trains and buses from years before which held negative associations with drunks and drugs.

Looking at the various groups, differences that were found in the survey included the following:

- **Higher potential future visitors** were more interested in the train in every season: fall (29% train-only and 32% for the package), winter (27% and 32%), spring (27% and 30%) and even more by higher potential mid-week visitors (33% and 35%).
- The train was not a way of luring **past non-visitors** to Jasper in the off-season, since their ratings were well below average.
- On a **geographic** basis, perhaps not unexpectedly, interest was highest in Edmonton at 29% for the train-only option and 33% for the package. It was lowest in Calgary at 16% and 19% respectively, and average in Grande Prairie and Saskatoon.
- Out of Their Element **cluster** members were less enthused than any other cluster.

Interest in the experiences that Jasper has to offer

Keeping warm while relaxing and wildlife watching were the top activity picks

A list of 34 experiences that are offered in Jasper in the off-season was compiled and respondents were asked to indicate which ones were of interest to them. Eleven were chosen by each person on average. The question asked was: *Which of the following would you be interested in experiencing in Jasper between October 15 and June 15: Select all that apply.*

The overall results are shown in Chart 11. They are striking because four of the top five activities deal with relaxing while keeping warm (sitting in a hot tub, by an indoor fireplace or outdoor bonfire, and relaxing and rejuvenating), combining a key reason for visiting with multiple solutions to combat the cold. Wildlife watching, the remaining item, is confirmed here as a hallmark of the Jasper experience.

The next cluster of four activities also are weighted to the sedentary side (sightseeing, photography and a scenic lake cruise) and support the most important reason for visiting, the natural scenery. Hiking on a trail was the only activity in this group involving any exertion at all. Even this may be more a matter of "walking" on a trail than a rigorous hike.

Easy participation and man-made options continued to form the third cluster – swimming in a pool, a horse drawn sleigh or wagon ride, camping in a campground and visiting a museum or exhibit.

Higher intensity outdoor activities like downhill skiing, trail riding, fishing, golfing, river or whitewater rafting, canoeing, kayaking or rowing, tobogganing, an ice walk, backcountry backpacking, ice skating, snowboarding, mountain biking, cross-country skiing, ice climbing, snowshoeing or backcountry ski touring were each the choice of a minority, yet they are the types of activities that people associate with Jasper when asked what comes to mind.

To some degree, this alignment represents a disconnect between what is on offer and what people think about when looking at Jasper as a destination. Further examination of the data, however, shows how different types of activities are associated with different target markets and provides a view of which ones offer opportunities to stimulate off-season travel.

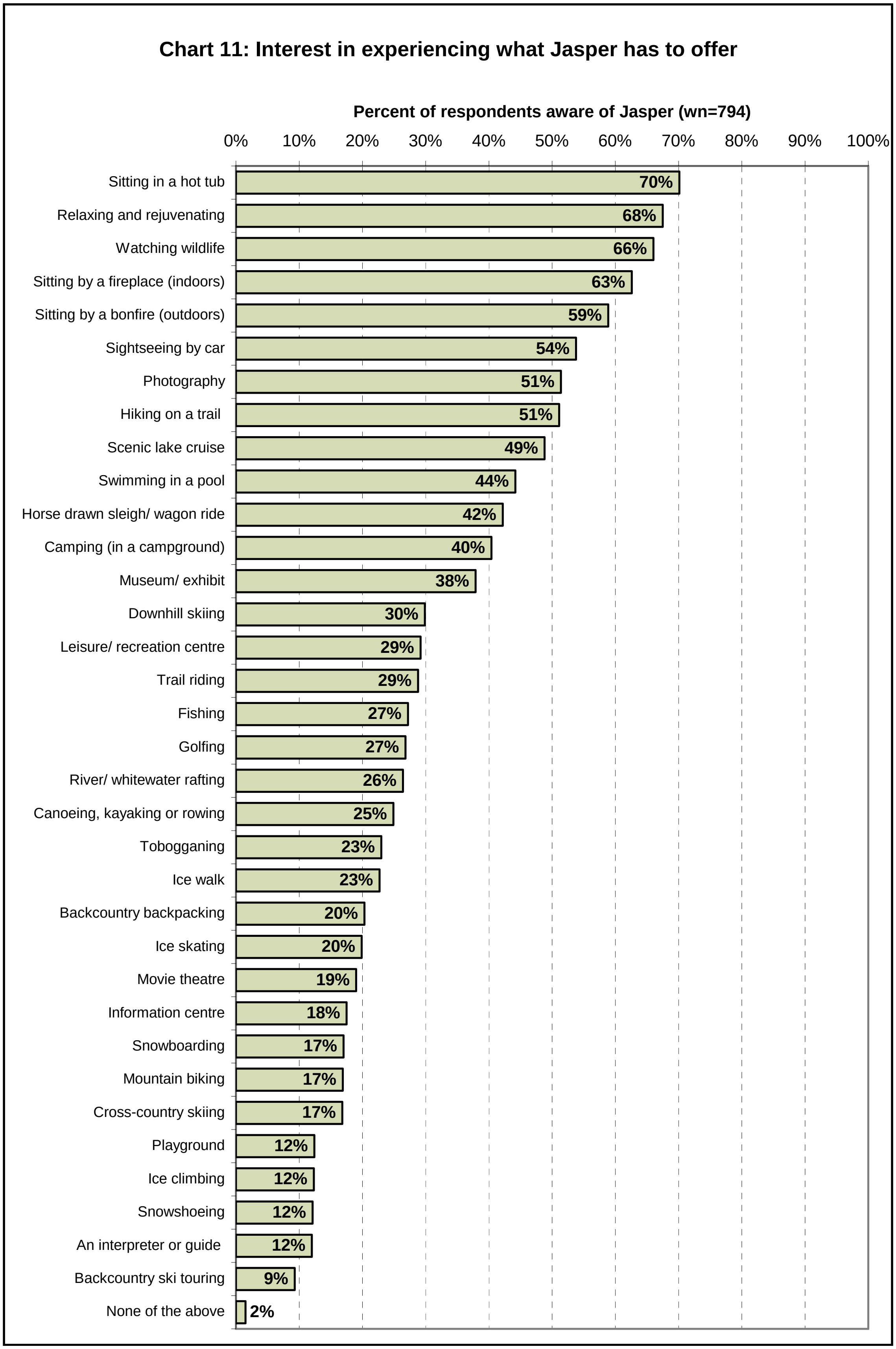


Chart 11: Interest in experiencing what Jasper has to offer
Percent of respondents aware of Jasper (wn=794)
0%
10%
20%
30%
40%
50%
60%
70%
80%
90%
100%
Sitting in a hot tub
70%
Relaxing and rejuvenating
68%
Watching wildlife
66%
Sitting by a fireplace (indoors)
63%
Sitting by a bonfire (outdoors)
59%
Sightseeing by car
54%
Photography
51%
Hiking on a trail
51%
Scenic lake cruise
49%
Swimming in a pool
44%
Horse drawn sleigh/ wagon ride
42%
Camping (in a campground)
40%
Museum/ exhibit
38%
Downhill skiing
30%
Leisure/ recreation centre
29%
Trail riding
29%
Fishing
27%
Golfing
27%
River/ whitewater rafting
26%
Canoeing, kayaking or rowing
25%
Tobogganing
23%
Ice walk
23%
Backcountry backpacking
20%
Ice skating
20%
Movie theatre
19%
Information centre
18%
Snowboarding
17%
Mountain biking
17%
Cross-country skiing
17%
Playground
12%
Ice climbing
12%
Snowshoeing
12%
An interpreter or guide
12%
Backcountry ski touring
9%
None of the above
2%

CLUSTERS OF ACTIVITIES POINT THE WAY ON WHAT TO PROMOTE

On the whole, there were no differences between the **geographic markets** in the array of activities that were of interest. There were, however, a number of other **demographic** differences of interest:

- Men were more frequently interested in golfing and mountain biking than women. Women chose relaxing and keeping warm (relaxing and rejuvenating, sitting by a fireplace or bonfire), a scenic lake cruise, and horse-related activities (horse drawn sleigh or wagon ride, trail riding) more often than men.
- Families were very similar to the average except in two respects that reflected on activities for their children. These were: a high level of interest in tobogganing and use of a playground. Tobogganing was also of interest in the Young Adult group, but playgrounds were not.
- Young Adults and Mature/Seniors proved to be polar opposites in their activity needs. For the most part this was a reflection of their differing age and physical abilities. Where there was an above average choice of an activity by the Young Adult group, it was always chosen at a below average rate by Mature/Seniors group members. These activities included: sitting in a hot tub or by a bonfire, trail hiking, camping, rafting, boating, downhill skiing, backcountry backpacking, trail riding, mountain biking, snowboarding, an ice walk, ice skating, ice climbing and back country ski touring. In addition, Young Adults found far more of interest from the list than Mature/Seniors, selecting an average of 15 vs. 9 experiences.

Which experiences distinguish visitors from non-visitors? Potential visitors from those less interested? Unlike the motivators and barriers, **visit behaviour** was not an important distinguishing factor for activities.

- Downhill skiing/snowboarding has already been identified as a major motivator, and the current data show that while interest in both sports was associated with a higher propensity to be recent winter visitors, interest in downhill skiing was more widespread than in snowboarding (48% vs. 30% of recent winter visitors). People interested in downhill skiing were more likely than average to have visited in each of the shoulder seasons as well. Furthermore, downhill skiing was associated with a high chance of visiting Jasper in the future in the winter and the fall, while snowboarding tended to influence only future winter visits.
- Recent and likely future winter visitors also showed greater interest in other challenging sports like whitewater rafting, an ice walk, backcountry backpacking and mountain biking. In addition, a high chance of future winter visits was associated with interest in boating, ice skating, cross-country skiing and ice climbing.
- There were virtually no defining activity choices among recent past spring and fall visitors. In the fall, recent visitors and high potential visitors chose trail hiking as an activity of interest at an above average rate. Additional activities of interest to higher potential future fall visitors included: sitting in a hot tub, downhill skiing, tobogganing, an ice walk and ice climbing. As many

of these may not be fall activities (depending on prevailing weather conditions), they reflect the finding that certain winter visitors have high potential to also be fall visitors.

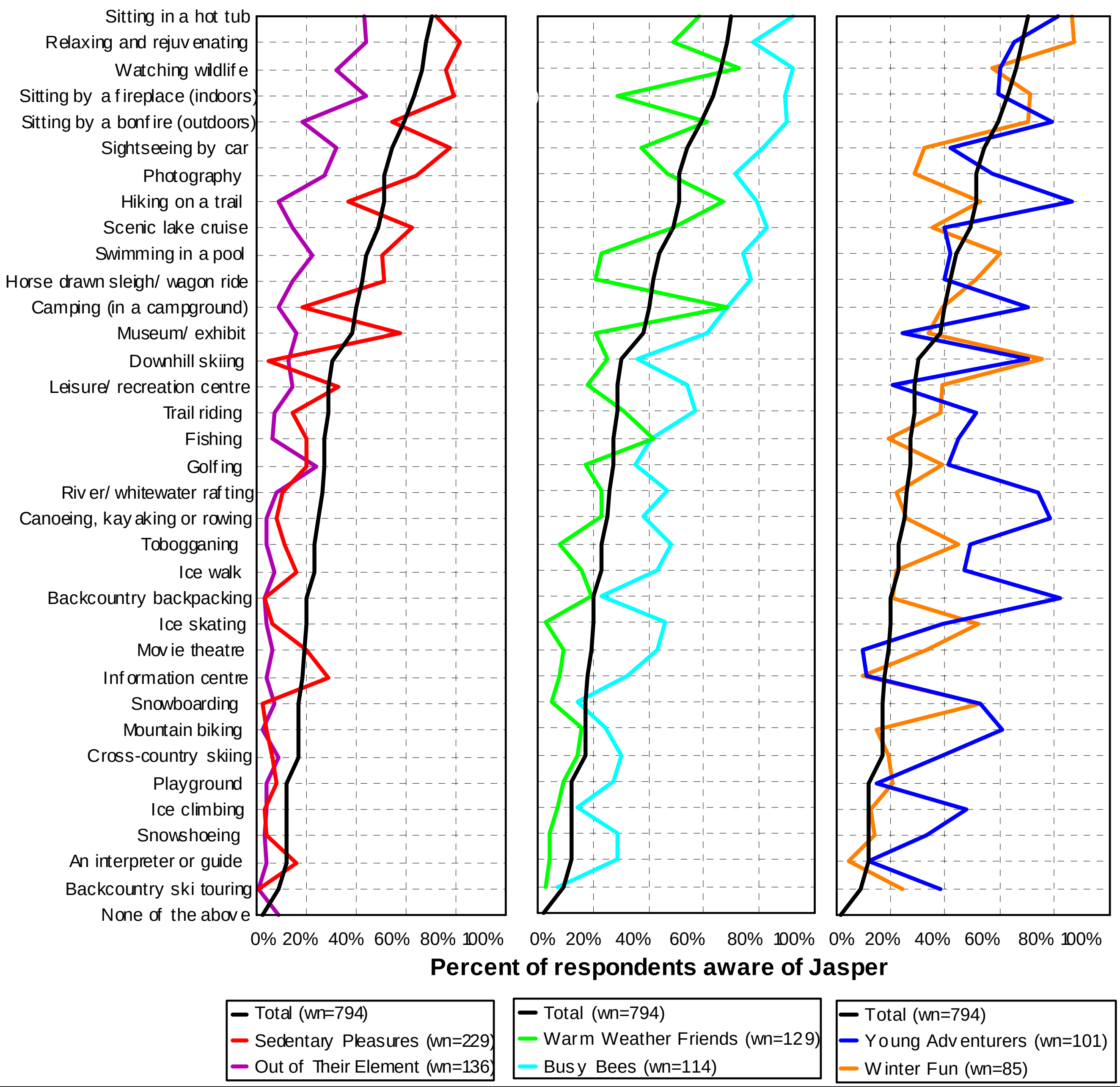
- There were no similar outstanding activity picks among recent spring visitors and, among higher potential future spring visitors, hiking on a trail and golfing were the only distinguishing activities to emerge.
- Among higher potential mid-week visitors, sitting by an indoor fireplace, photography and cross-country skiing were selected more often than by those with a lower interest in mid-week travel.
- Overall, people who had visited in the off-season were much more likely to be interested in doing photography in Jasper than those who had not, while sitting by an indoor fireplace was a strong choice of higher potential off-season visitors. An indoor fireplace tended to be linked to a high level of knowledge of Jasper and favourable overall attitudes as well.

Experiences proved to be of great importance in distinguishing between the **AIO clusters** and provide insight into which combinations of activities to promote to tell a story about Jasper. Chart 12 profiles each one visually.

- Members of the Out of Their Element cluster were the least likely of all to be interested in *any* of the experiences on offer (average number selected, 5) and the only group to have anyone indicate that there was not a single activity of interest to them in Jasper. The only point at which they approached a normal level of interest was for golfing.
- The large Sedentary Pleasures cluster was also underrepresented on many items, most notably anything requiring physical exertion. However, unlike the Out of Their Element group, they did identify interest in some activities at an above average rate (10 items selected on average).

  These were more leisurely pursuits, both indoors and out, like relaxing when sitting by a fireplace, watching wildlife while sightseeing by car, taking a scenic lake cruise, going on a horse-drawn sleigh or wagon ride, or swimming in a pool. This group had an above average interest in learning, mentioning visiting a museum or exhibit, and using an information centre.
- Warm Weather Friends formed another cluster with a narrowly defined interest in Jasper experiences (9 items selected on average). Their above average choices reflected a desire to be outdoors – camping in a campground, hiking on a trail and fishing. In the off-season, these are, at best, spring and fall activities and highly dependent on the weather, hence the cluster name. This is further confirmed by the winter and indoor or built/manmade activities that they selected at a significantly below average rate. For example, they were underrepresented in choosing ice skating, tobogganing, snowboarding and snowshoeing … or sitting by an indoor fireplace, a movie theatre, leisure centre or indoor pool.

Chart 12: Interest in experiencing what Jasper has to offer by AIO Cluster



- Busy Bees were notable for their high level of choice of virtually every activity listed and chose the largest number of activities from the list (17 on average). Their dozen or so top interests followed the same pattern as the population overall, but at a higher level. In comparison to other clusters, they were especially interested in a swimming pool, recreation/leisure centre, a playground and a movie theatre, reflecting the fact that many were from the Families lifestage and look for things to keep their children amused and occupied. They were also the segment most interested in education, making up the highest proportion showing interest in wildlife watching, a museum/exhibit, an information centre and an interpreter or guide. In part, this reflects the desire of many families to use travel as a source of learning for their children.

- People in the Winter Fun cluster selected most outdoor winter/snow sports activities at a very high rate, being especially likely to choose downhill skiing, snowboarding, and ice skating, and were above average in their interest in tobogganing, and backcountry ski touring. They appeared to be equally interested in après ski activities, showing a higher than average desire to relax and rejuvenate, sit in a hot tub, swim in a pool or go to a movie theatre. The average number of activities of interest to this group was 13.
- Young Adventurers were similar in some respects to the Winter Fun cluster, in that they expressed a strong interest in downhill skiing and snowboarding, tobogganing, backcountry ski touring and ice skating. However, their outdoor interests were far more diverse and showed a desire for physical challenge of all types, which would cross into the shoulder seasons. In particular, they stood out in their selection of backcountry backpacking, canoeing, kayaking or rowing, river or whitewater rafting, mountain biking, and ice climbing. They were also interested at an above average rate in trail hiking, sitting by a bonfire, camping, and trail riding. Young Adventurers almost rivalled Busy Bees in the number of activities of interest at 17 (rounded), though they were more directed in their choices.

Interest in Jasper's attractions

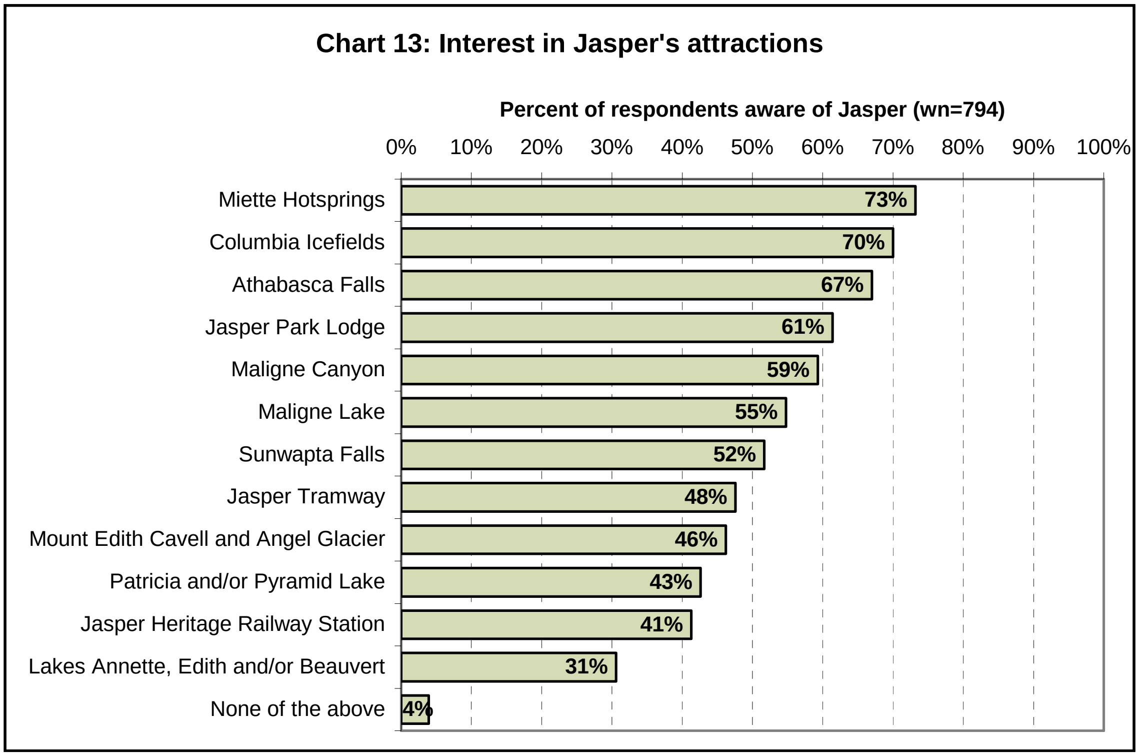
WARM WATER TOPPED THE LIST AGAIN

12 attractions that are open in the off-season were listed and respondents were asked, *Which of the following would you be interested in visiting in Jasper between October 15 and June 15: Select all that apply*. Some of the attractions are only accessible in the shoulder seasons, and sometimes only for part of the season. The proportion that chose each attraction is shown in Chart 13.

The seasons under consideration clearly remained foremost in people's minds as they made their selections, with the result that Miette Hotsprings – which is only open for a month or so in late spring – was the top pick, being chosen by three out of four.

Next came the Columbia Icefields, Athabasca Falls and Jasper Park Lodge (JPL), followed by Maligne Canyon and Maligne Lake.

The only other fully man-made attraction, the Jasper Heritage Railway Station, was near the bottom of the list, emphasizing the strong positioning of the JPL. The frequency and manner in which the JPL was referred to in the focus groups, suggests that it has achieved almost iconic status. Many people remembered it fondly for its affordable specials, visualizing staff riding their bikes to the cabins, sitting around the fireplace in the lodge, swimming in the indoor/outdoor pool and skating on Lac Beauvert with hot chocolate and bonfires to keep them warm. It was referred to by many young skiers reminiscing about trips they had taken with their parents. JPL's status at present is linked to events that are associated with it, such as Christmas in November. Although the off-season deals of the past were not seen to be available anymore, staying at the JPL had a draw and mystique all its own.



One caveat is in order. Since choice was being made from a list without a picture or description of the attraction, the name "Jasper Tramway" may not always have been understood to refer to an aerial cable car, but to a street tram. The reason for this uncertainty is partly that focus group respondents were hard pressed to come up with the correct name of the attraction, even when they had been there. Furthermore, in the survey, people who were interested in historical attractions tended to show more interest in the Jasper Tramway; however, they also tended to be more interested in less physically challenging activities, so there may or may not have been confusion.

MALIGNE LAKE AND MALIGNE CANYON WERE KEY CONTRIBUTORS TO JASPER'S IMAGE … AND SOME DISCRIMINATED BETWEEN BUILT AND NATURAL ATTRACTIONS

As with experiences/activities, there were only a few **demographic differences** of note:

- Young Adults selected Patricia and Pyramid Lake more often, Families were more interested in the Jasper Tramway.
- Saskatoon residents were less interested in Maligne Lake than average.

- More women chose the JPL as a place of interest than men.

Analysis by **past and potential future visit patterns, knowledge and opinions** showed a variety of significant differences:

- Maligne Canyon and Maligne Lake stood out for being associated with greater knowledgeability and more favourable attitudes, suggesting that they are important contributors to the image of the destination.
- People who had a neutral or unfavourable opinion of Jasper National Park were less interested in any of its attractions, with the exception of the Jasper Heritage Railway Station and Sunwapta Falls. As interest in the Railway Station was higher among non-skiers as well, it may be that these attractions fill a need for places to see that have perhaps not been visited before.
- Miette Hotsprings was of greater interest to people who had previously visited in the off-season than those who had not, suggesting that experience underlies the need for warmth.
- High potential off-season visitors, including mid-week visitors, selected the following attractions more often than those with a lower likelihood of visiting: the JPL, Maligne Canyon, Maligne Lake, the Jasper Tramway, Patricia and Pyramid Lakes, and Lakes Edith, Annette and Beauvert.

  The same differences were found individually in the spring and fall, but in the winter only the JPL, and lakes near the townsite showed this differential. In the fall, an additional site of greater interest to higher potential visitors was Athabasca Falls.
- Recent visitors showed similar patterns of interest in the lakes and Maligne Canyon. Fall visitors had a higher than average level of interest in Mount Edith Cavell/Angel Glacier.
- Fall and spring visitors who chose JPL were more likely to have visited longer ago (more than 5 years), while past winter visitors (both more and less recent) were more interested in this site than non-winter visitors.

The **AIO Clusters** differed quite substantially in the number and type of attractions of interest to them:

- Out of Their Element members were significantly less interested in Jasper's attractions than any other group, with almost one in five not selecting even one and an average of 3 choices being made. The most frequently chosen (by one in two), were Miette Hotsprings and the JPL. Taken together with their disinterest in most activities Jasper offers, it would seem this group prefers other types of pleasure travel – perhaps a more sophisticated urban or international destination, or a warm weather, sea, sun and sand experience. This would be consistent with what was heard from many focus group participants when discussing off-season travel.
- Sedentary Pleasures members (average 8 choices) showed above average interest in the Jasper Heritage Railway Station in particular (which fits with their interest in heritage and learning), also Athabasca Falls, Columbia Icefields, the JPL, Maligne Canyon, Sunwapta Falls and the Jasper Tramway.

- Warm Weather Friends, like the Out of Their Element group, were less interested in almost all attractions, making an average 4 choices. As with experiences, they selected built attractions like the JPL, Jasper Heritage Railway Station and Jasper Tramway at an especially low rate. The only site chosen at a rate approaching the average was Maligne Lake.
- Busy Bees were a complete contrast, choosing all attractions not only at above average rates (11 items selected on average), but with selection of each one generally around the 90% level. This cluster is interested in almost everything.
- As with activities, Winter Fun was a more focused group, choosing 5 attractions of interest on average. The only one selected at an above average rate was the JPL, again emphasizing the importance of attributes that supplement their primary ski/snowboarding activity. They were less interested in the lakes in the area, Mount Edith Cavell and Sunwapta Falls.
- Young Adventurers confirmed their love of the outdoors by picking all the natural attractions at a rate well above average, choosing 8 items on average.

Satisfaction with past Jasper trips

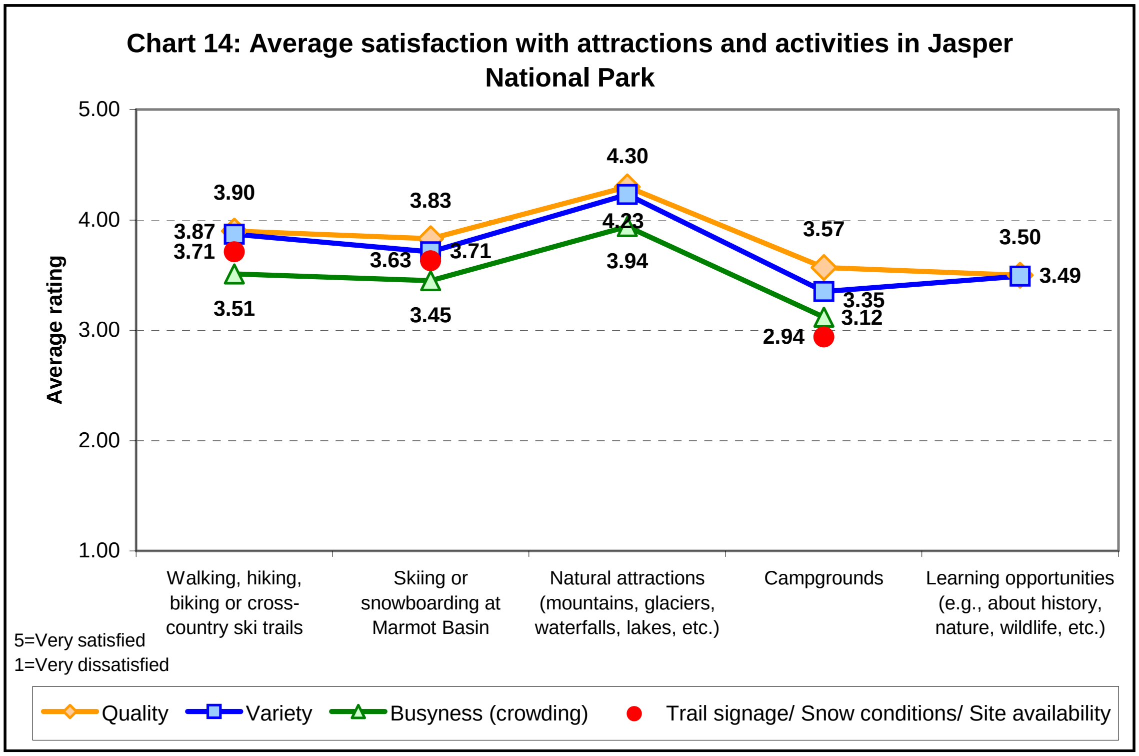
NATURAL SCENIC ATTRACTIONS STOOD OUT IN DELIVERING SATISFACTION IN JASPER NATIONAL PARK

Respondents who had visited Jasper in the off-season at any time in the past were asked to rate their satisfaction with select attractions and activities or services in Jasper National Park on a number of criteria. The question asked was, *How satisfied were you with the quality, variety and "busyness" (or number of people there) of attractions and activities in Jasper National Park on your visit/s between October 15 and June 15: Enter a number between 1 and 5, where 1 = "very dissatisfied" and 5 = "very satisfied" for each. 9 = "no opinion".*

Average ratings were calculated for each activity and are shown in Chart 14. A number of conclusions can be drawn from these scores:

- Jasper National Park's natural scenic attractions received a higher level of approbation than any of the other attributes tested, for quality, variety and (lack of) crowding.
- The two other attractions rated, trails for walking, hiking, biking or cross-country skiing, and skiing or snowboarding at Marmot Basin, also received satisfactory ratings on all criteria. Signage on trails and snow conditions at Marmot Basin were well regarded too.
- The two activity or service items, campgrounds and opportunities for learning, achieved lower, but still positive satisfaction scores for quality and variety.
- Crowding was rated somewhat less well than quality and variety for all items, with campground crowding and site availability rated lowest of all, at the neutral level on average (neither satisfactory nor unsatisfactory). Given the importance of quiet, calm, tranquillity and peace to

achievement of relaxation – a prime motive for visiting Jasper in the off-season – this response bears watching.



The actual ratings provided are shown in Chart 15, offering further information on perceptions:

- Since enjoyment of the natural scenery is *the* major reason people go to Jasper National Park, it represents the highest ratings likely to be achieved by the destination – yet there still appears to be room for more or better. Over half of those providing a rating gave it the top score of 5 for quality and variety, and four out of five chose the top two boxes (satisfied or very satisfied). That leaves 20% providing a neutral or negative rating. Based on the focus group discussions, it was evident that some people just were not captured by the scenery, either preferring Banff National Park or not having been exposed to anything beyond what can be seen from the Yellowhead Highway.
- Jasper National Park trails received the highest possible rating of "very satisfied" for quality and variety from about one-third of respondents answering, with about two-thirds providing a positive, top two box rating. Traffic on the trails was given a neutral or negative rating by more

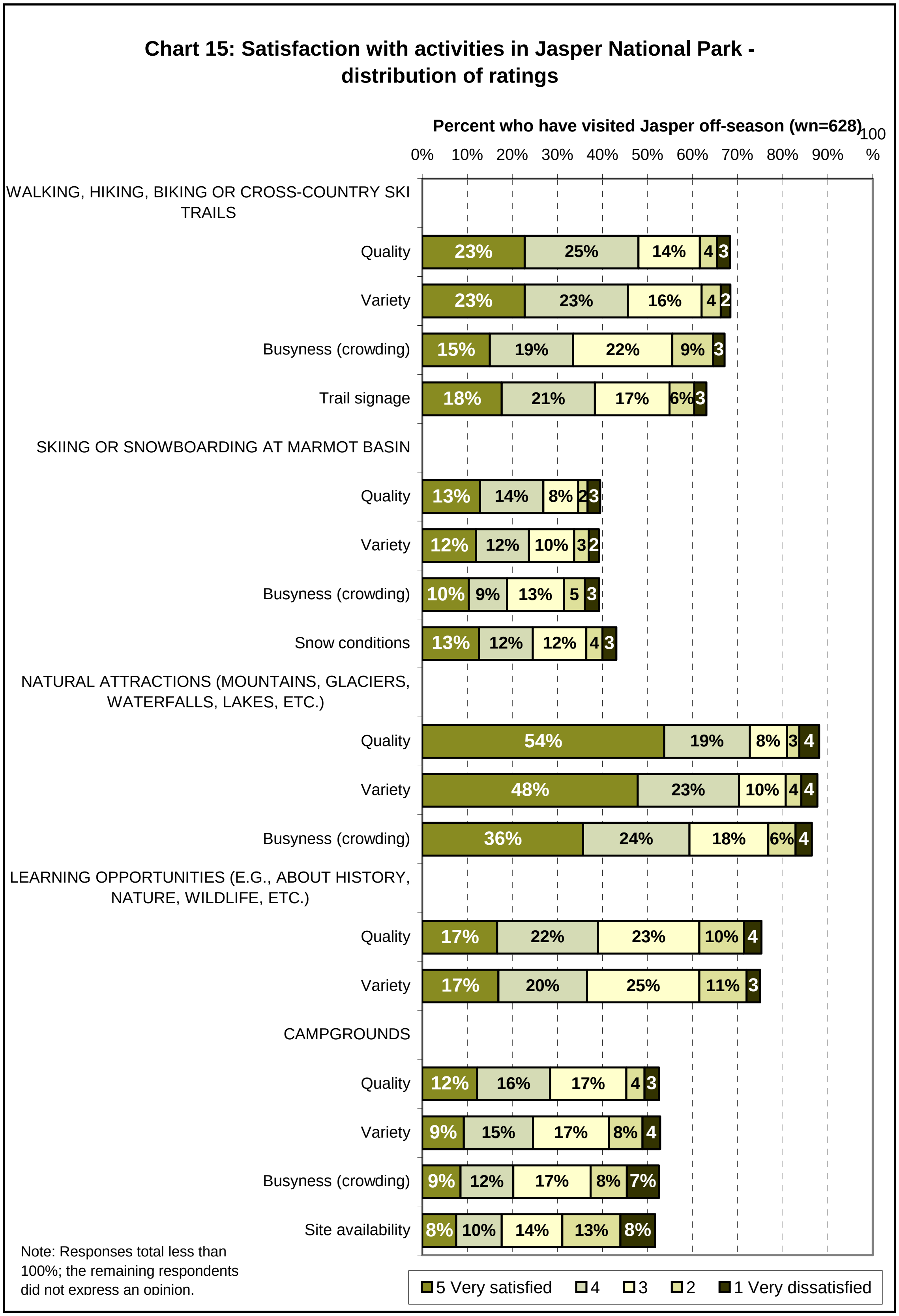


Chart 15: Satisfaction with activities in Jasper National Park - distribution of ratings
Percent who have visited Jasper off-season (wn=628)
0% 10% 20% 30% 40% 50% 60% 70% 80% 90% 100%
WALKING, HIKING, BIKING OR CROSS-COUNTRY SKI TRAILS
Quality 23% 25% 14% 4 3
Variety 23% 23% 16% 4 2
Busyness (crowding) 15% 19% 22% 9% 3
Trail signage 18% 21% 17% 6% 3
SKIING OR SNOWBOARDING AT MARMOT BASIN
Quality 13% 14% 8% 2 3
Variety 12% 12% 10% 3 2
Busyness (crowding) 10% 9% 13% 5 3
Snow conditions 13% 12% 12% 4 3
NATURAL ATTRACTIONS (MOUNTAINS, GLACIERS, WATERFALLS, LAKES, ETC.)
Quality 54% 19% 8% 3 4
Variety 48% 23% 10% 4 4
Busyness (crowding) 36% 24% 18% 6% 4
LEARNING OPPORTUNITIES (E.G., ABOUT HISTORY, NATURE, WILDLIFE, ETC.)
Quality 17% 22% 23% 10% 4
Variety 17% 20% 25% 11% 3
CAMPGROUNDS
Quality 12% 16% 17% 4 3
Variety 9% 15% 17% 8% 4
Busyness (crowding) 9% 12% 17% 8% 7%
Site availability 8% 10% 14% 13% 8%
Note: Responses total less than 100%; the remaining respondents did not express an opinion.
5 Very satisfied
4
3
2
1 Very dissatisfied

than half, while trail signage was viewed predominantly positively (about 60%). Contributing to the quality rating were perceptions of cleanliness and safety, while trails for all abilities, including easy walking trails, would have impacted ratings of variety. Signage included consideration of the number and ease of reading directional signs, as well as interpretation boards.

About one in three respondents were unable to provide a rating at all, suggesting that trails are not extensively used in the off-season. This was supported by people in the focus groups who claimed they had never been on a trail.

- About 40% of all respondents gave an opinion of skiing or snowboarding at Marmot Basin, representing the population segment with such experience. Among those who did so, about 30% were clearly enthused no matter what, offering a rating of "very satisfied" for all four attributes. At the next rating level though, differences began to emerge, with crowding showing a lower top two box score, while a significant number expressed dissatisfaction (about 20%).

  Variety ratings would have included judgement of the selection of runs for all levels of skier and quality would include the chair lifts, use of the mountain faces and the runs themselves.

- The opportunity for learning experiences was rated satisfactory or very satisfactory by about two in five offering an opinion. More remarkable, however, was how many actually did so, given the relative lack of interest in "formal" learning opportunities in Jasper (e.g., an interpreter or guide, museum or historic site).

- Campgrounds were rated by just over half the respondents, which probably reflects the number having had such an experience in Jasper National Park – and perhaps not all of them had camped in the off-season. In the focus groups, those who had experience camping in the spring complained about low temperatures, rain and mud, and for the fall there was discussion of snow on the ground and unpredictability of temperatures. These are experiences one might anticipate would depress the quality rating.

  The ratings for the different criteria differed from each other, with the highest overall score being found for quality. Decreasing positive scores were offset by increasing negative scores (rather than neutral ratings) from quality to variety to crowding to site availability, suggesting that perceptions are sharply divided.

  Warm showers and campsites with a fair degree of privacy contributed to the quality ratings. With regard to site availability, focus group participants complained about the fact that bookings need to be secured months in advance and that last minute arrival was just not a option.

Little further insight into the ratings comes from the analysis of **demographic** or **cluster** data. However, a few interesting differences were found:

- People in the middle income group were more satisfied with the camping than those with higher or lower incomes, especially for variety of campsites.
- Busy Bees expressed greater satisfaction with the quality and variety of natural scenic attractions and the opportunities for learning. The latter is especially important as this was the cluster most interested in learning.

- The Winter Fun cluster gave significantly higher ratings on crowding at Marmot Basin than others, a positive response from a group whose primary motivation for visiting would be downhill skiing and snowboarding.

On a **behavioural** level, there were also a few items of interest:

- Higher potential visitors in the spring were more satisfied with their past experiences on all attractions and activities measured than those who have lower potential to visit. Specifically, this included trail use (quality, variety, crowding and signage), natural attractions (quality, variety and crowding), opportunities for learning (quality, variety), camping (quality) and snow at Marmot Basin.

  As spring will attract a larger number of visitors than the other two seasons, an important reason may be that it presents the opportunity to visit in warm weather – especially toward the end of the defined season (April 1 – June 15) – with less competition from other visitors than in the summer.

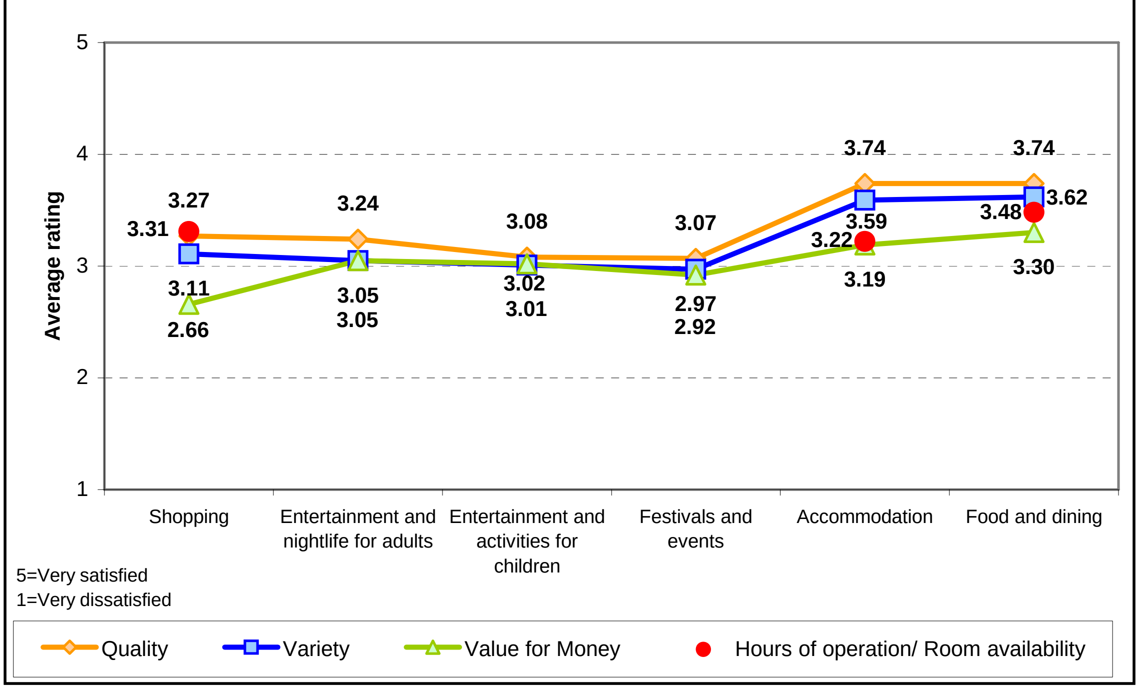
- In the fall, the quality of the activities/attractions appeared to be the most important draw as higher potential visitors gave higher ratings for the quality of natural attractions, learning opportunities, skiing, snow and camping.
- High potential winter visitors and recent Marmot Basin skiers centred their above average ratings on the quality of skiing on offer. On the other hand, non-winter visitors expressed unusually high levels of dissatisfaction with crowding at Marmot Basin, suggesting this perception can be an important barrier.
- People with a high propensity to visit mid-week in the off-season expressed greater satisfaction with the quality and variety of learning opportunities available and the quality of camping than those who prefer not to visit mid-week.

THERE IS MODEST SATISFACTION, BUT NOT GREAT ENTHUSIASM, ABOUT SERVICES IN THE JASPER TOWNSITE

Respondents who had visited Jasper in the off-season at any time in the past were asked to rate their satisfaction with select services in the Jasper townsite on a number of dimensions. The question asked was, *How satisfied were you with the quality, variety and value for money of activities in the Jasper townsite on your visit/s between October 15 and June 15: Enter a number between 1 and 5, where 1 = "very dissatisfied" and 5 = "very satisfied" for each. 9 = "no opinion".*

Average ratings were calculated for each activity and are shown in Chart 16.

Chart 16: Average satisfaction with activities in the Jasper townsite



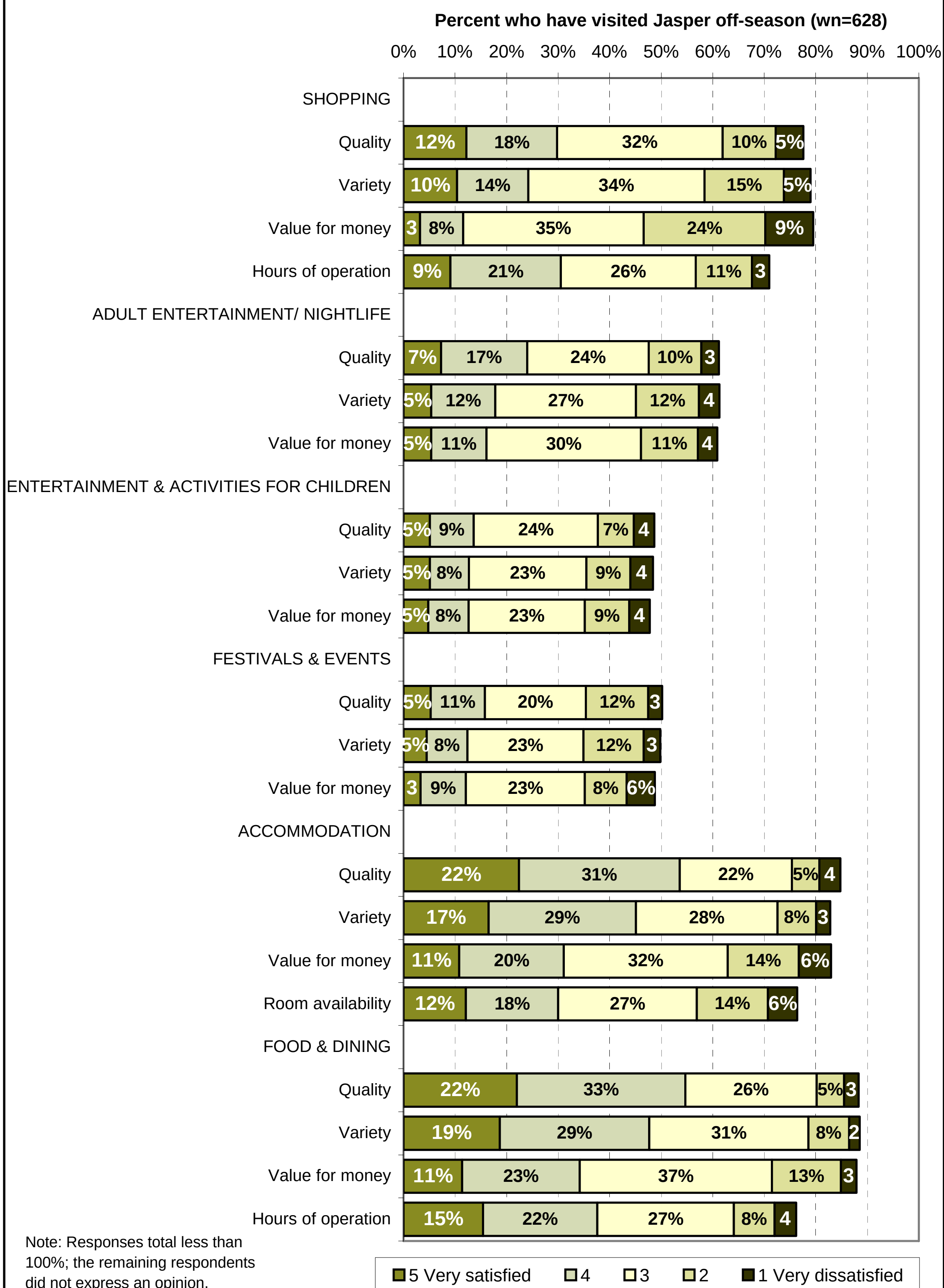
On the whole, the average ratings signalled:

- A modest level of satisfaction with the quality and variety of accommodation and food/dining, as well as restaurant hours of operation. Lower, but still positive average ratings were achieved for value for money for these items and for room availability.
- Neutral scores for the quality, variety and value for money offered by local entertainment – entertainment and nightlife for adults, entertainment and activities for children and festivals and events.
- Shopping quality and hours of operation for shopping received positive scores on average, but value for money in the stores was judged negatively, indicating a fair degree of dissatisfaction.

The distribution of scores is shown in Chart 17. This chart provides additional information:

- Most people were able to comment on accommodation and food and dining items, but many could not do so for the others, especially those concerned with **entertainment**. This suggests low awareness, low participation and/or low interest in such activities. The qualitative research indicated that many people could not recall any entertainment options in Jasper at all … but, for most, it did not matter to them. They were not looking for entertainment in Jasper (they would go to a city for that) and felt that more might actually ruin the experience. For children's entertainment, a response of "no opinion" was understandably higher among Young Adults and Mature/Seniors (about 60% vs. 33% for Families), since they would not be

Chart 17: Satisfaction with activities in the Jasper townsite - distribution of ratings



interested unless entertaining grandchildren, nephews and nieces.

The survey results show an even division of opinion on the entertainment items – scores at the satisfied end of the scale being roughly the same as at the dissatisfied end, with a large proportion at the neutral mid-point. For those with a positive view, bars – especially with live music – partying and drinking were the centre of the adult entertainment scene, while the movie theatre, leisure centre and a variety of activities was associated with entertainment for children. On the other hand, there was little choice for those looking for adult entertainment, especially when compared with Banff, which increased the chance of running into the same people again and again.

Festivals and events were viewed as part of the entertainment scene, with Christmas in November being the best known and most highly regarded and coveted. A few people were aware of Jasper in January – sometimes without recalling its name – but little else was mentioned. This lack of awareness and participation is also reflected in the high level of "no opinion" responses.

- Value for money when **shopping** showed the greatest level of dissatisfaction of any item. Very few provided positive ratings of 5 or 4 here. Goods in the shops were seen as being high end and priced accordingly, or as overpriced.

  Ratings for the shopping factors were predominantly neutral. Based on focus group findings, for many, if not most women (and their accompanying men), shopping was an integral part of the Jasper townsite experience. Some complained that they ran out of shops to visit, that Jasper needs more shops and a greater variety of stores and goods. Among Young Adults, Jasper's shopping paled besides what is offered in Banff, but in the other lifestages this was not necessarily considered a bad thing. On the positive side, visitors enjoyed the concentration of arts-related stores selling sculptures, paintings, carvings and native crafts. This was part of the larger selection of "neat stuff" you don't find elsewhere, including rocks and fossils, homemade jewellery and leather goods.

  On the other hand, some people thought the shops were full of souvenirs and "touristy stuff" that is all the same from store to store. Both points of view are reflected in the ratings for variety of shopping.

- A number of people who otherwise rated shopping and food and dining were unable to score **hours of operation,** suggesting this is not a memorable factor unless it causes inconvenience. In both cases, operating hours were rated fairly positively. However, in the focus groups, this had been a factor on which proprietors were criticised, especially in November when many do not open at all. It gave rise to the impression that Jasper is boring and "dead in November". Restaurant closure at 8 p.m. was also considered too early by some focus group participants, but is not reflected in the survey ratings.

- The quality and variety of **accommodation** and **food and dining** were the highest rated of all Jasper townsite items. About two-thirds of those providing a rating for quality indicated satisfaction, and over half did so for variety.

  Comments about accommodation in the qualitative research pointed to satisfaction with the range of choices, from secluded campsites, to rustic cabins and chalets, to good hotels with facilities like hot tubs and restaurants. Criticism of items such as run down facilities, hard beds or rooms that are standard/run of the mill, may have influenced perceptions of poor value, but Jasper is also perceived by a sizeable number as expensive for all things. Like cost, room availability can be an issue and the ratings reflect this.

Mention of food brought to mind the bakery with its fresh produce in many of the focus groups. While individuals had their favourite places to eat, they viewed the dining scene generally as offering good food (but not out of the ordinary), in nice small restaurants, with a variety of different specialities to choose from (e.g., ethnic, deli, steak). Food and service though could be hit and miss, depending on the season, which influences the number and experience of staff.

Little further insight into the ratings comes from the analysis of **demographic** or **cluster** data. However, some systematic differences were found:

- Women were more satisfied than men with Jasper's festivals and events (quality and variety), food and dining (variety, value and hours of operation) and entertainment for children (value for money).
- Busy Bees proved to be the most satisfied cluster of all, providing above average satisfaction scores for the quality and variety of shopping, adult entertainment, festivals and events and food and dining.
- Warm Weather Friends were the only other cluster to differ from the average, indicating significantly below average satisfaction with the quality of shopping and adult entertainment.

On an ***attitudinal*** and **behavioural** level, there were a few items of interest:

- Those who had a very favourable overall opinion of the Jasper townsite gave higher ratings to the quality of shopping and adult entertainment, suggesting that these services contribute to the image of the townsite.
- High potential spring visitors were distinguished from those with lower potential through their greater satisfaction with the quality and variety of all services other than accommodation. They also rated hours of operation of food service establishments higher.
- Those with a higher potential to visit in all three seasons were more satisfied with the value for money provided by entertainment for children than those less interested in visiting.
- High potential mid-week visitors were distinct for providing higher satisfaction scores for value for money on shopping, adult entertainment, children's entertainment, festivals and events and accommodation. They were also more satisfied with the quality and variety of adult nightlife and entertainment.

Trip planning

Focus group participants reflected on how they would go about planning a trip to Jasper in the off-season.

Competitive destinations that might be considered were usually identified as offering similar scenery, activities and/or atmosphere, sometimes price or distance to travel. They included: Banff, the BC Interior/Okanagan, Kananaskis Country, Canmore, Waterton, Vancouver Island/the BC Coast and, among Saskatoon residents, Northern Saskatchewan. Cities were also mentioned – Edmonton, Calgary and Vancouver. Though they offered a different type of experience (e.g., visiting friends and relatives, an indoor winter trip), their location made them competitive.

A wide variety of responses was given on **when information gathering would occur**. They ranged from not doing anything in advance because it would be a last minute, spur of the moment decision, to periods exceeding six months if the trip was to take place in a busy period like spring break, or when planning a special event like an anniversary trip. The more frequent responses were a few days (1-4), one month to six weeks and two to three months, with less frequent answers of two weeks and four to six months.

By far the most important **source of information** was the internet, with most people saying they would simply Google the destination. A few specifically indicated they would look for the Travel Alberta website or the town or chamber of commerce websites.

Also mentioned frequently was the AMA (Alberta Motor Association) or in Saskatoon the CAA (Canadian Automobile Association), especially when looking for prices.

Other information sources included phoning ahead; from advertisements that catch the eye in a newspaper, magazine or on TV and then following their website links; from a brochure, flyer or leaflet (especially for coupons); or to go to an information centre. It was noticeable that references to mass media influence and visiting an information centre were primarily made in Saskatoon, while Albertans were both proactive and comfortable with the specific websites mentioned.

The **types of information** they would look for included:

- Activities – what to do beside skiing, what is available for children, whether any special events are on.
- To check that information on the website is up to date.
- To find coupons (on the internet especially) or look for package deals.
- To decide where to stay.
- To get maps of various kinds, for example, how to get there or to get around there, trails, topographical maps, to find a place to fish.
- To check road conditions, the weather or snow conditions.
- To learn about the history of Jasper.

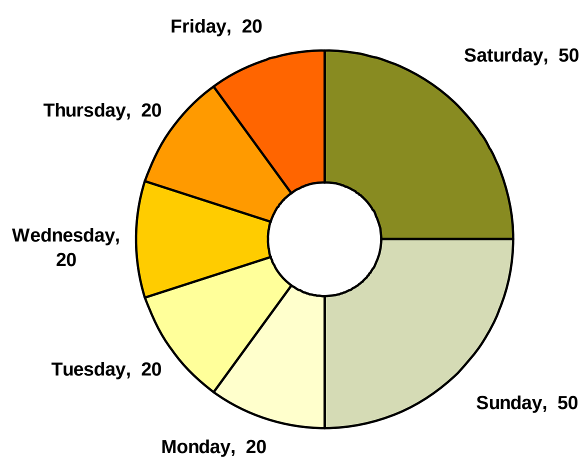
Conclusions and Recommendations

Potential for growth exists

Travel to Jasper in the off-season will not be a mass market phenomenon, but the potential to increase visitation does exist for all seasons. Projections suggest that the number of different regional visitors seen over the last five years could be concentrated over "a couple" of years, with the right approach.

High mid-week potential exists among almost half of those who would be interested in visiting in the next few years but, being spread over a larger number of days, will not have the same impact. Chart 19 demonstrates why this is the case by showing how 100 visitors, each staying two days, would be distributed.

Chart 19: Theoretical distribution of 100 visitors, each staying two days, with half being weekend and half mid-week visitors



To provide an equal distribution for each day would require over 70% of the regional market to visit on weekdays – something that is highly unlikely given commitment to school and work and the proportion prepared to take off mid-week to visit Jasper.

Different target markets require different strategies

GEOGRAPHIC MARKETS

The pre-defined target markets proved to be interesting. The four geographic markets were qualitatively different from one another. This is something that one of the key disincentives to travel to Jasper – distance to the destination – would not have predicted. According to Google Maps, average travel time from Edmonton, Calgary and Grande Prairie to Jasper is very similar (see Table 3), yet the most enthusiastic and loyal visitors are from Grande Prairie, followed closely by Edmonton. Calgary proved to be a distant third and Saskatoon fourth.

Table 3: Travel time to Jasper and Banff by geographic market

From:	To Jasper		To Banff	
	Distance	Travel time	Distance	Travel time
Calgary	402	4:42	128	1:27
Edmonton	375	4:14	420	4:20
Grande Prairie	406	4:55	685	8:20
Saskatoon	893	9:45	728	8:46

Source: Google Maps

The real culprit is the availability and accessibility of competitive locations, which, for both Calgary and Saskatoon, means Banff or the Bow Valley region in Alberta and for Saskatoon the attractions of Northern Saskatchewan. With an equally desirable experience closer to hand, this is likely why an air option will not be a solution to the distance to be covered, given objections to cost and the inconvenience now associated with air travel.

The question is, should Jasper build on its strength in Grande Prairie and Edmonton or attempt to lure essentially new markets[6] out of Calgary and Saskatoon, or both? Since neither of the lagging markets rejects Jasper outright, the answer is one of resources. The cost of overcoming the really important and pervasive barriers of lack of awareness of why to go (or perception that Jasper does not have a draw), combined with the need to substantially increase visibility through word of mouth and paid promotion, will be higher than providing encouragement to visit sooner. The power of chitchat should not be underestimated – and should be harnessed if at all possible; in focus groups in Saskatoon and Calgary, there were people who started out expressing complete disinterest in the Jasper who, by the end of the discussion, were determined to hit the internet to find out more … simply based on what others in the group (who were often not overly enthusiastic either) had to say in response to the questions raised.

The disparity between the geographic markets is highlighted when considering participation in the single over-riding draw to Jasper in the off-season: downhill skiing and snowboarding at Marmot Basin. With the Icefield Parkway now open all year, the potential to attract young skiers from Calgary – who actively seek a variety of different experiences – would appear to be moderately high. Although the distance is a barrier,[7] the biggest challenge to overcome is lack of awareness, as bragging rights (status among peers or image) almost certainly helps drive choice for many skiers. Since other barriers are driving conditions on the Icefield Parkway and, to some degree, negative images of poor snow conditions, the need for last minute promotion of good conditions is evident.

[6] Young Adults who had never visited and older people who were last there 10 or more years ago.
[7] Distance from Calgary to popular ski areas in BC is generally less than 300 km or about a 3½ hour drive.

Lifestage Markets

The second target market was defined by lifestage. **Young Adults** stood out for the very large proportion (three in four) who were skiers/snowboarders, which influenced their high potential to visit in the winter. They were also less concerned about temperatures. This is a market that needs to be continually nurtured, since new entrants emerge every year. One noticeable predisposing factor in Grande Prairie, is the practice of taking school groups to Jasper for a skiing or trail hiking experience. This increases early familiarity with the destination and a sense of knowing it well – both of which are predisposing factors to continued visitation. The potential for more school tours out of the other markets should be explored.

Higher loyalty to Marmot Basin was identified among **Mature/Seniors** and **Families**, providing the potential to encourage more frequent use (and hence visits to Jasper) through a reward system. Appropriately designed, it should also help to make Jasper "feel special" again. The actual incentives would require careful review. Easy financial lures *may* not be the most effective ones, given the relative affluence of Marmot Basin users.

On the whole, the Mature/Seniors group had lower potential to visit in winter, in part because of their lower rate of participation in skiing/snowboarding. The shoulder seasons would be a better fit for them.

All lifestage segments were interested in the experience of travelling to Jasper by train, though for different reasons and with different expectations of what the experience would be like. The potential for the Snow Train to morph into a attraction in itself would appear to be high. It would stimulate interest in Jasper in the off-season by filling a need for something different, providing a new reason to go there.

Attitudes, Interests and Opinions Clusters

Lifestage was associated to some degree with the AIO Clusters identified by the survey. However, these added considerable new information of value for marketing, and appear to be a more useful way to view the market. Three clusters, making up 38% of the residents of the regional market, offer strong opportunities for off-season travel, while a fourth, which is the largest of all clusters at 29%, is of interest too. These clusters were found in all geographic markets to about the same degree.

Young Adventurers, who make up 13% of the target regional population, appear to be the backbone of off-season visitors, particularly in winter and to a lesser degree, in the fall. The vast majority are skiers/snowboarders, but their interest in all challenging (and death-defying) outdoor activities presents an opportunity for cross-promotion to bring them back to Jasper more often and in the shoulder seasons. They expressed a relatively high level of interest in tobogganing, backcountry ski touring and ice skating, also backcountry backpacking, canoeing, kayaking or rowing, river or whitewater rafting, mountain biking, and ice climbing, trail hiking, sitting by a bonfire and camping, as well as in trail rides. This cluster is closest to a stereotypical view of Jasper for rugged outdoor adventure. The biggest challenge for these predominantly young men is getting away from school/work, so they will likely remain concentrated as weekend visitors.

Young Adventurers are complemented by the **Winter Fun** cluster as current and high potential winter visitors. Winter Fun members make up 11% of the target regional market. Their interests are focused on skiing/snowboarding, supplemented by other snow activities (ice skating, tobogganing and backcountry ski touring), and they need things to do when not skiing. Après ski opportunities to relax and rejuvenate, such as sitting in a hot tub or swimming in a pool, or going to a movie theatre (and, one would imagine, a bar or other form of entertainment for adults and children) were important to this cluster. As predominantly younger people in the Families and Young Adults lifestages, they easily fit the image of young skiers having a good time. The opportunity in this group is to ensure a well-rounded experience, rather than one just focused on skiing/boarding, and to encourage greater loyalty to the destination.

The **Busy Bees** cluster comprises 14% of the target regional market. Its members were especially interested in Jasper in the spring, and, to a lesser degree, in winter. They also had an above average interest in mid-week travel. Busy Bees were the most satisfied of all clusters with their past trip experiences. Cluster members were underrepresented among Mature/Seniors and included an above average number of Families, which may help to explain their energetic interest in anything and everything Jasper has to offer. They were strongly motivated by nature, but were as comfortable with natural outdoor attractions (including both the more physically challenging outdoor activities and Jasper's sights) as they were with built attractions. Where they were distinctive was for their interest in educational opportunities (wildlife watching, a museum/exhibit, an information centre, an interpreter or guide) and things for children to do – swimming pool, recreation centre, playground, a movie theatre. The entrée to this cluster would appear to be through their children … that Jasper has plenty to do and lots of opportunities to experience and learn about the great outdoors.

The **Sedentary Pleasures** cluster, with a majority of Mature/Seniors, would be a challenge to attract in the winter because they tend not to be skiers/snowboarders or rugged outdoor types. They may be of interest in the shoulder seasons when the weather would allow participation in the activities that do draw them. Since they make up 29% of the target population, they need to be considered for their sheer numbers alone. Cluster members enjoy sedentary sightseeing activities and are attracted by historic features. For example, they like wandering around the quaint townsite and enjoying its sense of history, visiting a museum/exhibit, the Jasper Heritage Railway Station or an information centre. This cluster would respond well to the appeal of an authentic and historic Canadian experience. They also want to go sightseeing by car and view wildlife, fall colours and the various natural attractions in the Park; and take a scenic lake cruise, the Jasper Tramway or go on a horse drawn wagon ride. They are attracted by the idea of sitting by a fireplace indoors and swimming in a pool. Since they were not above average in choosing such barriers as cold or overexposure to the destination, the challenge with this cluster is to tell the right story to move them into high potential mode. They already know that there are a lot of activities of interest to them, so they need to be convinced to visit in the shoulder season rather than the summer; however, no such trigger emerged in the survey itself.

One of the remaining two clusters, **Warm Weather Friends**, offers a little potential for the spring and possibly the fall – weather permitting. Warm Weather Friends is a high income cluster with an above average number of Families that makes up 16% of the target population. Their desire is to be in the great wide outdoors, and their intent is to have a camping holiday. Activities of particular interest are camping, hiking, fishing and wildlife watching, while indoor or built attractions like the townsite, an indoor fireplace, a festival/event, leisure centre or winter snow and ice activities are below average interest. They were also less satisfied with previous experiences visiting the Jasper townsite in the off-season.

The final cluster, as their name implies, is **Out of Their Element** in Jasper. Making up 17% of the target population, they are low potential visitors in all three seasons and mid-week. Their overall opinions of the destination are less favourable because such defining elements of the destination as the rugged outdoors, wildlife watching and natural scenery are of less than average importance to them. Few activities and attractions in Jasper are a draw, so as a result, they do not have a reason to visit or enough to do; they also find the townsite boring. The only items with any potential are golfing and the JPL, but even these had only lukewarm appeal.

MID-WEEK VISITORS

High potential mid-week visitors were influenced more by past positive experiences, higher interest in off-season travel and above average familiarity with, and favourability of overall attitudes to the destination, than geographic, demographic or AIO groups. The higher potential mid-week visitor ranked being able to escape and relax, watch spring arrive, and the opportunity to learn as relatively more important as reasons to visit Jasper – and expressed greater satisfaction than average with their previous trips on opportunities to learn, along with shopping and entertainment. This suggests that opportunities for learning and education may be a lure to draw mid-week visitors, but the connection is not as sharply delineated as for the AIO Clusters, leaving some uncertainty about the relationship.

Key messages that are not market specific

The above discussion of target markets includes a profile of the tailored appeals that would influence each segment. However, there are a number of reasons to visit Jasper that are of general importance, and a number of barriers that may need to be addressed, as they form a backdrop to all potential promotion.

Reasons to visit

The nature and major appeal of the destination is captured by attributes which generate a high level of agreement in all or most target groups. These do not discriminate between high potential visitors and those who are not – that is what information on the target markets does – but are important in helping to profile the destination appeal in general. As such, they should to be included in promotions almost regardless of who is being marketed to. There were two such attributes:

- Natural scenic beauty; and
- A place to escape the rigours of urban life and relax in a calm, peaceful environment.

Disincentives and barriers

There were also some widely perceived disincentives to visiting, real or otherwise. These would benefit from messaging that helps to mitigate their impact or overcome the deterrent. Those agreed to by a majority of the population were:

- The long drive to Jasper
- High costs at the destination
- Difficulty in getting away in the off-season (e.g., because of school or work)
- Crowding on long weekends or school holiday periods
- Road conditions

The really important barriers though, were:

- A lack of visibility for Jasper in Calgary and Saskatoon (discussed earlier)
- A lack of knowledge of why one should go there (or belief that there is no major draw)
- Perceptions of cold temperatures/weather

Not knowing why to visit Jasper was closely tied to having things to see and/or do there – in other words, to activities that would interest *the individual*. For the major portion of the potential market, these did not include downhill skiing, which currently dominates the image of Jasper in the off-season, or other physically challenging sports. This need, in turn, emphasizes the importance of providing information, in an enticing way, that relates to the specific cluster of activities that will attract each market segment.

The importance of cold temperatures as a barrier to visiting was underlined by choice of: sitting in a hot tub, by an indoor fireplace, an outdoor bonfire, or visiting Miette Hotsprings among the very top activities in Jasper. Survey participants pointed to the solutions … these need to be communicated. It will also be important to ensure that pictures and other graphic elements in promotional materials play up warmth (e.g., cozy scenes and warm tones) rather than coolness.

Increasing the exposure of the destination and overcoming these barriers will be important to realizing the market potential identified in the survey. Taking advantage of the unique perspectives provided by the AIO Clusters will be just as important if the image of the destination in the off-season is to be diversified and expanded.

INFACT RESEARCH AND CONSULTING INC.

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Appendix I:

Sample Description

Sample response and incidence rates

A total of 29,672 invitations to participate were sent out, with responses being received from 3,467 panel members, for an average response rate of 12%.

The mailout sample used by OpenVenue was selected to represent all facets of the lifestage segments, based on information in their database. GMI and GO provided a sample selected only by age, which resulted in more of their panel members being screened out.

2,603 of those who responded did not meet the sample criteria, 104 were rejected as the quotas were full and 760 completed the survey. The total incidence rate was 22%. Due to the finer targeting by Openvenue, as well as response blocking from duplicate listings between panels, OpenVenue's incidence rate was 28%, compared to 14% from the two other panels.

In all, 3,363 panel members were fully screened online. Respondent distribution was as follows:

Disqualified	%
You or an immediate family member work in the travel and tourism industry, mass media, an advertising agency or market research company[1]	1
Have not travelled overnight for pleasure in the past three years[2]	14
No main destinations were chosen purely for pleasure (selection was driven by business or VFR)	34
No longer in correct age group	5
Not in geographic market (defined by postal code)	11
Young Adult disqualification (e.g., have children in household, a household member was aged 35 or older)	7
Family disqualification (e.g., no children under 15 years, single parent household)	5
Qualified and complete	**23**

[1] This screening criterion was discontinued early in the survey. The change increased the proportion eligible by about 5%.
[2] This screening criterion was changed from 18 months early in the survey. The change increased the proportion eligible by no more than 2%.

Unweighted and weighted sample profiles

The table below profiles the achieved or unweighted sample, and the final weighted distribution. The weighted sample is the same as the estimated target population distribution in each geographic market, based on data published by Statistics Canada for Census 2001, supplemented with information from survey sources.

Profile of the unweighted and weighted sample

	Achieved sample (unweighted) %	Weighted sample %
Edmonton		
Young Adults	32	25
Families	37	26
Mature/Seniors	31	49
Males	46	50
Females	54	50
Calgary		
Young Adults	28	27
Families	36	29
Mature/Seniors	36	44
Males	50	50
Females	50	50
Grande Prairie		
Young Adults	40	31
Families	38	38
Mature/Seniors	22	31
Males	27	50
Females	73	50
Saskatoon		
Young Adults	42	27
Families	28	26
Mature/Seniors	30	47
Males	40	50
Females	60	50

Appendix II:

Questionnaire

1. Do you or any members of your immediate family work for any of the following types of organizations:
   Answer yes or no for each one

	Yes	No
A market research firm	O	O
A newspaper, radio or TV station	O	O
An advertising agency	O	O
The travel and tourism industry	O	O

2. In the past three years, that is, since March 2004, have you taken a pleasure or leisure trip, or a vacation, where you stayed away from home for at least one night?

   O Yes **Continue**
   O No **TERMINATE**
   O Don't remember **TERMINATE**

3. Which of the following describes how the <u>main destination/s</u> on the trips you took <u>in the past 18 months</u> were chosen?

   FYI:
   Corporate business includes travel to work, to attend a business meeting, conference/seminar or similar.
   *Personal business would be something like seeing a doctor or lawyer, taking a child to university, or **participating** in a sports tournament, etc.*
   Visiting friends and relatives includes things like visiting parents, grandchildren or other relatives, family reunions, weddings, graduations, etc.

   O All <u>main</u> destinations were chosen to visit friends or relatives, or for corporate or personal business **TERMINATE**
   O Some or all <u>main</u> destinations were chosen purely for pleasure **Continue**

4. What is your postal code?

   ☐☐☐ ☐☐☐

VALIDATE AGAINST LIST PROVIDED IN EXCEL SPREADSHEET AND CATEGORIZE AS EDMONTON, CALGARY, GRANDE PRAIRIE OR SASKATOON (TERMINATE IF NOT ON THE LIST)

5. Which age category do you fit in:

Less than 18 **TERMINATE**
18-29 **IF GRANDE PRAIRIE GO TO Q6a, FOR OTHERS TO Q6d**
30-34 **GO TO Q7a**
35-44 **GO TO Q8a**
45-54 **TERMINATE**
55-74 **GO TO Q9** **(=Mature/Senior segment)**
75+ **TERMINATE**

<u>18-29:</u>

6. a. Which of the following most closely describes your household? **(Ask in <u>Grande Prairie</u>)**

- ○ One person **SKIP TO Q9** **(=Young adult segment)**
- ○ A couple **SKIP TO Q6e**
- ○ A family **GO TO Q6b**
- ○ A group of adults (e.g., two or more relatives or friends) without children up to 17 years in the household **SKIP TO Q6e**
- ○ A group of adults (e.g., two or more relatives or friends) with children up to 17 years in the household **TERMINATE**

6. b. Do you live: **(Grande Prairie)**

- ○ With your parents **GO TO Q6c**
- ○ In your own household **TERMINATE**

6. c. Do you personally have an annual income from employment of: **(Grande Prairie)**

- ○ Up to $20,000 **TERMINATE**
- ○ Over $20,000 **SKIP TO Q9** **(=Young adult segment)**
- ○ Not employed **TERMINATE**

6. d. Which of the following most closely describes your household? **(Ask in o<u>ther centres</u>)**

- ○ One person **SKIP TO Q9** **(=Young adult segment)**
- ○ A couple **GO TO Q6e**
- ○ A group of adults (e.g., two or more relatives or friends) without children up to 17 years in the household **GO TO Q6e**
- ○ A household with children up to 17 years **TERMINATE**

6. e. Is anyone in your household aged 35 years or older? **(<u>GP and Other-except GP living with parents</u>)**

- ○ Yes **TERMINATE**
- ○ No **SKIP TO Q9** **(=Young adult segment)**

30-34:

7. a. Which of the following most closely describes your household?

- One person **SKIP TO Q9** **(=Young adult segment)**
- A couple **SKIP TO Q7c**
- A two-parent family with children at home **GO TO Q7b**
- A single-parent family with children at home **TERMINATE**
- A group of adults (e.g., two or more relatives or friends) without children up to 17 years in the household **SKIP TO Q7c**
- A group of adults (e.g., two or more relatives or friends) with children up to 17 years in the household **TERMINATE**

7. b. Are any of these children 14 years old or younger?

- Yes **SKIP TO Q9** **(=Family segment)**
- No **TERMINATE**

7. c. Is anyone in your household aged 35 years or older?

- Yes **TERMINATE**
- No **SKIP TO Q9** **(=Young adult)**

35-44:

8. Which of the following most closely describes your household?

- A two-parent family with children at home **GO TO Q8b**
- A single-parent family with children at home **TERMINATE**
- A group of adults (e.g., two or more relatives or friends) with children in the household **TERMINATE**
- A household without children up to 17 years **TERMINATE**

8. b. Are any of these children 14 years old or younger?

- Yes **SKIP TO Q9** **(=Family segment)**
- No **TERMINATE**

INTRODUCTION

This survey is about Jasper National Park and the Jasper townsite as places to visit on a pleasure trip, where you are away from home for at least one night, between mid-October and mid-June. The first few questions ask about them separately, the rest combine them under the term "Jasper".

9. How familiar are you with each area as a pleasure travel destination between October 15 and June 15:

	Know a lot about it	Know something about it	Know a little about it	Heard of, but know nothing about it	Never heard of it
a. Jasper National Park	○	○	○	○	○
b. Jasper townsite	○	○	○	○	○

IF NEVER HEARD OF BOTH: SKIP TO Q23
DO NOT SHOW DESTINATION IN Q10 IF SAID NEVER HEARD OF IT IN Q9

10. What is your opinion of each area as a pleasure travel destination between October 15 and June 15:

	Very favourable	Somewhat favourable	Neither favourable nor unfavourable	Somewhat unfavourable	Very unfavourable	No opinion
a. Jasper National Park	○	○	○	○	○	○
b. Jasper townsite	○	○	○	○	○	○

11. What would be the most important reasons for you to visit Jasper between October 15 and June 15. *Please number the top 5 in order from 1 (most important) to 5 (5th most important)*. ROTATE ORDER

- ☐ A good place to learn things
- ☐ In the spring to see melting streams and lakes, budding leaves, and flowers starting to bloom
- ☐ Low rates, good deals and discounts
- ☐ The people are fun, interesting and knowledgeable
- ☐ The rugged outdoors feel
- ☐ The weather is good for what I want to do
- ☐ Quiet, no crowds, few cars, easy to get accommodation, short lineups
- ☐ To enjoy the natural scenery – lakes, rivers, waterfalls, glaciers, trees and snow on the mountains
- ☐ To take visiting out of town friends and family
- ☐ There are lots of activities that interest me
- ☐ It's safe
- ☐ To enjoy the quaint townsite and its well preserved feeling of history and authenticity
- ☐ To escape and relax in a peaceful, tranquil environment
- ☐ To see the leaves when they change colour in the fall
- ☐ To attend festivals and/or events
- ☐ To ski or snowboard
- ☐ To see and watch wildlife

12. What are the biggest barriers for you to visit Jasper between October 15 and June 15. *Please number the top 5 in order from 1 (most important barrier) to 5 (5th most important barrier)*. ROTATE ORDER

- ☐ Road conditions typically make it a difficult drive to get there
- ☐ Boring, dead, lacks a feeling of energy
- ☐ It is too crowded on long weekends, Christmas, Easter or Spring breaks
- ☐ It's too cold
- ☐ I've been there so often it no longer feels special
- ☐ Long drive to get there
- ☐ Not enough snow
- ☐ There is not enough for me to see and do there
- ☐ Townsite is too small, old, tired, unwelcoming
- ☐ It's hard to get away (e.g., because of school or work)
- ☐ I don't know a reason to go there; there is no major draw
- ☐ You don't hear about it much; it's not well promoted
- ☐ It's expensive, rates are high, no deals or discounts
- ☐ It lacks history and culture

13. Which of the following would you be interested in experiencing in Jasper between October 15 and June 15: *Select all that apply* ROTATE ORDER

- ○ An interpreter or guide
- ○ Backcountry backpacking
- ○ Backcountry ski touring
- ○ Camping (in a campground)
- ○ Canoeing, kayaking or rowing
- ○ Cross-country skiing
- ○ Downhill skiing
- ○ Fishing
- ○ Golfing
- ○ Hiking on a trail
- ○ Horse drawn sleigh/ wagon ride
- ○ Ice climbing
- ○ Ice skating
- ○ Ice walk
- ○ Information centre
- ○ Leisure/ recreation centre
- ○ Mountain biking
- ○ Movie theatre
- ○ Museum/ exhibit
- ○ Photography
- ○ Playground
- ○ Relaxing and rejuvenating
- ○ River/ whitewater rafting
- ○ Scenic lake cruise
- ○ Sightseeing by car
- ○ Sitting by a bonfire (outdoors)
- ○ Sitting by a fireplace (indoors)
- ○ Sitting in a hot tub
- ○ Snowboarding
- ○ Snowshoeing
- ○ Swimming in a pool
- ○ Tobogganing
- ○ Trail riding
- ○ Watching wildlife
- ○ None of the above

14. Which of the following would you be interested in visiting in Jasper between October 15 and June 15: *Select all that apply* ROTATE ORDER

- O Athabasca Falls
- O Columbia Icefields
- O Jasper Heritage Railway Station
- O Jasper Park Lodge
- O Jasper Tramway
- O Lakes Annette, Edith and/or Beauvert
- O Maligne Canyon
- O Maligne Lake
- O Miette Hotsprings
- O Mount Edith Cavell and Angel Glacier
- O Patricia and/or Pyramid Lake
- O Sunwapta Falls
- O None of the above

15. What are the chances that you will visit Jasper in the next couple of years in these three time periods:

	No chance or almost no chance 0	Very slight possibility 1	Slight possibility 2	Some possibility 3	Fair possibility 4	Fairly good possibility 5	Good possibility 6	Probable 7	Very probable 8	Almost sure 9	Certain or practically certain 10
Fall: October 15 – November 30	O	O	O	O	O	O	O	O	O	O	O
Winter: December 1 – March 31	O	O	O	O	O	O	O	O	O	O	O
Spring: April 1 – June 15	O	O	O	O	O	O	O	O	O	O	O

16. **FAMILY:** What are the chances that you would take your children out of school to visit Jasper on a mid-week trip (lasting 2 or more days between Monday and Friday), between October 15 and June 15:

16. **YOUNG ADULTS AND MATURE/SENIORS:** What are the chances that you would take a mid-week trip (lasting 2 or more days between Monday and Friday) to Jasper between October 15 and June 15:

17. a. What are the chances that you would take a trip to Jasper between October 15 and June 15 by plane, flying into Hinton airport from your city, and then taking a shuttle bus or rental car to Jasper:

17. b. What are the chances you would fly to Hinton between October 15 and June 15, as part of a package that also included such things as transportation from Hinton to Jasper, accommodation and an activity (e.g., skiing or a guided tour, etc.), with details organized to meet your needs:

18. a. What are the chances that you would take a trip to Jasper between October 15 and June 15 by train, in a Panorama viewing car, from Edmonton?

18. b. What are the chances that you would take a Panorama viewing train to Jasper from Edmonton between October 15 and June 15, as part of a package that also included such things as accommodation and an activity (e.g., skiing or a guided tour, etc.), with details organized to meet your needs:

19. When last did you visit Jasper (National Park and/or townsite) for pleasure in the following three time periods:

	In the past year or so (2006-2007)	Over one to five years ago (2002-2005)	Over five to ten years ago (1997-2001)	Over ten to twenty years ago (1987-1996)	Over 20 years ago (1986 or before)	Never	Not sure
Fall: October 15 – November 30	○	○	○	○	○	○	○
Winter: December 1 – March 31	○	○	○	○	○	○	○
Spring: April 1 – June 15	○	○	○	○	○	○	○

IF ALL= "NEVER" OR "NOT SURE" SKIP TO Q23

20. How satisfied were you with the quality, variety and value for money of activities in the Jasper townsite on your visit/s <u>between October 15 and June 15</u>: *Enter a number between 1 and 5, where 1 = "very dissatisfied" and 5 = "very satisfied" for each. 9 = "no opinion".*

	Quality	**Variety**	**Value for money**	**Other**	
Shopping	☐	☐	☐	Hours of operation	☐
Entertainment and nightlife for adults	☐	☐	☐		
FAMILY ONLY: Entertainment and activities for children	☐	☐	☐		
Festivals and events	☐	☐	☐		
Accommodation	☐	☐	☐	Room availability	☐
Food and dining	☐	☐	☐	Hours of operation	☐

21. How satisfied were you with the quality, variety and "busyness" (or number of people there) of attractions and activities in Jasper National Park on your visit/s between October 15 and June 15: *Enter a number between 1 and 5, where 1 = "very dissatisfied" and 5 = "very satisfied" for each. 9 = "no opinion".*

	Quality	Variety	Busyness	Other	
Walking, hiking, biking or cross-country ski trails	☐	☐	☐	Trail signage	☐
Skiing or snowboarding at Marmot Basin	☐	☐	☐	Snow conditions	☐
Natural attractions (mountains, glaciers, waterfalls, lakes, etc.)	☐	☐	☐		
Learning opportunities (e.g., about history, nature, wildlife, etc.)	☐	☐			
Campgrounds	☐	☐	☐	Site availability	☐

22. Where have you gone on the last five occasions that you did downhill skiing or snowboarding? *Please ensure sum adds to 5 (or check additional buttons)*

	Number of times
Jasper: Marmot Basin	☐
Banff: Lake Louise, Mt. Norquay or Sunshine	☐
Kananaskis: Fortress, Nakiska	☐
Edmonton or Calgary: Canada Olympic Park, Edmonton Ski Club, Rabbit Hill, Snow Valley, Sunridge	☐
Other Alberta: Canyon, Castle Mountain, Long Lake, Silver Summit etc.	☐
B.C. Interior: Big White, Fairmont, Fernie, Kimberley, Panorama, Powder King, etc.	☐
B.C. Coast: Mt. Washington, Whistler Blackcomb, etc.	☐
Saskatchewan: Duck Mountain, Table Mountain, etc.	☐
Other Canada	☐
United States	☐
Skied/boarded fewer than 5 times	○
Not applicable – don't ski or snowboard	○

Q23. Are you:

- Male
- Female

24. a. Was your TOTAL household income in 2006, before taxes and other deductions:

- Up to $80,000 **GO TO Q24b**
- Over $80,000 **GO TO Q24c**

24. b. Was your TOTAL household income in 2006, before taxes and other deductions:

- Up to $50,000
- Over $50,000

24. c. Was your TOTAL household income in 2006, before taxes and other deductions:

- Up to $120,000
- Over $120,000

Appendix III:

Snow Train poster


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