infact Research and Consulting Inc.

Potential Demand for Rural Vacation Experiences in Alberta by Residents of Alberta

Quantitative Research

Alberta Tourism, Parks and Recreation

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INFORMATION ▪ PLANNING ▪ EVALUATION

Executive summary

Introduction

The potential of urban Albertans to participate in rural vacation experiences in the province was explored quantitatively in this study. It builds on the understanding of the market gained through qualitative research conducted in 2012. The results were intended to help define target markets, inform product and experience development and identify communication needs.

Target markets, their current travel patterns, overall perceptions of rural Alberta as a leisure trip destination and travel needs were explored in three different ways:

- Geographically, for select urban areas within the Calgary region, Edmonton region, Southern Alberta, Central Alberta and Northern Alberta;[1]
- Demographically, by household lifestage, for young adult-only households, family households and older adult-only households; and
- By nine Explorer Quotient (EQ) segments and four groups.

A survey was conducted with 2,391 online panel members who had taken a discretionary leisure trip in the past two years. The data were weighted to provide an equal "voice" to Calgary, Edmonton and urban locations in Southern, Central and Northern Alberta. Furthermore, within each of these three regions, the three household lifestages and genders were also weighted equally. This prevented the needs or opinions of larger regions or groups from overwhelming smaller ones.

Rural Alberta

In the absence of another suitable yet concise term, the words "rural" and "rural Alberta" are used in the report when describing the study region. The official study definition was, "a same-day out-of-town leisure trip at least 40 km away from home (one-way) in a non-urban location, or an overnight stay

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1. Residents of areas outside the Edmonton and Calgary regions are referred to as living in Northern Alberta, Central Alberta or Southern Alberta. Their location was determined by the location of the city they live in.

away from home in a non-urban area of Alberta (with no minimum distance requirement), but not in Banff or Jasper National Park". Neither "non-urban" nor "rural" were used in the questionnaire as the qualitative research demonstrated that understanding of the terms varied from person to person and, for a few, had negative connotations.

FAMILIARITY, FAVOURABILITY AND CHANCE OF VISITING

Very few Albertans had not heard of "Alberta locations outside the larger cities and Banff/Jasper National Parks as a place to visit on a leisure trip" (5%). The largest proportions said they knew 'something' (48%) or 'a little' about them (27%), leaving room for further knowledge growth, as only 18% indicated they knew 'a lot'.

General impressions of rural Alberta as a destination were positive (80%, with about half each having a 'very' or 'somewhat' favourable opinion) while almost all the remainder were neutral (15%). A link between knowledge and impressions of rural Alberta was found. The greater the knowledge, the more favourable the impression tended to be; those with unfavourable impressions had little knowledge to base their opinion on.

Two-thirds of all respondents indicated that they had a chance of visiting a rural Alberta location in the next two years. This represents the maximum potential market for rural Alberta under current levels of familiarity and favourability. Almost one-third were 'certain or practically certain' or 'almost sure' they would take such a trip (also rated 9-10/10), providing a conservative estimate of market potential. Six months before the peak summer season, 16% of those with a chance of visiting were at a stage in the buy cycle where they were actively planning or booking this trip.

PAST TRAVEL

In the past two years, the vast majority of respondents had taken both overnight (i.e., lasting one or more nights) and same-day trips away from home (98% and 92% respectively), trips for pleasure, vacation or holiday and to visit friends or relatives (87% and 79%) and trips with a destination in Alberta (80%).

Among Alberta visitors, 42% had visited rural Alberta, compared to Banff/Jasper National Parks, the City of Calgary, the City of Edmonton and a group of other major urban centres at 59%, 57%, 53% and 39% respectively.

Based on the total sample, 34% had visited rural Alberta. Current market size therefore falls at the conservative estimate, with potential to double the number of urban Albertans who visit (i.e., from 34% to 67% with a chance of visiting).

Regional travel within rural Alberta

Among the urban Albertans who had travelled within rural Alberta in the past two years, Alberta Central and Alberta South had been visited by many more than Alberta North (by 62%, 57% and 9% of travellers respectively).[2]

The key determinant of this distribution was region of residence. 80% or more visited their own or their surrounding rural region: Calgary region residents visited adjacent Alberta South, Edmonton region residents had visited surrounding Alberta Central, Central Alberta residents visited Alberta Central and Southern Albertans visited Alberta South. Only Northern Albertans visited another region more often (Alberta Central 70%). While there was "cross-boundary" visitation from all regions, it occurred at a far lower rate, generally depending on distance from home.

However, there is an unfulfilled desire to cross those boundaries. The ideal rural trip, whether same-day or overnight, was far more likely to have a destination in Alberta South (especially from Calgary for same-day trips and, for overnight trips, from Edmonton and Central Alberta) and far less likely to take place in Alberta Central. Alberta North also attracted much greater interest than suggested by current travel (especially from Calgary on overnight trips and among Northern Albertans on same-day trips), but still well below the other two regions.

Locations as attractors

Hundreds of different rural locations had been visited in the past two years and even more were selected as ideal locations to visit. This means that rural travel is – and will continue to be – widely dispersed. It also means that few locations have the pulling power of a major attraction. The more popular destinations were Drumheller and Canmore (visited by between 10% and 19% of rural Alberta visitors over two years), followed by Waterton, Camrose and Sylvan Lake (visited by between 5% and 9%). Each of these attracted a fair proportion of cross-boundary travellers, as did Drayton Valley and Whitecourt.

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2. Visitors to a rural region are described as visitors to Alberta North, Alberta Central and Alberta South. As regional boundaries were under review at the time this study was conducted, county lines and other geo-physical characteristics used by Statistics Canada to define the previous Tourism Destination Regions were used as a guide for this study.

Potential growth was identified for Drumheller on same-day trips (reaching 20% to 29%) and for Waterton and Camrose on overnight trips (reaching 10% to 19%). Pent up demand also appears to exist for Kananaskis and Sylvan Lake as main destinations on a rural trip, along with Elk Island and Crowsnest Pass.

Additional locations that functioned primarily as regional draws were:

- The Crowsnest Pass and Pincher Creek area in Alberta South (currently visited and the Crowsnest Pass for ideal same-day trips), plus Writing-on-Stone Provincial Park, Brooks and Milk River for ideal day trips. Other Alberta South ideal locations of note included: Fort Macleod, Head-Smashed-In Buffalo Jump, Frank Slide, Cardston and Cypress Hills; High River, Black Diamond, Turner Valley and Millarville near Calgary; Nanton, Vulcan and Claresholm; also Kananaskis and Cochrane, often associated with Canmore trips.
- Vegreville, Rocky Mountain House and Lacombe in Alberta Central (currently visited, with Rocky Mountain House also being chosen for ideal same-day and overnight trips), plus Stettler, Ponoka, Wetaskiwin and Olds for an ideal same-day trip and St. Albert for an overnight trip. Other locations of interest in Alberta Central were: "The Badlands", Royal Tyrrell Museum and Dinosaur Provincial Park (often in association with Drumheller); Elk Island National Park and the Ukrainian Cultural Heritage Village near Edmonton; the Reynolds Museum and Leduc.
- Grande Cache in Alberta North (currently visited and chosen for ideal trips), plus Two Lakes Provincial Park, Kakwa Wildland Park, Sturgeon Lake and Beaverlodge on ideal same-day trips and Slave Lake on an ideal overnight trip. "Northern Alberta" was sometimes viewed as a destination without necessarily identifying places to go within the region.

Approximately 800 trips that included a location in rural Alberta in the past two years were profiled, as were approximately 1,100 ideal same-day and ideal overnight trips with named rural locations. Most actual trips had one destination only (56%), with even more choosing one destination on an ideal same-day or overnight trip (66% and 62% respectively).

When multiple rural locations were visited on the trip, they tended to be near one another, either along a major route or in a cluster. However, where more than one location was visited, leakage to nearby large urban centres, Banff/Jasper National Parks and out of province destinations like British Columbia and Montana, was also found.

TRIP CHARACTERISTICS

Rural travel peaked in the summer months (22% each in July and August) and was rare from January to May (1% to 4%). Month of visit chosen for the ideal trip, based on approximately 1,950 responses,[3] varied somewhat from the actual distribution, with greater potential being identified for winter travel. There also appeared to be a tendency to prefer overnight travel in summer and same-day travel in the shoulder months, especially May and June.

The most popular length of stay category on the profiled trip taken in the last two years was two to six nights (43%), followed by same-day trips (36%). 14% took a trip lasting one night and only 7% stayed longer than a week. On the ideal overnight trip the distribution was similar.

In contrast, there were differences in the type of accommodation actually used and the types that would be preferred. 38% stayed at the home of a friend or relative, but only 25% would choose to do so. Moderately priced hotels/motels and campgrounds were by far the most popular picks for commercial accommodation. Factor analysis of accommodation demand led to the identification of seven accommodation preference groups as follows:

- Moderately priced hotels/motels (24%)
- Budget accommodation, particularly campgrounds and back country camping, then budget hotels (23%)
- VFR home (16%)[4]
- High end accommodation – resorts, luxury hotels and spas (14%)
- Outdoor activity-centred experiences, including hunting or fishing lodges/camps/outposts, wilderness lodges, platform/yurt camping and a farm/guest ranch (10%)
- Self-contained (including kitchen or food) – rented cottage/cabin, cottage/cabin/vacation home owned by the respondent or someone they knew, rented condo/suite/apartment hotel with kitchen, Bed & Breakfast (B&B), motorized recreational vehicle, farm/guest ranch (10%)
- Low end – a hostel/dormitory/college/university residence or roadside/pullout/parking lot (3%)

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3. All trip characteristics profiles are based on responses with a named location plus responses indicating they 'did not know' where they would go on the ideal trip.

4. VFR=Visiting Friends and Relatives

Virtually no one (4%) had used a travel package, special deal, coupon or discount on the profiled trip. There was a major gap between what actually happened and what is wanted. About two-thirds of respondents indicated they would use a financial incentive on a rural trip, with accommodation, food & beverages being the top two needs. Next were recreation & entertainment coupons or deals, followed by shopping discounts.

Many more activities were chosen for the ideal trips than were actually done on the profiled trip, suggesting that there is an opportunity to draw in more visitors, more often, to experience what the rural Alberta has to offer.

Five of the seven niche product areas identified by Alberta Tourism, Parks and Recreation (ATPR) appear to have the potential to address significantly increased demand: special attractions and tours, culture and heritage tourism, trail development, ag/culinary tourism and festivals and events. Of these, festivals and events would involve the greatest change over current travel behaviour.

A look at the top 15 activities by rank order showed that on the ideal trip there would be less emphasis on VFR and touring back country roads than at present. There would be more emphasis on visiting national or provincial parks; seeing natural wonders, wildlife or scenic views; walking/running; swimming; and sightseeing on a circle route, driving from one place to another or along an historic trail. Visits to historical sites, museums or interpretive centres and dining out at a notable local or home town restaurant were also ranked higher on the ideal trips.

Ideal same-day trips placed greater emphasis on entertainment options of various types, pointing to a need to include at least one key attraction on their busy day. Same-day top 15 activities included: visiting large roadside statues or other quirky attractions; visits to a theme or amusement park, zoo aquarium or botanic garden; attending a music festival, event or concert; strolling the streets of a small town and browsing; or shopping for local food/visiting a food producer.

Ideal overnight trips placed greater emphasis on relaxing; perhaps by being near a lake, reservoir, river or stream; and camping. This tied in with the inclusion of hiking/backpacking and northern lights viewing or stargazing on the overnight top 15 list.

IMPROVEMENT PRIORITIES

All respondents were shown a list of nine unmet visitor needs identified in the qualitative research study, together with the seven niche product areas. They were asked to rank the top four in order of importance with the instruction, "Please choose features that would make you want to travel more often or stay longer".

- Accommodation was ranked first overall. Other top choices were: ensuring there are enough fun experiences; improvements to roads; and improvements to advertising, promotion and information.
- They were followed by culinary experiences; service quality; festivals and events; and updating existing attractions.
- The third group included arts and cultural attractions; trail development; reservations/ booking ahead; roadside rest areas; and connectivity.
- Chosen least often were sports events/tournaments; agricultural experiences; and Aboriginal experiences, attractions or activities.

Overall, the ranks point to a gap between what urban travellers want and need and what rural Alberta is perceived to provide. The items mentioned more often related to infrastructure and support services rather than to particular types of experiences, themes, attractions or events.

Respondents were asked to explain what they felt should be improved about their top pick and those results are covered in detail in the report. It is worth noting that there was a core of responses in almost every item that identified a lack of awareness and knowledge, in addition to the feature specifically identified as 'advertising, promotion and information'. Supporting infrastructure addressed by separate items on the list (e.g., accommodation, culinary experiences, roads and service quality) were similarly identified as needing improvement under many of the niche product areas. Finally, another common improvement theme, not addressed by the original list and therefore not ranked separately, was a need for affordable prices supplemented by offering travel discounts.

TRIP PLANNING INFORMATION NEEDS

Respondents willing to take either a same-day or overnight trip to rural Alberta (approximately 2,350) identified their preferred information sources for use before leaving home and while on the trip.

- Access to print materials and professional advice was selected by over three in four respondents before leaving home and three in four while on the trip. Before leaving home, vacation guides/brochures/books/maps and visiting a travel association were more popular choices, while use of a visitor information centre was the standout choice at almost 60% for obtaining information while on the trip.
- Online access to information was also chosen by more than three-quarters of the respondents before leaving home, making it as important as print. The proportion wanting online access while on the trip was much lower, but still included more than half the respondents. Online search engines, destination websites, an online event calendar, travel booking and advisory sites were chosen far more often for use before leaving. The most popular options while on the trip were use of a search engine and GPS.
- Word of mouth was next most frequently chosen, by about half the respondents. Friends and family and one's own past experience came into play most often before leaving. While on the trip they were joined by talking to people on the way to or at the destination.
- Advertising was a preferred source for just under half the respondents. Mass media (television, magazines and newspapers in particular) were preferred most before leaving. Roadside signs or billboards were by far the predominant choice while on the trip, pointing to the sizeable proportion (38%) of respondents who evidently were prepared to make or adapt their plans on the fly.
- Just less than one in ten indicated that they would not use any information sources at all.

The various target markets have been profiled in detail at the end of each section of the report. In this summary, only select information is presented.

Older adult-only households were the most familiar with and had the most favourable impressions of rural Alberta as a leisure destination, while young adult-only households were quite the opposite, being least familiar with and having less favourable impressions. Family households fell in the middle. It is not surprising then, that in the past two years older adult-only households visited rural Alberta at a higher rate than younger households and that young adult-only households had a lower chance of visiting in the next two years.

Central and Southern Albertans held more favourable opinions, while Central Albertans had the highest chance of all regions of visiting rural Alberta in future. Northern Albertans were least likely to have visited rural Alberta in past two years. Edmonton and Calgary region residents were less likely to travel in Alberta at all and had the lowest chances of visiting rural Alberta in future. The largest concentrations of urban Albertans therefore present the greatest challenge in stimulating travel to rural areas.

In terms of EQ segments:[5]

- Free Spirits were more or less average in familiarity, favourability and chance of visiting rural Alberta on a leisure trip in the next two years. They were least likely to have visited rural Alberta in the past two years and had the highest proportion of members who said that they wouldn't take a rural trip at all, either same-day or overnight. Among Free Spirits who were willing to visit rural Alberta, Writing-on-Stone Provincial Park and the Royal Tyrrell Museum were chosen as destinations more often than average.
- Cultural Explorers were the most knowledgeable EQ segment and had the very highest chance of visiting in the next two years. Drumheller, Cochrane and Waterton were chosen more often than average as ideal locations to visit.

5. Comparisons involving EQ segments are frequently reported by indexing the results. The overall population result (i.e. the Total percentage) is set to a standard value of 100 and the comparable figures for each EQ segment are calculated relative to the Total. The higher or lower the segment index, the stronger the difference compared to the total survey population. Large differences compared to the Total of 100 are reported as 'over-index' or 'under-index'.

- Authentic Experiencers over-indexed on visiting rural Alberta in the past two years and on their chance of visiting in the next two. They chose Drumheller, the Tyrrell Museum and Elk Island as ideal locations to visit in the next two years.
- Personal History Explorers over-indexed on chance of visiting in future;
- Cultural History Buffs were more likely than average to have visited rural Alberta in the past two years. Their ideal locations included Cochrane, Fort Macleod, Stettler and Waterton.
- Virtual Travellers had low familiarity with and less favourable impressions than average. This tied in with a low chance of visiting in future and was consistent with their saying that they did not know what locations to visit.
- No Hassle Travellers had the most favourable opinions of all and indicated that they had a high chance of visiting in the next two years;
- Gentle Explorers under-indexed on chance of visiting rural Alberta in the next two years and any locations in it. They did not know where to go;
- Rejuvenators over-indexed on chance of visiting in future and selected Canmore and Waterton more often than average as destinations to visit.

Overall, the EQ segments in the Learners group (Authentic Experiencers, Cultural History Buffs, Cultural Explorers and Personal History Explorers in that order) and Escapists/ Rejuvenators appear to have the most potential to visit rural Alberta in future. The Familiarity Seekers group, especially Gentle Explorers and Virtual Travellers, present the most difficult challenge; however, No Hassle Travellers, who were also members of the Familiarity Seekers group, were more closely aligned with Learners in terms of market potential. Enthusiastic Indulgers/Free Spirits fell somewhere in between.

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Introduction

Infact Research and Consulting Inc. are pleased to present the results of a study that explores the potential of urban Alberta residents to participate in rural vacation experiences in the province. This document reports the findings of the second stage of the study, the quantitative measurement of market potential, building on the understanding of the market gained through qualitative research conducted in 2012.

Background

The rationale for carrying out a broad-based study of potential demand for leisure trips and vacations in Alberta's rural areas at this time was recognition that with the increasing growth of tourism and its position as a major economic generator in Alberta, there is a growing emphasis on the importance of encouraging more visitors to experience the many and varied tourism vacation experiences that are available in rural Alberta. Resident Albertans make up the largest segment of travellers and tourism expenditures in the province and are likely to remain of prime importance as the trend to travel domestically continues.

The 2012 Growing Rural Tourism Conference offered another point of view for focusing on rural tourism: "…the benefits generated by the [tourism] industry have been traditionally accrued by locations on the eastern slopes of the Rocky Mountains, and by the major cities of Alberta. Few of these benefits have been realized by the rural communities that populate the rest of Alberta … Rural communities in Alberta and across Canada have begun looking towards tourism as a viable industry to diversify their local economies."

The conference focused on the early steps of initiating tourism strategies and partnerships and looking at how participants might bring new sources of revenue and employment to their own communities. What was missing from this picture was knowledge of the underlying consumer demand for rural experiences – both how many might be interested (under the right circumstances and with the right appeals) and what they are looking for. Without this knowledge, strategies become driven by industry needs and perceptions of what is, without knowing what could be.

The first stage of the study started to gather qualitative information that may be used to inform marketing and product development strategies and plans that will resonate with the true target audiences within the province. The second quantitative stage defines what groups make up the target audience/s among Albertans and what current or unmet product, experience and information needs will help to grow the market.

Purpose and objectives of the quantitative study

Purpose

To quantify select findings of the exploratory qualitative research that will inform product and experience development on a regional and provincial level. The study should assess communication needs and help to define target markets.

Objectives

The research questions for the second stage of the study were as follows:

1. Profile Albertans who have taken leisure trips in rural Alberta in the past two years, or who would be interested in doing so, geographically, demographically and by Explorer Quotient (EQ) segment.
2. Investigate overall knowledge and overall impressions of rural Alberta as a destination and as a benchmark against which to evaluate future change.
3. Profile trips taken by Albertans within rural Alberta in the past two years.
4. Contrast current travel behaviour to needs and wants that would increase the amount of travel done within rural Alberta.
5. Identify interest in “experiences” including destinations, attractions, activities, etc., and particularly in seven niche product areas identified by Alberta Tourism, Parks and Recreation (ATPR).
6. Identify needs relating to trip planning information and information sources.

Methodology

GEOGRAPHIC, DEMOGRAPHIC AND EQ SEGMENTS

The market covered by the quantitative research was defined **geographically** as including residents of select urban centres of five regions within the province:

- *The Calgary region:* Calgary & Airdrie
- *The Edmonton region:* Edmonton, Sherwood Park & St. Albert
- *Southern Alberta:* Lethbridge, Medicine Hat, Coaldale, Taber, Redcliff, Drumheller, Brooks & Strathmore
- *Central Alberta:* Red Deer, Lloydminster (Alberta only), Camrose, Wetaskiwin, Sylvan Lake, Lacombe, Whitecourt & Edson
- *Northern Alberta:* Grande Prairie, Peace River, Fort McMurray & Cold Lake

Three **demographic market segments**, based on lifestage, were defined for use in the study. They were:

- *Young adult-only households*: Households consisting of one or more 18-34 year old adults with no person less than 18 years of age or over 45 years present in the household.
- *Family households*: Households consisting of one or more 25-49 year old adults with at least one person less than 18 years of age present in the household.
- *Older adult-only households*: Households consisting of one or more 45-69 year old adults with no person less than 18 years of age present in the household.

Approximately 640,000 households are included in the urban areas and lifestages covered by the survey, based on estimates from Census 2011 figures, supplemented by 2006 data. The three demographic market groups made up 59% of households in the province and were estimated to be proportionately distributed as follows:

Young adult-only households	25%
Family households	32%

Older adult-only households	43%
Total in survey population	100%

Nine **Explorer Quotient (EQ) *segments*** were of interest. They were additionally combined into four larger groups. Participants were not recruited by segment, but answered a battery of statements about their attitudes to travel during the interview. Classification was undertaken by Environics Research Group.

Environics has provided clients with an in-depth understanding of these segments internationally and nationally, through multi-layered profiling, including social values, travel motivations and experience appeals. This report confines interpretation of findings relating to EQ to identifying differences between the segments as they pertain to the objectives of the study. A brief description of each segment is included in Appendix III.

Sample size and distribution

The survey was administered online. Seven online panels were used to assemble a sample of sufficient size to permit surveying in the less populated regions. Fieldwork was carried out by Research Now, with the following panel distribution.

AirMiles	48%
Peanut Labs	21%
Valued Opinions Panel (VOP Canada – English)	17%
eRewards	8%
Lightspeed North America	5%
Clearvoice	1%
Public Opinion	1%

The original research design called for approximately one-third of interviews each to be conducted in the Calgary region, the Edmonton region and the Northern, Central and Southern Alberta regions combined. An equal number of interviews were to be conducted in each of the three lifestyle segments within each market. The rationale for choosing these quotas was to provide equal "voice" or importance to the key target markets in the survey data, rather than having the needs of smaller groups overwhelmed by the behaviours and preferences of larger groups.

The final sample distribution was somewhat different – actually far closer to the true lifestage distribution – so the figures were weighted to the target proportions (see Appendix I for the unweighted and weighted sample distribution).

All survey participants were travellers who had taken at least one discretionary leisure trip in the previous two years.

The survey soft-launched on November 23, 2012 and, after modification, the main survey was conducted between November 29 and December 31, 2012. A total of 2,391 usable responses were received by the cut-off date. Appendix II outlines the number of responses obtained in more detail.

Questionnaire and data analysis

After completion of the qualitative research, a review of objectives was conducted, followed by the compilation of a draft question list for approval. When the interview time from the soft-launch was received, a slightly longer questionnaire was adopted for the main launch. Final median survey time was 16 minutes. The questionnaire is included as Appendix V.

Due to the extension of the questionnaire after the soft launch, the 200 respondents who had completed the survey by that point were invited to complete the additional questions. Half did so, but some who did not had to be retained in the final sample because of challenges in filling the survey quotas. As a result, the sample base for some or all of the additional questions was reduced by up to 53 responses.

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

APPROACH TO THE REPORT

The strength of qualitative methods lies in providing an excellent perspective of the *range* of attitudes, opinions, beliefs and behaviours of the groups that are included in the consultation. These formed a solid base for the development of the questionnaire that was used in the survey. However, all potential lines of investigation could not be quantified in one survey. Findings relating to any topics that were addressed only during the 12 focus groups conducted as the first stage of the study may be referenced in the complementary qualitative report.

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.

All results discussed in the quantitative report that differentiate between geographic markets or other sub-groups of interest are based on differences assessed by statistical tests. Weighted bases are shown throughout the report as “n”; unweighted bases, when shown, are designated “un”.

Terminology relating to rural regions has been used consistently as follows:

- Residents of a region are referred to as living in Northern Alberta, Central Alberta or Southern Alberta. Their location was determined by the location of the city they live in (as defined earlier).
- Visitors to a region are described as visitors to Alberta North, Alberta Central and Alberta South. Regional boundaries were under review at the time this study was done. In the absence of a current definition, county lines and other geo-physical characteristics believed to be used by Statistics Canada to define the previous three Tourism Destination Regions were used as a guide for this study. Communities in the Edmonton CMA outside the City of Edmonton were allocated to Alberta Central and, similarly, in the Calgary CMA to Alberta South.

Survey findings

A note on use of the term "rural"

For the purposes of this study, a rural trip was defined as a same-day out-of-town leisure trip at least 40 km away from home (one-way) in a non-urban location, or an overnight stay away from home in a non-urban area of Alberta (with no minimum distance requirement), but not in Banff or Jasper National Park.

The qualitative research demonstrated that understanding of the term "rural Alberta" varied from person to person and could be quite different to the study definition. In addition, because the term itself could have negative connotations, the survey consistently referred to "locations outside the larger centres [Lethbridge, Medicine Hat, Red Deer, Lloydminster, Fort McMurray, Grande Prairie, Peace River, Calgary, Edmonton] and Banff or Jasper National Parks". The term "rural" was not used in any questions.

The definition shown in the first paragraph uses the term "non-urban", but some focus group participants felt that small towns would be considered urban if they offered a limited array of services or facilities associated with larger urban centres. Since small towns are included in the study definition of "rural", this term was also discarded.

In the absence of a suitable yet concise substitute, the terms "rural" and "rural Alberta" are used in the report when describing the study region. While suitable for planning purposes, the term should be used cautiously when marketing the region or destinations within the region.

The big picture

This section of the report reviews the results for several key predictors of likely success in increasing visits to rural Alberta destinations by urban Albertans without any further development or improvement to existing infrastructure, or any increase or improvement in marketing effort.

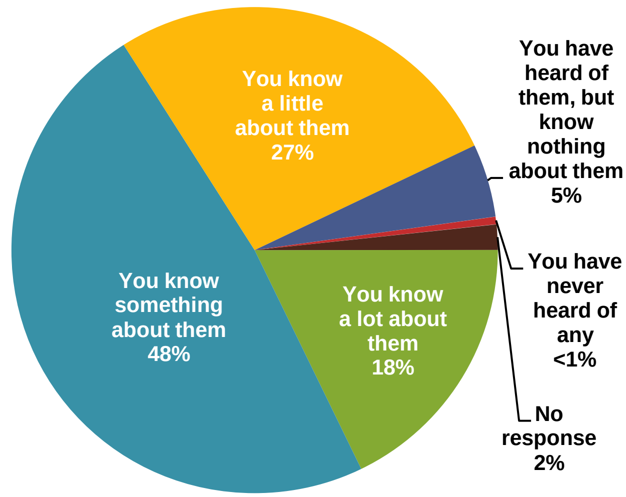
It offers guidance on market segments that may have the most potential.

It also provides a benchmark against which future changes can be measured.

Overall knowledge

Before one can use a product or go to a destination, one needs to be aware that it exists. When asked how familiar they were "with Alberta locations outside the larger cities and Banff/Jasper National Parks as places to visit on a leisure trip", simple awareness did not prove to be a problem at all and very few had no knowledge of what was on offer (Exhibit 1).

Exhibit 1: Most urban Albertans believed they were somewhat familiar with rural locations; few were unfamiliar with them
(Base:Total respondents n=2400)

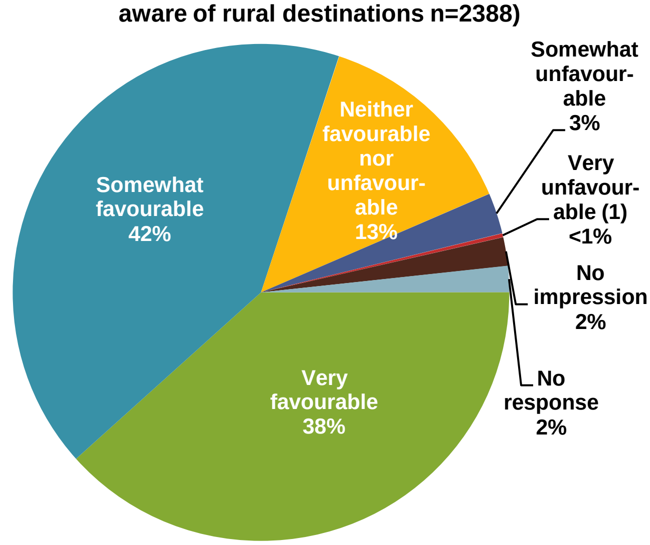


That said, with only 18% claiming that they know 'a lot' about these places, there is considerable room to improve the knowledge the market has about rural Alberta destinations.

General impressions

The extent to which a destination is regarded favourably or unfavourably will influence the desire to visit. Impressions of rural Alberta as a destination are shown in Exhibit 2.

Exhibit 2: Most urban Albertans held favourable opinions of rural Alberta as a place to visit on a leisure trip (Base:Total aware of rural destinations n=2388)

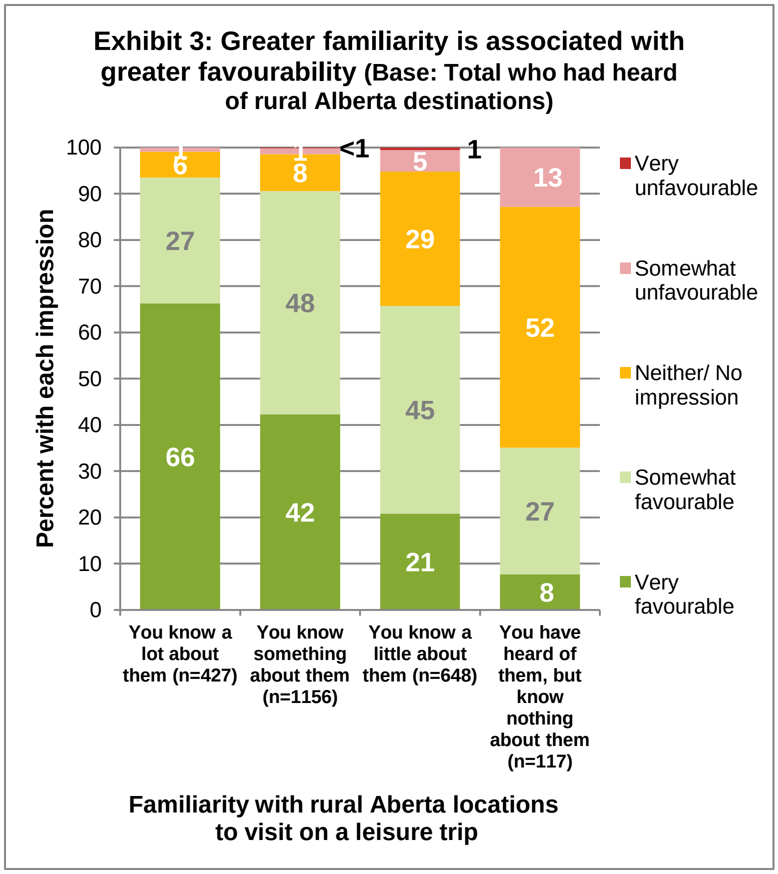


Overall, 80% of urban Albertans regard the region positively, with approximately half each having 'very' and 'somewhat' favourable perceptions.

The majority of the remainder (15%) were neutral, while only 3% had unfavourable views.

There is a distinct relationship between degree of knowledge about rural Alberta and how well it is regarded. Exhibit 3 shows that:

- Over 90% who knew 'a lot' or 'something' about the region had a favourable opinion of it as a leisure trip destination, with two-thirds of the group who knew 'a lot' expressing a 'very favourable' opinion;
- Even among the group knowing 'a little', the majority were favourably inclined;
- Those who were aware but knew nothing most often expressed neutral views;
- The small number that had a negative opinion of locations to visit in the region generally had little or no knowledge to base this opinion on.



All in all, the greater the knowledge of rural Alberta as a leisure destination, the better the impression of it was likely to be.

INTEREST IN VISITING RURAL ALBERTA

Chance of visiting

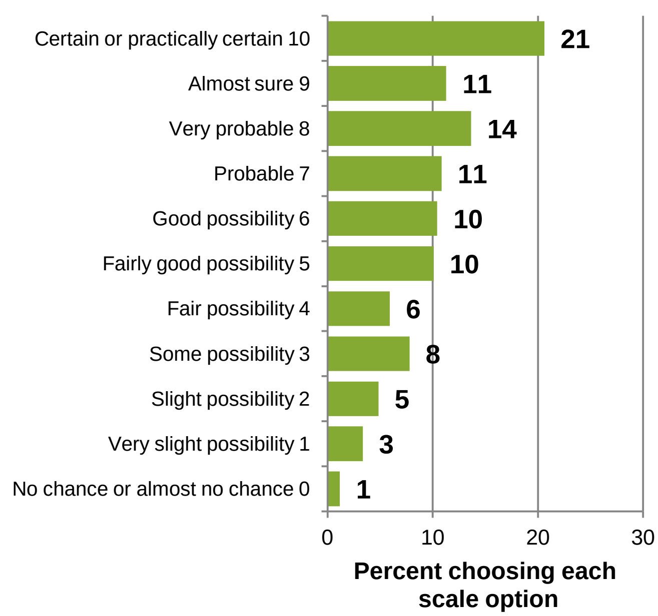
Chances of visiting rural Alberta on a leisure trip in the next two years were rated using a version of the Juster Probability Scale. The average score on a Juster scale is often close to the true proportion that will make a purchase or carry out an action.

Exhibit 4 shows the results. The modal or largest group at 21% scored an unusually high 10 out of 10, equivalent to being 'certain or practically certain' they would visit. If the next group, those scoring their chances of visiting 9 out of 10, is added, then almost one-third of urban Albertans were pretty sure they would make this trip.

Other positive answers were scored above the midpoint of 5, bringing the total potential market to 67%. Coincidentally, the average score was also 67%.

It will be seen in the next section of the report that 34% of respondents had visited at least one location in rural Alberta in the past two years. This means that there is the potential to double the number of discreet visitors to rural Alberta destinations (from the current 34% to the maximum estimated rate of 67%).

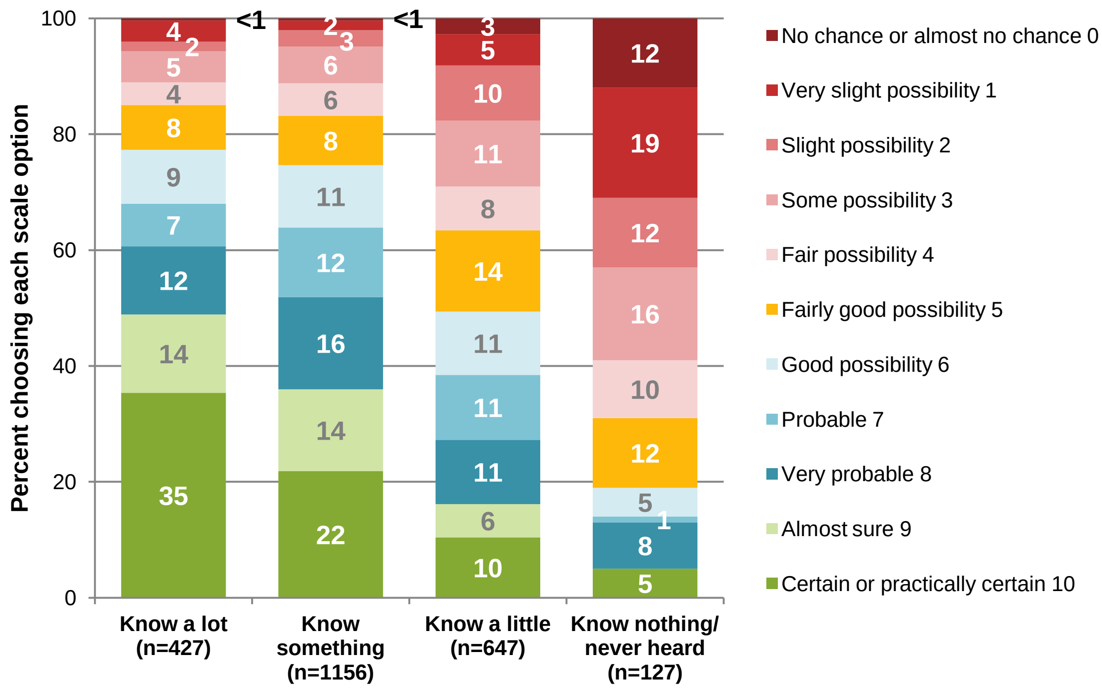
Exhibit 4: Chances of visiting rural Alberta were high, with 67% choosing a probability of 6/10 or greater (Base: Total respondents n=2400)



The previously discussed big picture questions throw some light onto the question of how such growth could be achieved.

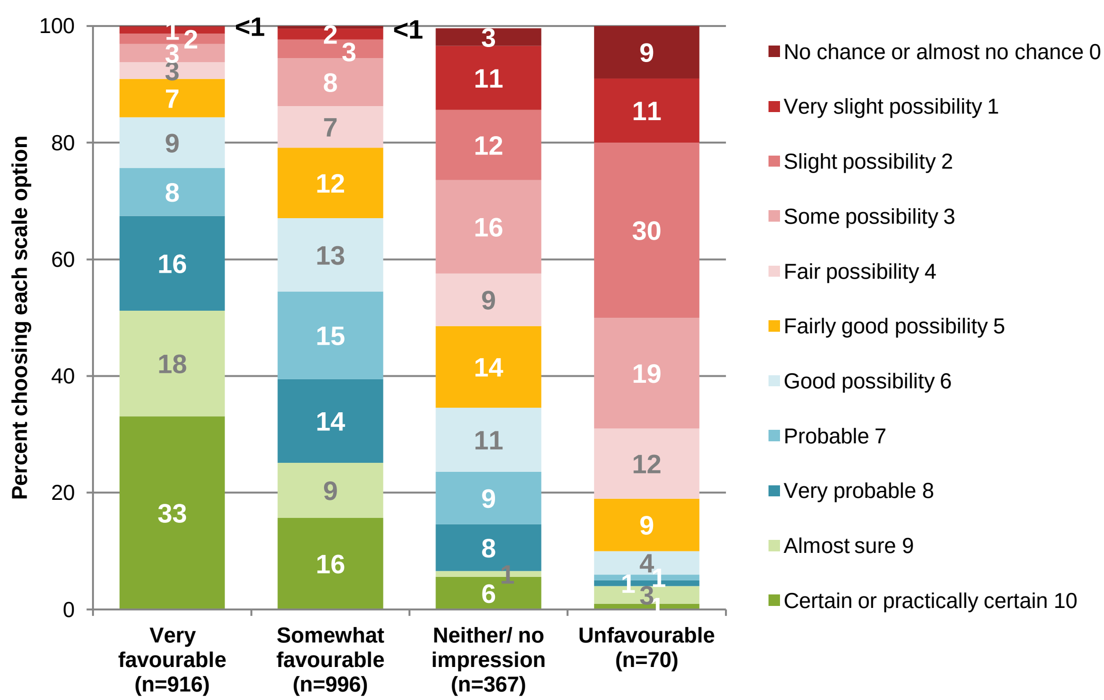
Exhibits 5 and 6 display the close relationship between overall familiarity with the region and overall favourability of opinion of the region and likelihood of visiting. Of the two, favourability had the larger impact, particularly in

Exhibit 5: Chances of visiting rural Alberta in the next two years were severely impacted by lack of knowledge of the region
(Base: Degree of familiarity with the region as a place to visit on a leisure trip)



deterring visitation when the impressions were unfavourable or neutral. However, since these perceptions were influenced by knowledge, improvements to both will be necessary to increase visitation.

Exhibit 6: Chances of visiting rural Alberta in the next two years were directly related to the impressions respondents had of the region (Base: Degree of favourability. Excludes respondents unfamiliar with the region)

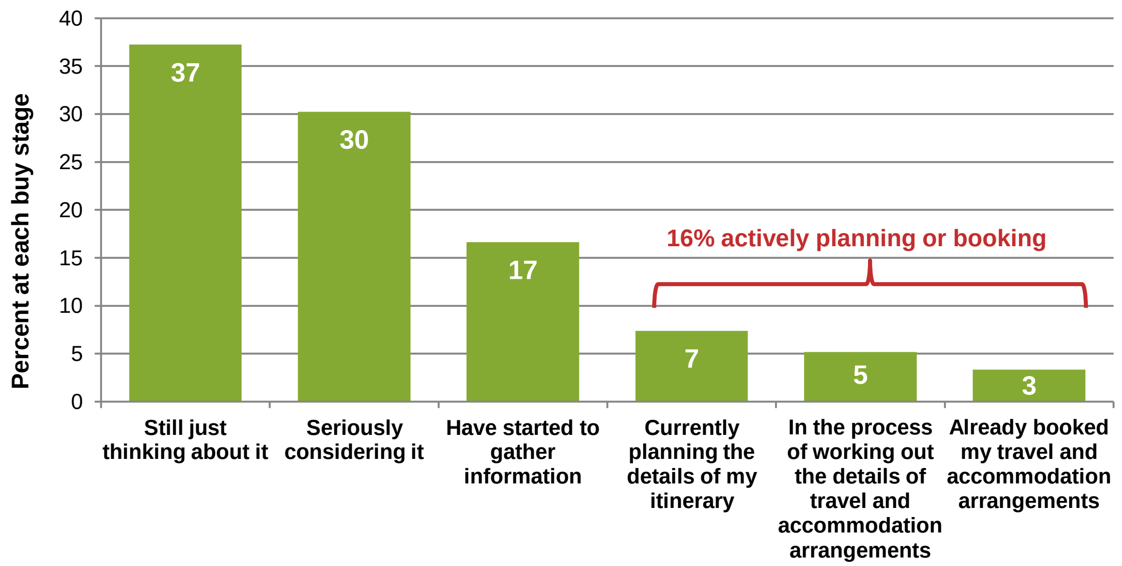


Point reached in the buy cycle

The two-thirds of respondents rating their chances of taking a rural leisure trip in the next two years positively at 6/10 or higher were asked how far along they were in planning or booking the trips … in other words, what point they had reached on the buy cycle. Their answers are shown in Exhibit 7.

In November/December, at least six months before the peak season for visiting rural Alberta, two thirds of potential visitors had done little more than 'think about' or 'seriously consider' such a trip, while one-third had started to move along in the process. Of the latter group, about half had started to gather information and half had entered a stage of active planning and booking.

Exhibit 7: Most were still early in the buy cycle at the time of the survey
(Base: Total respondents with a 6-10/10 chance of taking a rural trip n=1604)



PROFILE OF URBAN ALBERTANS ON BIG PICTURE MEASURES

By demographic characteristics

HOUSEHOLD LIFESTAGE PROFILES

- Young adult-only households were made up of 1.9 people on average, with 30% living alone and 12% in a group with 3 or more people. 75% of young adult respondents were aged 25-34 years and 25% aged 18-24. Half were married or living together as a couple (49%) and almost as many were single (48%). They were the most highly educated group as almost half had a university degree. 45% were living in the area they were born, the highest of the three lifestage groups. The majority, however, came from elsewhere and included most of the more recent arrivals to their regions.
- The family household lifestage had an average of 3.8 persons in the household, with 49% having pre-school children; in 31% the youngest child was primary school-age and in 20% they were teenagers. The majority were therefore pre-teen and younger.

  Family household respondents were most often aged 35-44 (47%) and more often younger (25-34, 34%) rather than older (45-49 years, 19%). The majority, 86%, were married or living common-law, with the remainder being single parents, about half unmarried and half divorced, separated or widowed. The level of education in this lifestage resembled the average.
- Older adult-only households had an average of 2.0 people in the household. 22% lived alone and 15% had adult children still living with them. The majority, 70%, were married or living as a couple, while 19% were divorced, separated or widowed and 11% were unmarried. The largest age cohort was 55-64 years (46%), followed by 50-54, 65-69 and then 45-49 year olds (23%, 21% and 10% respectively). They were slightly less well educated than average.

  Older adult respondents were least likely of the three lifestages to have been born in their region of residence (30%) but most had lived there for over 20 years and were therefore not new to – and presumably unfamiliar with – the area they lived in.

DEMOGRAPHIC DIFFERENCES ON BIG PICTURE MEASURES

Scores for both familiarity and favourability increased with an increase in age and lifestage. The difference was most telling among those saying they had a 'very favourable' impression of rural Alberta as a leisure trip destination as 30% of young adult-only households gave this answer compared to 47% of older adult-only households (family households being in the middle at 38%). This difference coincided quite well with age (18-34 year olds being less favourable than 55+ year olds) and marital status (widowed/separated/divorced respondents being most favourable).

Age-related responses to the question on likelihood of visiting were a little different. Young adult-only households, 18-34 year olds and unmarried singles rated their chances of visiting in the next two years slightly lower than family households or older adult-only households, 35-54 and 55+ year olds, married or widowed/separated/divorced respondents.

One of the questions that arose from the qualitative research was whether people who had recently moved to a new region felt less informed about places they could visit in rural Alberta. The results showed that while people who had lived in their current region for more than 20 years – and had often been born in the region – felt more familiar with what rural Alberta has to offer, there was no overall difference in familiarity between more recent arrivals (up to 5 years) and those living there between 5 and 20 years. Any difference in knowledge evidently persists for a very long time.

By region

Overall, knowledge of rural Alberta was remarkably similar in all five geographic regions, but somewhat more favourable impressions were held in Central and Southern Alberta. Central Alberta residents also reported the highest chances of a visit in the near future and Edmonton and Calgary the lowest.

Young adult-only households in Calgary and Edmonton were less knowledgeable about rural Alberta than their regional counterparts, but no less favourably inclined. The age trend mentioned earlier in familiarity and favourability existed in all the regions. Among the young adult-only households, rural travel intentions were highest in the group of other large centres and lowest in Calgary.

By behaviour

Respondents who had visited rural Alberta locations in the past two years were somewhat more knowledgeable about the region, held more favourable views and were very significantly more likely to travel there again in the next two years (average chance of 7.74 vs. 6.18 among non-visitors). They were also further along in the buy cycle (21% vs. 12% respectively were actively planning or booking their next trip).

As past experience contributed to higher scores on all big picture measures, it would appear to be potentially advantageous to convert non-visitors to visitors.

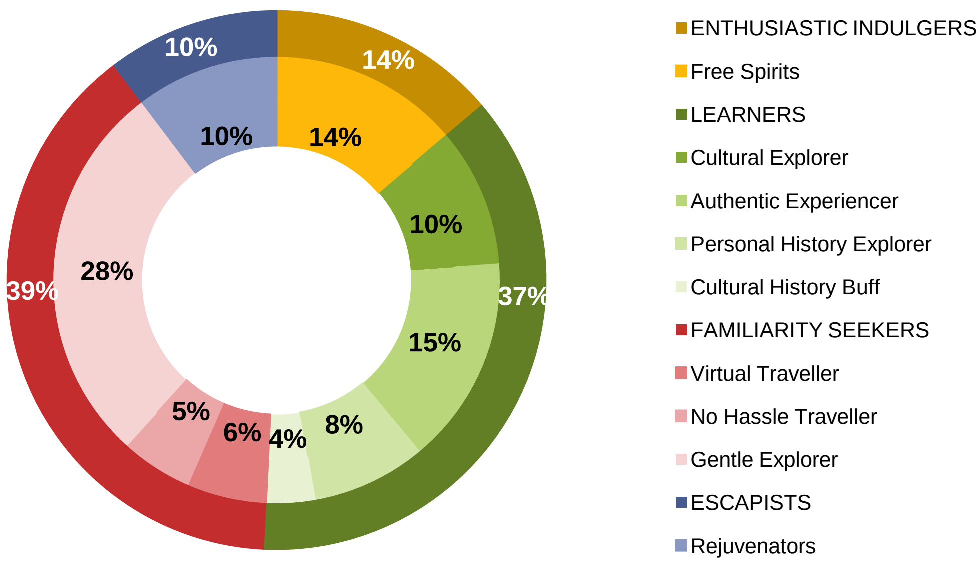
By EQ segment

EQ SEGMENT PROFILES

Exhibit 8 shows what proportion of the respondents were classified into each EQ segment.
Gentle Explorers were most numerous at 28% of the sample, followed by Authentic Experiencers at 15% and Free Spirits at 14%.

Cultural History Buffs were the smallest segment at 4% followed closely by two

Exhibit 8: EQ segments and groups among urban Albertans in three life stages (Base: Total classified respondents n=2318)



segments in the Familiarity Seekers group – No Hassle Travellers at 5% and Virtual Travellers at 6%.

The segments' distinctive demographic features were as follows:

- Free Spirits were overrepresented among young adult-only households, especially in the 25-34 age group; many were single/unmarried and they were more likely than average to have a university education.
- Cultural Explorers were found more often in Northern Alberta, among older adult-only households aged 50-54 and especially 55-64 years and among separated, divorced and widowed respondents, particularly females.

- Authentic Experiencers were overrepresented in Northern Alberta, among older adult-only households with adult children living at home (also in households with teenagers) and were more likely than average to have a university degree.
- Personal History Explorers were overrepresented in Southern Alberta and included a high proportion of older unmarried singles aged 50-64 years, with a high school education.
- Cultural History Buffs lived more often in Central Alberta, in older adult-only households with adult children, or in one-person households. They were more often female, separated, divorced or widowed and had completed a university education.
- Virtual Travellers were found more often in Southern Alberta, lived in family households with school-age children and were aged 35-44 years. In addition, this segment was overrepresented in older adult-only households, among separated, divorced or widowed 55-69 year olds, with a high school education.
- No Hassle Travellers were overrepresented in Central Alberta, in older adult-only households made up of one person only, often separated, divorced or widowed, or with adult children in the household.
- Gentle Explorers were somewhat more likely than average to live in Edmonton. They were overrepresented in young adult-only households and family households with pre-school children, so the respondents' age groups extended from 18 to 44 years. More singles/ unmarrieds were found in this segment than average.
- Rejuvenators were overrepresented in Central and Northern Alberta. They lived more often in family households with school age children (where parents were aged 35-49) or in older adult-only households with respondents being particularly likely to fall into the "younger" 50-54 year old cohort. Educational achievement was overrepresented both for high school and post-secondary qualifications.

EQ SEGMENT DIFFERENCES ON BIG PICTURE MEASURES

Cultural Explorers were the most knowledgeable EQ segment while No Hassle Travellers had by far the highest favourability score. Virtual Travellers scored lowest in both.

In terms of interest, Cultural Explorers indicated that they had the highest chance of visiting, with a score of 7.57. No Hassle Travellers and Rejuvenators followed at 7.06 and 7.04 respectively. The lowest chance of visiting was reported by Virtual Travellers at 5.79.

The results for all segments and groups are shown indexed against the average score in the first column in Exhibit 9.[6] On this basis, only Cultural Explorers were slightly more likely to visit rural Alberta.
The second column in Exhibit 9 shows the index against the total just for respondents with a high chance of visiting. In this group, there were distinct differences. Cultural Explorers in particular, along with Authentic Experiencers and Personal History Explorers, indexed strongly. As a result, the entire Learners group over-indexed. Also over-indexing, but not as strongly as Learners, were Escapists/Rejuvenators and No Hassle Travellers. On the other hand, the remaining segments in the Familiarity Seekers group (Virtual Travellers and Gentle Explorers), under-indexed.

Exhibit 9: EQ segments' chances of visiting locations in rural Alberta on a leisure trip in the next two years

	Index	
	Average chance	High chance (9-10/10)
Total respondents classified (n=2318) Average score	*6.66*	*9.65*
Index	*100*	*100*
ENTHUSIASTIC INDULGERS/ Free Spirits (n=320)	**103**	**105**
LEARNERS (n=858)	**106**	**126**
Cultural Explorers (n=243)	114	151
Authentic Experiencers (n=350)	102	121
Personal History Explorers (n=192)	105	114
Cultural History Buffs (n=82)	98	104
FAMILIARITY SEEKERS (n=902)	**92**	**72**
Virtual Travellers (n=134)	87	66
No Hassle Travellers (n=120)	106	115
Gentle Explorers (n=649)	91	66

6. Comparisons involving EQ segments are frequently reported by indexing the results. The overall population result (i.e. the Total percentage or average score) is set to a standard value of 100 and the comparable figures for each EQ segment are calculated relative to the Total. If the EQ segment figure is higher than that of the Total, it is over the index; if lower, it is under the index. When the difference is approximately statistically significant (e.g., 130 – or 30% higher than the index of 100), it is termed "over-indexed". Similarly the number is termed "under-indexed" when the index is significantly less than 100 (e.g., 65). The higher or lower the index, the stronger the difference compared to the total survey population.

	Index	
ESCAPISTS/ Rejuvenators (n=238)	106	116

Over-index = Strong Very strong Under-index = Weak Very weak

Current travel to rural Alberta

TRIPS TAKEN IN PAST TWO YEARS

Trip purpose

All survey respondents lived in an urban area and had taken at least one qualifying leisure trip away from home in the past two years. These trips included:

- Overnight trips, defined as a trip with a stay away from home of at least one night – taken by 98%, and
- Same-day trips with a one way distance of at least 40 km away from home – taken by 92%.

The purpose of the trips taken by the respondents is shown in Exhibit 10. All respondents had to have taken at least one leisure trip, defined as a trip for pleasure/vacation, to visit friends or relatives or for personal reasons. This chart shows that the respondents to the survey were highly likely to have taken the first two trip types, but were less likely to have travelled for personal reasons or for the non-qualifying motives. Nevertheless, a substantial proportion had travelled for personal reasons and for business or personal business.

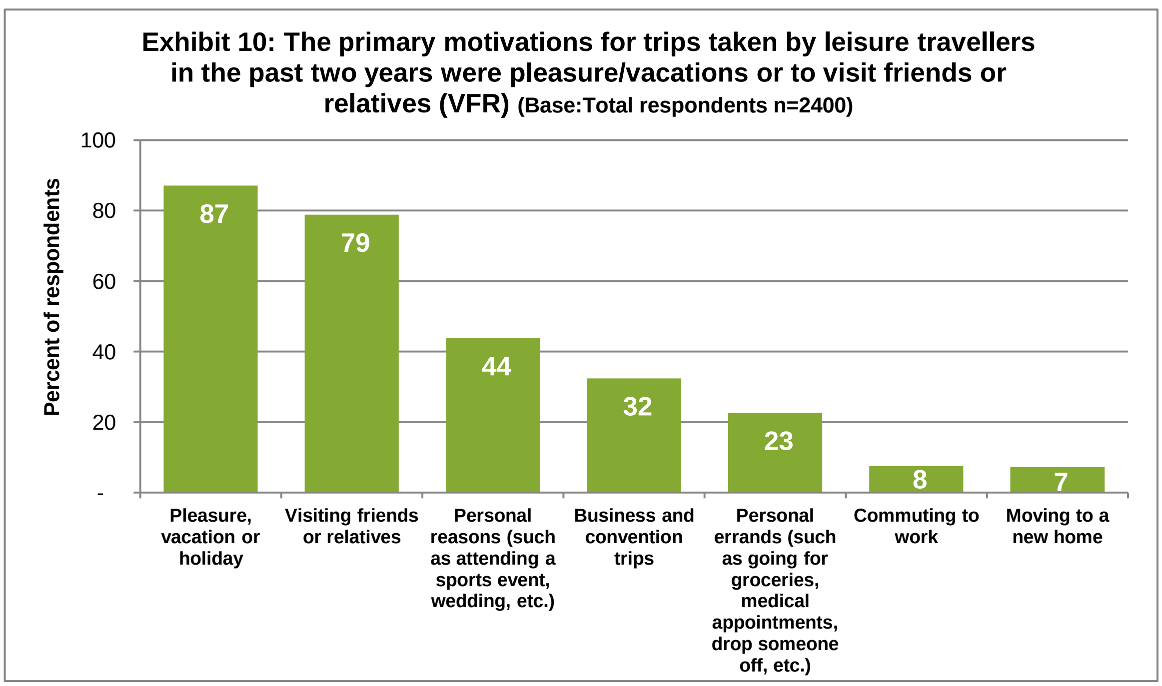


Exhibit 10: The primary motivations for trips taken by leisure travellers in the past two years were pleasure/vacations or to visit friends or relatives (VFR) (Base:Total respondents n=2400)
Percent of respondents
100
80
60
40
20
-
87
79
44
32
23
8
7
Pleasure, vacation or holiday
Visiting friends or relatives
Personal reasons (such as attending a sports event, wedding, etc.)
Business and convention trips
Personal errands (such as going for groceries, medical appointments, drop someone off, etc.)
Commuting to work
Moving to a new home

Trip destinations

REGIONAL DESTINATIONS

A series of questions identified where in the world the respondents had been on a leisure trip in the past two years, with responses drilling down to locations within rural Alberta.[7] Exhibit 11 shows the general regions that had been visited and Exhibit 12 the regions visited within Alberta.

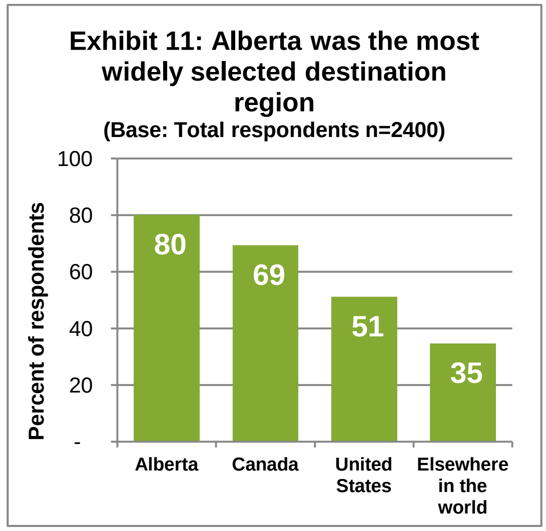


Exhibit 11: Alberta was the most widely selected destination region
(Base: Total respondents n=2400)

From Exhibit 11 it is evident that urban Albertans who travel, while loyal to their own province, also visited destinations elsewhere, notably other Canadian provinces and the United States (US). One in three travelled to other overseas destinations. The competition is clearly significant.

Within Alberta, there was no one outstanding destination region, as between 50% and 60% each visited Banff and/or Jasper National Parks, the City of

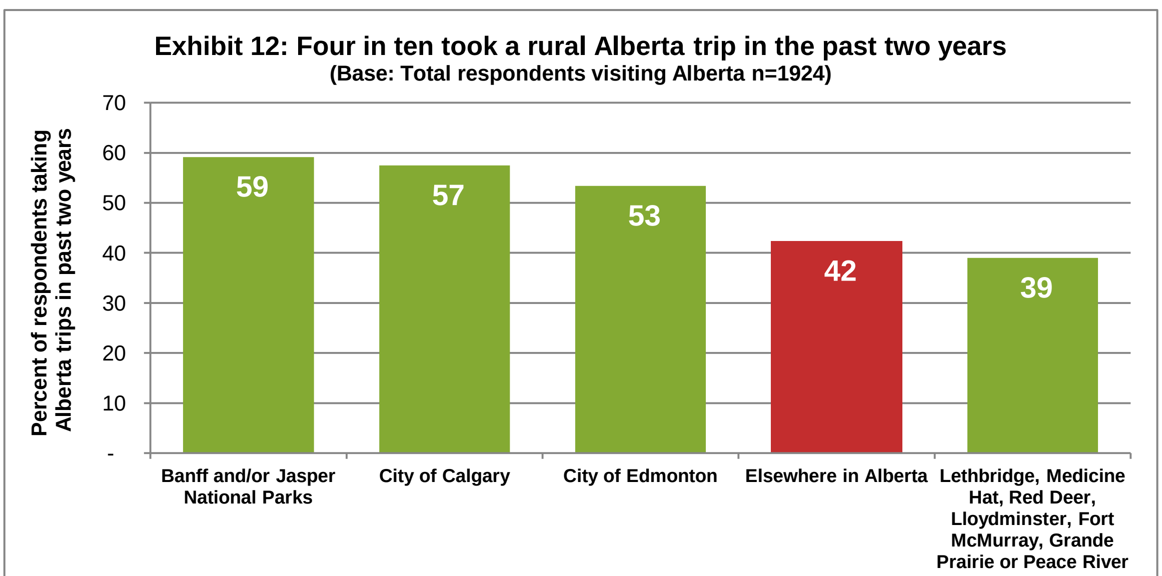


Exhibit 12: Four in ten took a rural Alberta trip in the past two years
(Base: Total respondents visiting Alberta n=1924)

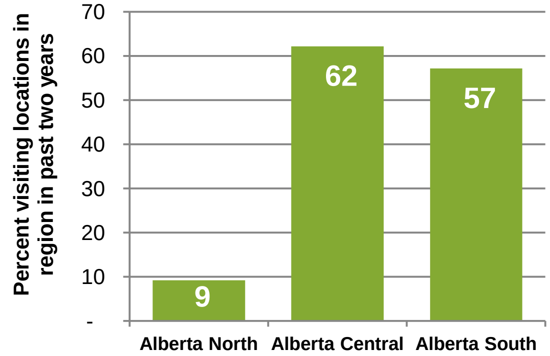
For the purpose of this study, a rural location was most often a town (village, hamlet, summer village or other form of municipality), but could be a provincial park, national park other than Banff or Jasper, scenic location such as a water body not associated with these parks, or a provincial museum or historic site, since most are located outside towns. Other attractions were classified with the town they were located in. Towns formed by far the most predominant type of response.

Calgary and/or the City of Edmonton. Nevertheless, four in ten Alberta travellers visited rural Alberta, about the same proportion as visited other large centres in the province. Four in ten Alberta travellers is equivalent to one in three (34%) urban Albertans in the markets examined by this study.

RURAL ALBERTA DESTINATIONS

Within rural Alberta, the most popular regions to visit were Alberta Central and Alberta South. Relatively few urban residents went to places in Alberta North (see Exhibit 13).

Exhibit 13: Locations in Alberta North were visited by far fewer urban Albertans than places in Alberta Central or South (Base: Total with a named rural Alberta location n=805)



However, the figures in Exhibit 13 could be misleading. Place of residence was by far the most important determinant of the locations actually visited in the past two years. Once that is taken into consideration, the regions visited changed considerably, as may be seen in Exhibit 14.

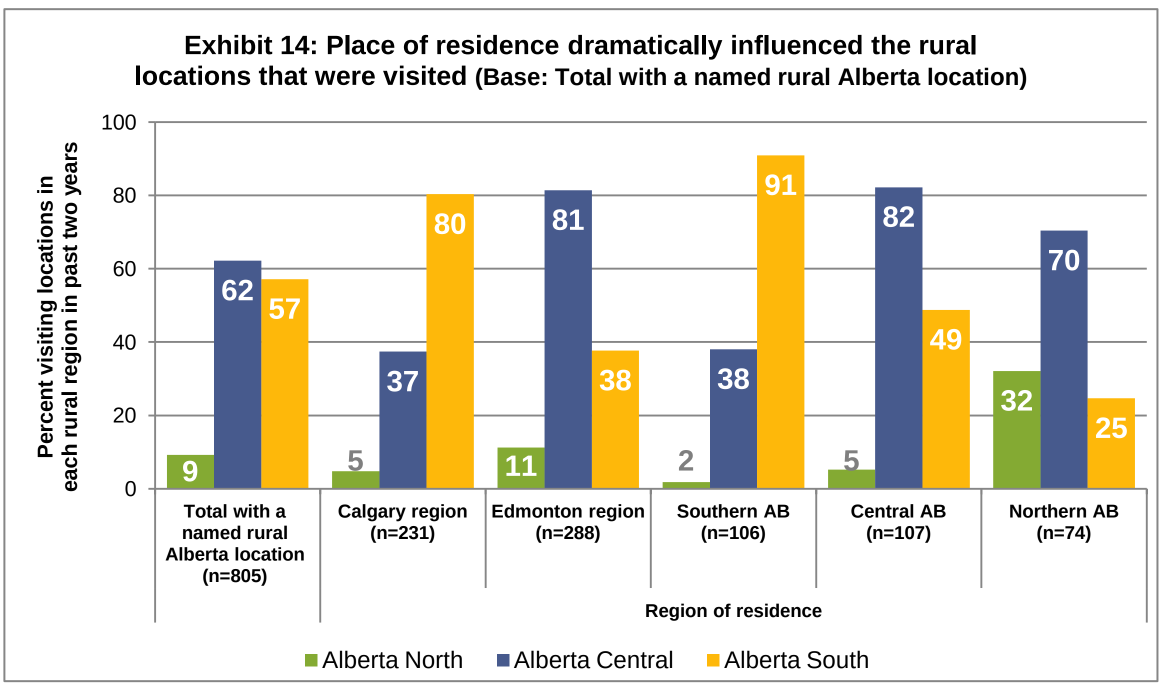
In the populous Calgary region, many more people chose destinations in Alberta South than other rural areas within the province. Their choice of southern locations was exceeded only by residents of urban areas in Southern Alberta itself. However, despite having to travel a considerable additional distance to reach Alberta Central locations, Southern Albertans were as likely to visit Alberta Central as Calgarians.

Southern Albertans were least likely to visit Alberta North on leisure trips, while Northern Albertans were most likely to travel to northern locations. Nevertheless, the primary rural destination choices among Northern Albertans were in Alberta Central and they were far more likely to visit Alberta South than vice-versa.

Choices made by residents of the metropolitan Edmonton region were equally influenced by location. Although they were more than twice as likely to visit destinations in Alberta North as people located further south, their primary choice was to visit Alberta Central locations. A significant proportion also visited Alberta South.

While residents of the Edmonton region were as likely to visit Alberta Central as residents of that region, Central Albertans were far more likely to choose destinations in Alberta South.

This very lengthy description simply means that distance matters! In fact, few rural locations had sufficient pulling power to draw significant numbers of visitors from outside their own area. Exhibit 15a and b show that only two locations visited, of the hundreds named, drew more than 10% of urban Albertans over two years: Drumheller and Canmore.



The most popular destinations, visited by at least 5% of residents of each region, are shown in Exhibit 15a and b. Exhibit 15a demonstrates that most are located relatively close by. Colour markings show which locations are within the region for the three non-metropolitan destination regions and which regions were visited by Calgary and Edmonton area residents.

Clearly, Calgary region residents tended to visit nearby Alberta South locations, as did those living in Southern Alberta. Edmonton region residents mentioned locations in the adjacent Alberta Central region most often. Northern Alberta residents supported locations in the region, but also favoured some larger centres in Alberta Central.

The locations that cross regional boundaries are of interest as they evidently have an attraction of sufficient strength to encourage driving greater distances. Drumheller and Canmore were the primary locations with this level of pull. Waterton succeeded in drawing Central Albertans south and Sylvan Lake succeeded in attracting Calgarians north. However, there were two less well developed tourism destinations that evidently had something to draw people from further away. One was Camrose, attracting Northern Albertans south, possibly to attend Big Valley Jamboree. The other was Stony Plain, attracting Southern Albertans north, possibly for another music festival, the Blueberry Bluegrass Festival (note: these suggested attractions are based on discussion in the focus groups).

Exhibit 15a: Locations mentioned most often by residents of each region

Locations visited by:	Total visiting rural Alberta (n=815)	Region of residence (Base=Residents of the region) Calgary region (n=235)	Edmonton region (n=290)	Southern Alberta (n=108)	Central Alberta (n=108)	Northern Alberta (n=74)*
30% to 39%				Waterton		
20% to 29%		Canmore Drumheller				
10% to 19%	Drumheller Canmore	Waterton	Camrose Drumheller	Crowsnest Pass Drumheller Pincher Creek	Rocky Moun-tain House Drumheller	Hinton Whitecourt Valleyview Canmore
5% to 9%	Waterton Camrose Sylvan Lake	Kananaskis High River Okotoks Cochrane Sylvan Lake	Vegreville Canmore Drayton Valley Sylvan Lake Athabasca Edson Whitecourt	Cypress Hills Bow Island Milk River Blairmore Brooks Patricia Stony Plain Cardston Fort MacLeod Taber Strathmore	Sylvan Lake Canmore Camrose Lacombe Hinton Leduc Stettler Waterton Wainwright Drayton Valley Airdrie Ponoka Whitecourt	Grande Cache Camrose Cold Lake Slave Lake Dunvegan

*Note: un is higher for Total visiting and for all regions except Northern Alberta (un=52).

Exhibit 15b shows exactly the same information as Exhibit 15a, but colours identify how select individual locations drew visitors across regional boundaries.

This table shows that:

- Drumheller drew from all regions except Northern Alberta and particularly from the Calgary region.

- Canmore drew from all areas except Southern Alberta, whose go-to mountain destination was Waterton.
- After Southern Alberta, Waterton drew visitors from Calgary and Central Alberta.
- Camrose drew particularly from the Edmonton area, but also the Central and Southern regions.
- Sylvan Lake had no particular regional strengths, but featured in the lists of Calgary, Edmonton and Central Alberta residents.
- Although they did not draw 5% or more rural visitors in general, Whitecourt visitors were from three areas (Northern and Central Alberta and the Edmonton region).
- Similarly, Drayton Valley attracted visitors from two regions, Edmonton and Central Alberta.

Exhibit 15b: Locations mentioned most often by residents of each region

Locations visited by:	Total visiting rural Alberta (n=815)	Region of residence (Base=Residents of the region)				
		Calgary region (n=235)	Edmonton region (n=290)	Southern Alberta (n=108)	Central Alberta (n=108)	Northern Alberta (n=74)*
30% to 39%				Waterton Park		
20% to 29%		Canmore Drumheller				
10% to 19%	Drumheller Canmore	Waterton Park	Camrose Drumheller	Crowsnest Pass Drumheller Pincher Creek	Rocky Moun-tain House Drumheller	Hinton Whitecourt Valleyview Canmore
5% to 9%	Waterton Park Camrose Sylvan Lake	Kananaskis High River Okotoks Cochrane Sylvan Lake	Vegreville Canmore Drayton Valley Sylvan Lake Athabasca Edson Whitecourt	Cypress Hills Bow Island Milk River Blairmore Brooks Patricia Stony Plain Cardston Fort	Sylvan Lake Canmore Camrose Lacombe Hinton Leduc Stettler Waterton Park	Grande Cache Camrose Cold Lake Slave Lake Dunvegan

Locations visited by:	Total visiting rural Alberta (n=815)	Region of residence (Base=Residents of the region)		
			MacLeod	Wainwright
			Taber	Drayton
			Strathmore	Valley
				Airdrie
				Ponoka
				Whitecourt

*Note: un is higher for Total visiting and for all regions except Northern Alberta (un=52).

Looking at the data a different way in Exhibit 16, the locations visited most often by people who went to each destination region, regardless of where they live, may be seen.

Drumheller and Canmore were the largest draws among those visiting Alberta South. Visitors to Alberta South particularly favoured two other areas as well, Waterton National Park and the Crowsnest Pass region, including Crowsnest Pass and Pincher Creek (and the various other towns and attractions in the region, not shown in this chart as they were mentioned considerably less often).

In addition, Drumheller was mentioned frequently as a destination by Alberta Central visitors, again demonstrating its power to attract longer distance visitors. However, Camrose in particular and Vegreville, Rocky Mountain House and Lacombe – all located in Alberta Central – were mentioned more often as locations visited, followed by Sylvan Lake.

The only other destination to cross regional boundaries was Whitecourt, mentioned both by visitors to Alberta North and Alberta Central.

The most popular destination visited in Alberta North was Grande Cache, possibly because a high proportion of the northern sample came from Grande Prairie.

Exhibit 16: Locations mentioned most often by visitors to each region

Locations visited by:	Total with a named rural Alberta location (n=805)	Regions visited in past two years (Base=Visitors to region)		
		Alberta South (n=460)	Alberta Central (n=501)	Alberta North (n=75)

Locations visited by:	Total with a named rural	Regions visited in past two years (Base=Visitors to region)		
50% or more		Drumheller		
40% to 49%		Canmore		
30% to 39%		Waterton NP	Camrose	
20% to 29%		Crowsnest Pass Pincher Creek	Vegreville Rocky Mountain House Lacombe Drumheller Sylvan Lake	Grande Cache
10% to 19%	Drumheller Canmore	Okotoks High River Kananaskis Brooks Cochrane Fort MacLeod Airdrie	Ponoka Stettler Drayton Valley Hinton Whitecourt Barrhead St. Paul Westlock Edson Leduc Mundare Pigeon Lake	Slave Lake Valleyview Dunvegan Worsley Hilliards Bay PP Whitecourt High Prairie High Level Athabasca Fox Creek Hinton

Profile of One Trip

One location was picked at random from the list provided by respondents who had visited a rural location. This place became the reference point to describe one of their rural trips in more detail.

Locations visited and main destination

Over 200 locations were deemed to be the "main" destination on the approximately 800 rural trips profiled. This means that travel is widely dispersed with few dominant locations being found.

The top 10 rural "main" destinations are listed below and include many of the locations already discussed above … and one surprise. They made up between 2% and 7% of all main destinations, so it is again evident that none dominate present rural travel.

1. Drumheller
2. Canmore
3. Waterton
4. Camrose
5. British Columbia
6. Hinton
7. Sylvan Lake
8. Kananaskis
9. Vegreville
10. Wainwright

The inclusion of British Columbia as the fifth largest main destination on trips that include visits to rural Alberta may be a concern, but also represents an opportunity to pull exiting Albertans off the highway to see more of what the province has to offer.

The survey provided some information about how many and what other locations beyond the main destination were visited while on a rural trip.

- Overall, 56% included only one location.
- 4% included a location in British Columbia and 2% in other Canadian provinces. 2% also visited the United States, mainly Montana.

- Trips that included visits to seven of the more popular rural locations were profiled to try to understand how their itineraries might be structured. A list of other locations mentioned relatively frequently on those trips is shown in Exhibit 17.
  - With the exception of Sylvan Lake, which retained its visitors exclusively at an above average rate, the remaining destinations were likely to include visits to more than one location.
  - There was leakage to the City of Calgary among visitors to Kananaskis, Drumheller and Airdrie and to Red Deer among Sylvan Lake visitors;
  - Leakage to Banff or Jasper National Parks took place among visitors to Canmore and Hinton; and
  - Out-of-province leakage occurred to British Columbia among Waterton and Hinton visitors; and to Montana, particularly among Waterton visitors. So, while out-of-province destinations were not frequently mentioned when rural locations were visited, they did appear to impact some of the more popular locations, generally coinciding with close border crossing points rather than "en route" locations in Alberta.
  - Canmore and Kananaskis were interesting in that Kananaskis visitors were far more likely to also visit Canmore than vice-versa and were much less likely than average to be the only place visited.
  - In general, these results suggest that people like to visit places near one another while on a rural trip.

Exhibit 17: Locations visited on trips to some of the more popular rural destinations

Locations visited by:	Locations visited							
	Drumheller	Canmore	Camrose	Waterton	Kananaskis	Hinton	Sylvan Lake	Airdrie
30% and over					Canmore			
20% to 29%		Banff NP		BC Pincher Creek Cardston	Calgary	Jasper NP		Calgary
10% to 19%	Calgary	Kananaskis		Montana		BC Grande Cache	Red Deer	Balzac Carstairs

Locations visited	Locations visited							
No other locations	47%	46%	45%	44%	33%	45%	66%	40%

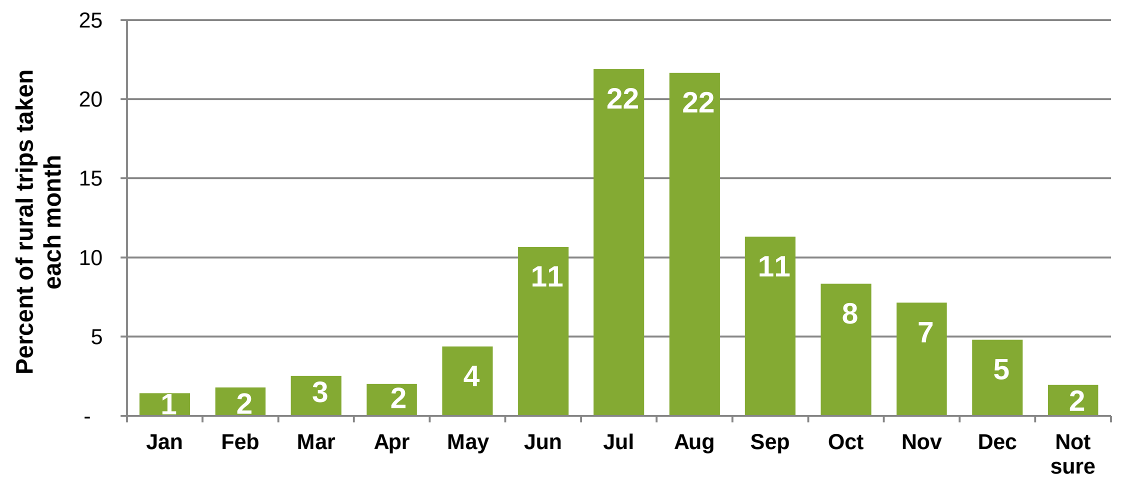
Note small bases: Unweighted bases for Waterton, Kananaskis, Hinton, Sylvan Lake and Airdrie were between 20 and 49; Camrose, Canmore and Drumheller bases were between 50 and 75.

Month of travel

The randomly selected rural trip that was profiled took place most often in July or August, the peak of the summer season (see Exhibit 18). This was followed by visits in the fall and early winter (September through November) and spring (May and June).

December, encompassing visiting friends and relatives (VFR) during the Christmas period, really represented the end of annual rural travel as very few trips were taken during the winter months or even in early spring (January through April).

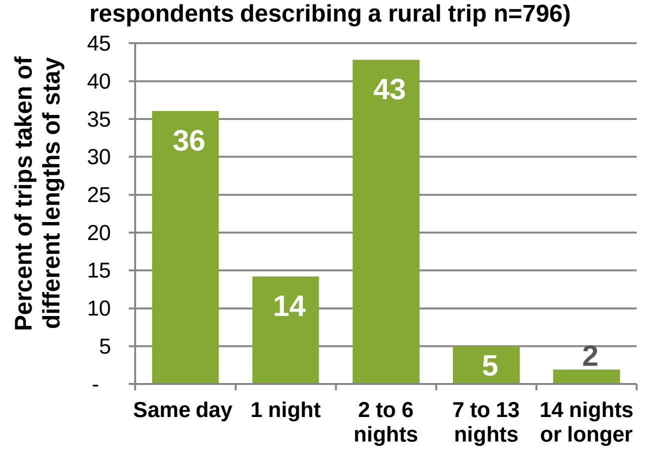
Exhibit 18: Rural travel peaked in summer and was lowest in winter, from January to April **(Total respondents describing a rural trip n=796)**



Length of stay

The earlier discussion about distance to rural travel destinations – and the findings in the focus groups – suggested that same day travel was very popular. The quantification showed that while this was true, with over one-third of trips being day trips, almost two-thirds involved a stay away from

Exhibit 19: Over one-third of rural trips were same day only, but the most popular trip length was 2-6 nights **(Total respondents describing a rural trip n=796)**



home of at least one night (Exhibit 19).

The most popular of the overnight trips was a stay of two to six nights, far more than only one night. Few lasted more than a week.

The vast majority of trips involved spending either the day on a same day trip, or all nights away from home, at the randomly selected location (83%). For 9% of trips, at least one night was spent at the location as part of a longer trip involving multiple overnight stops. For an almost equal number, the selected location was simply a visit lasting a few hours or a day on a similar multi-stop trip of one or more nights away from home (8%). This means that the majority of randomly selected trips were described through the lens of the major destination.

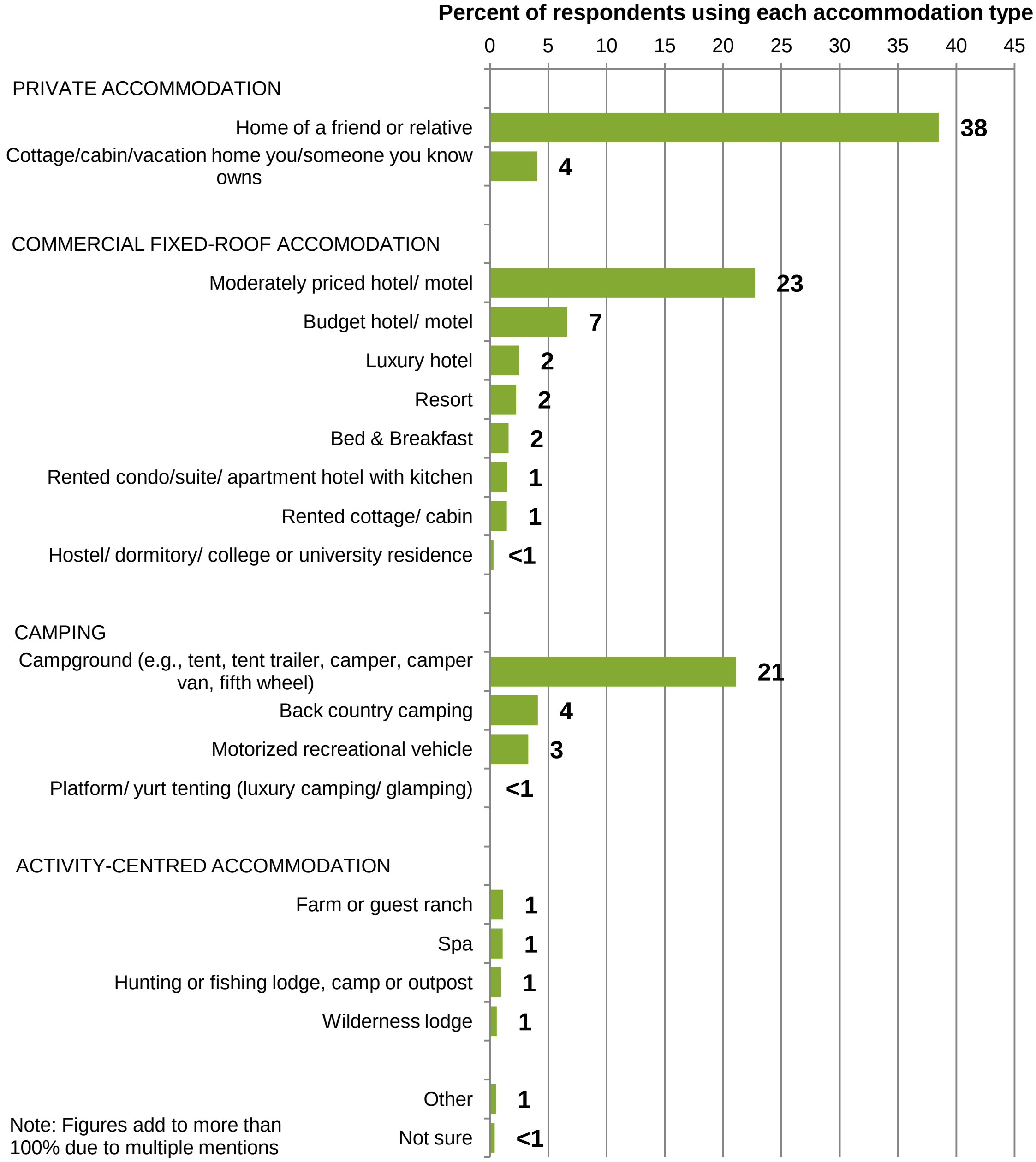
Type/s of accommodation used

The most frequently used accommodation type was the home of friends or relatives. Since this usually corresponds with trip purpose, it may be concluded that almost two in five rural trips are for VFR purposes (Exhibit 20).

Next most frequently used was commercial fixed-roof accommodation, with “moderately priced” hotels or motels dominating the choices made. Within the same category, budget priced accommodations were used more often than more expensive or luxury ones.

Camping was chosen next most often, especially camping at campgrounds.

Exhibit 20: Private homes, moderately priced fixed roof accommodation and campgrounds were by far the most popular choices of accommodation on a rural Alberta trip
(Total respondents taking an overnight rural trip n=509)

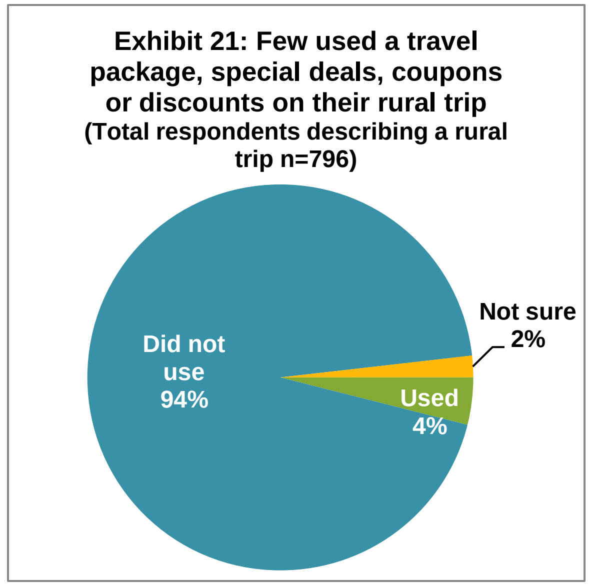


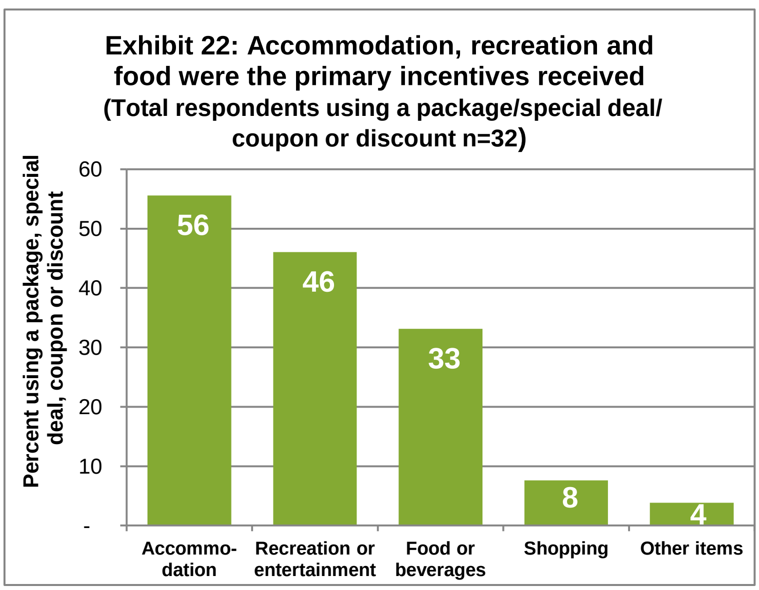
Note: Figures add to more than 100% due to multiple mentions

Use of travel packages or other financial incentives

Albertans visiting rural locations rarely used financial incentives such as travel packages, special deals, coupons or discounts on their trips (Exhibit 21).

The few who had, mainly thought the incentives had included accommodation, recreation or entertainment and food & beverages. A few used incentives for shopping (Exhibit 22).





Activities on trip

The top fifteen activities on rural trips were as follows:

Over 30% did …

1. Walking/ running
2. Relaxing

20% to 29% …

3. Visited friends or family
4. Strolled the streets of a small town and browsed
5. Saw natural wonders, wildlife or scenic views
6. Went hiking/ backpacking

10% to 19% …

7. Saw historical sites, museums or interpretive centres
8. Went camping
9. Visited a National or Provincial Park
10. Dined out at a notable local/ home town restaurant
11. Visited/ stayed at a lake, reservoir, river or stream
12. Went swimming
13. Toured backcountry roads
14. Went sightseeing
15. Shopped for local food or visited a food producer

The story that these activities tell is one of a relaxing, leisurely trip that did not involve challenging, physically strenuous activities (with the exception, perhaps, of hiking/backpacking).

Unsurprisingly, given the use of the homes of friends or relatives for accommodation, one of the key activities was visiting friends or family. Beyond that (or perhaps in addition) there were varying degrees of walking, from strolling to running and hiking, touring by vehicle, visits to natural sites to camp, view scenery or enjoy water, visits to historically significant attractions and appreciation of food, whether at local eateries or by purchasing local food.

Exhibit 23 (on two pages) shows the complete set of activities that respondents used to list the things they did on the trip, grouped by type of activity.

Exhibit 23: Activities undertaken while on a rural trip tended to focus on the outdoors, nature, water and places, relaxation and family
(Total respondents describing a rural trip n=796)

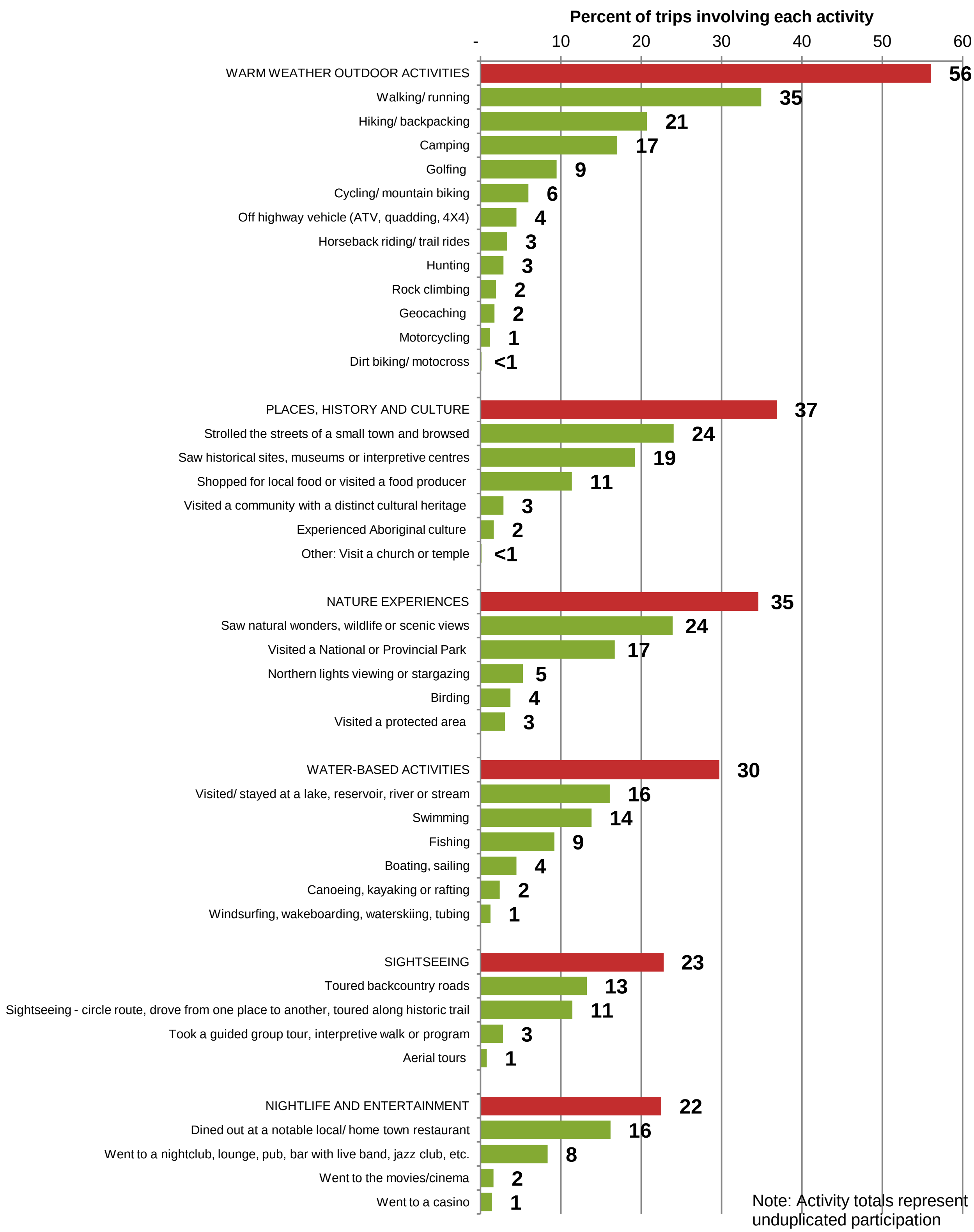
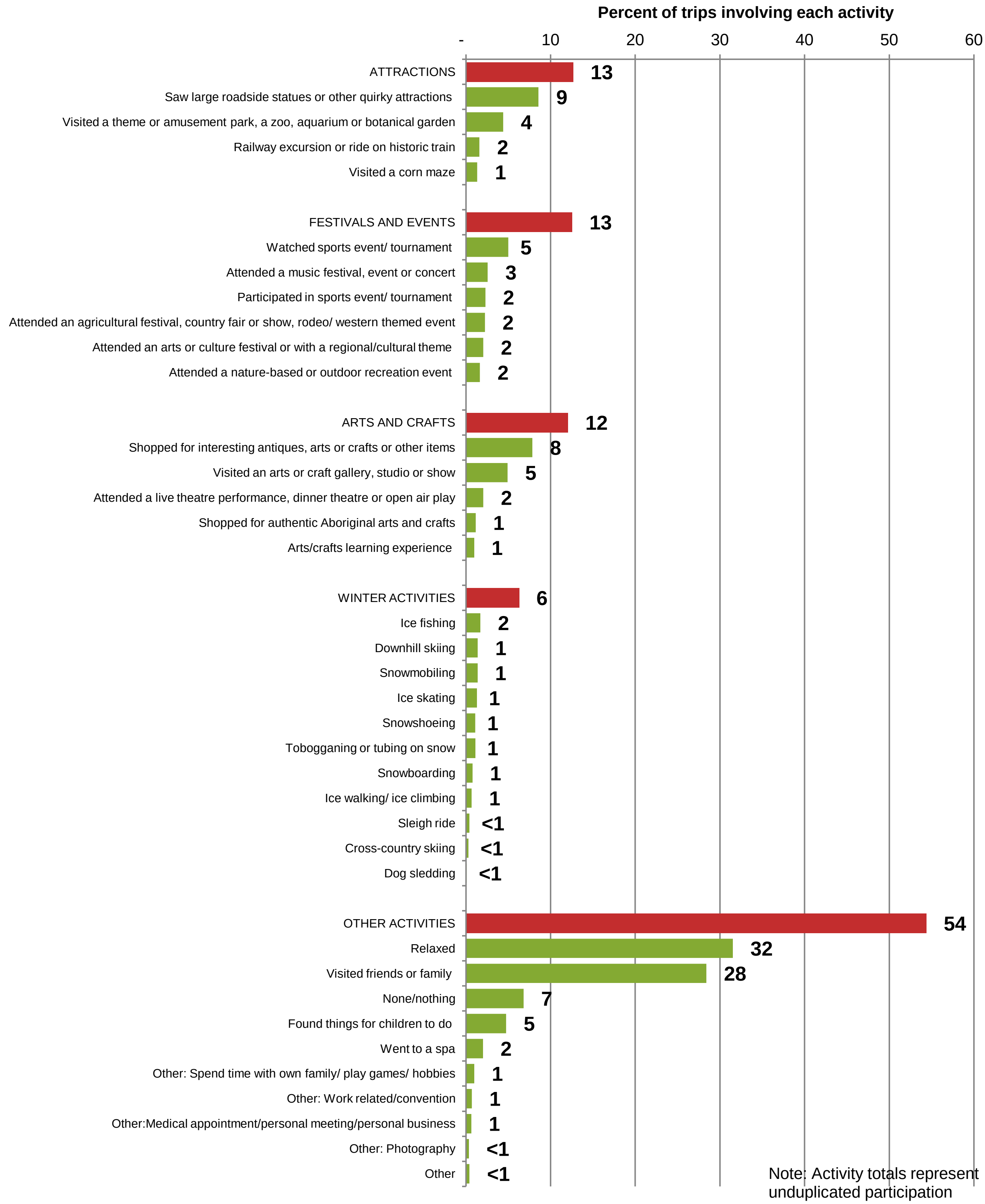


Exhibit 23 continued: Activities undertaken while on a rural trip tended to focus on the outdoors, nature, water and places, relaxation and family (Total respondents describing a rural trip n=796)



Two groups of activities stood out. The group called “other activities” encompassed the things people do that are not generally influenced by tourism product providers and were engaged in by over half the respondents. They included time with family and friends, including spending quality time with members of one’s own family. Also relaxing … and even doing nothing at all.

The second major group included warm weather land-based activities, done by over half the respondents (56%). This is consistent with the finding that the great majority of rural trips are taken in good weather, particularly in summer. Conversely, winter activities were rarely selected (6%).

If water based activities (30% on their own) are added to the land based activities, participation in outdoor activities well exceeded any other group at 60% unduplicated. However, this figure demonstrates that the separation between land and water based activities was somewhat artificial, since most who did such things as visiting a water body, swimming, fishing or various forms of boating also engaged in land based activities at about twice the average rate.

Next most frequently mentioned was the group termed “places, history and culture” with 37% participating in at least one of the activities. The most popular pointed to interest in experiencing the flavour – literally and figuratively – of small towns, rather than exposure to distinct cultural heritage.

Nature experiences, especially scenic views and visits to parks, were linked to outdoor activities, sightseeing and relaxation and formed the third most frequently chosen set of activities, enjoyed on over one-third of rural trips (35%). Skygazing and birding were niche products in this group.

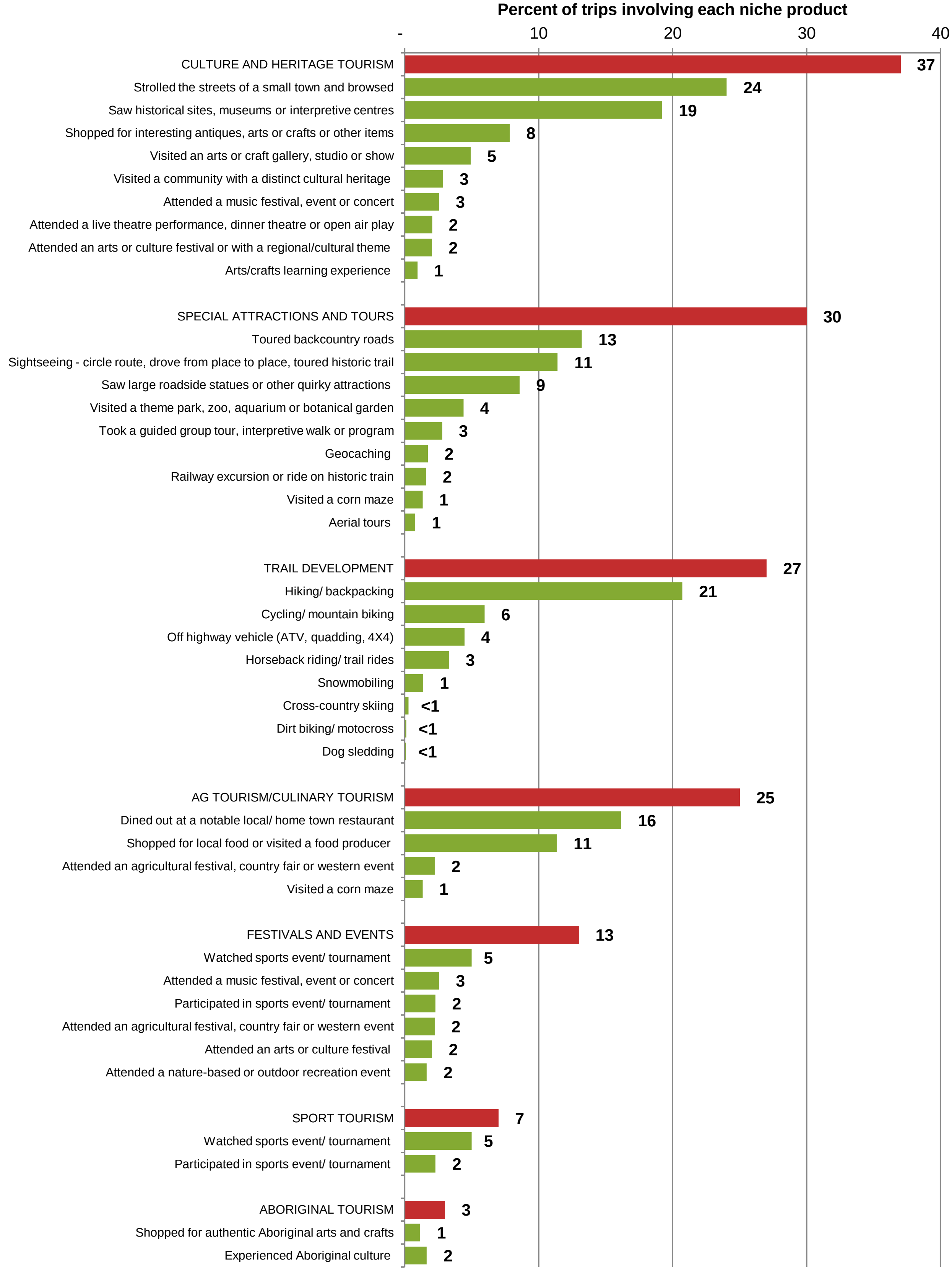
This was followed by sightseeing, done by one in four rural visitors (23%), particularly touring backcountry roads and taking circle routes, driving from one place to another or touring along an historic trail.

Participation in nightlife and entertainment formed the final set of activities with widespread use at 22%. It was dominated by local restaurants, followed by bars and other nightspots.

Far less frequently undertaken were visits to attractions (13%), festivals and events (13%) and arts and crafts (12%).

Select activities were combined into different groups reflecting niche product areas. The results for these groups are shown in Exhibit 24. Of the seven groups, four currently enjoy a high level of participation – culture and heritage tourism, special attractions and tours, trail development and ag/culinary tourism.

Exhibit 24: Activities undertaken while on a rural trip indicate that four product areas are currently popular (Total respondents describing a rural trip n=796)



PROFILE OF URBAN ALBERTA VISITORS TO RURAL ALBERTA

Geographic profiles

Place of residence has already been shown to be a – if not *the* – major determinant of rural destination selection. In this section, additional insights into current travel to rural locations by region are discussed.

TYPE OF TRIP

The type of trip taken in the past two years by Southern, Central and Northern Albertans varied somewhat from those taken by residents of metropolitan Calgary and Edmonton. With over 40% agreeing, residents of these three regions were far more likely to travel to carry out personal errands, such as going for groceries, medical appointments or to drop someone off, reflecting the need for services located in larger cities. The comparable figure in Calgary and Edmonton was just over 10%.

Residents of these three regions were more likely to undertake VFR trips (about 85% did), and Central and Northern Albertans travelled more for business and were more likely to commute to work. Northern Albertans exceeded the others in travelling for pleasure, vacation or holiday and for personal reasons, such as attending a sports event or wedding. Overall, Northern Albertans had the highest proportion of residents travelling for all purposes.

LEISURE TRIP DESTINATIONS

Northern Albertans were most likely to travel to other provinces on a leisure trip and least likely to visit the USA. Calgary area residents were somewhat more likely than the remaining regions to visit other Canadian destinations, while both Calgary and Edmonton residents were somewhat less likely to travel within Alberta for pleasure (77% and 78% respectively vs. Southern, Central and Northern Alberta at 89%, 83% and 85% respectively).

Destination regions in Alberta varied by place of residence as shown in Exhibit 25. The proportion visiting rural Alberta ranged from a low of 33% among Northern Alberta residents to a high of 48% among Central Albertans. Competition was strong from Banff/Jasper National Parks and the "other" metropolitan centre in Calgary and Edmonton; from Calgary and other urban centres in Southern Alberta; and from Edmonton in Central and Northern Alberta.

Overall, the region with the highest propensity to travel for any reason, Northern Alberta, was least likely to visit rural destinations in Alberta for leisure purposes.

Exhibit 25: Locations visited on Alberta leisure trips in past two years by region of residence

Locations visited	Total travelling within Alberta (n=1924) %	Region of residence (Base=Residents of the region) Calgary region (n=613) %	Edmonton region (n=625) %	Southern Alberta (n=237) %	Central Alberta (n=222) %	Northern Alberta (n=227) %
City of Calgary	57	35	66	81	67	59
City of Edmonton	53	57	32	49	77	86
Lethbridge, Medicine Hat, Red Deer, Lloydminster, Fort McMurray, Grande Prairie or Peace River	39	36	31	62	39	45
Banff and/or Jasper NP	59	70	62	38	45	56
Elsewhere in Alberta*	42	38	46	46	48	33

Higher than others　Lower than others

* Equivalent to rural Alberta

TRIP CHARACTERISTICS

Other interesting regional patterns found relating to rural travel arrangements included:

- Northern Albertans in particular took longer rural trips, with almost two-thirds lasting from two to six nights. Central and Northern Albertans were both less likely to take same day trips and more likely to travel for over one to two weeks.
- Northern Albertans appeared to be far more likely to stay at the home of friends or relatives on their rural visits;
- The activities that people took part in varied by region of residence and may reflect on the locations visited. The following were key differences:

- Calgary region residents were more likely to take part in land-based warm weather outdoor activities – but less likely to be involved in water-based activities or to have done nothing at all. They more often stated that they had seen natural wonders, wildlife or scenic views on their trips and were less likely to have visited attractions of all types.
- Edmonton region respondents were less likely to have taken part in land-based warm weather outdoor activities or water based activities; to have seen natural wonders; experienced places, history and culture, notably Aboriginal culture; or visited attractions.
- Southern Alberta residents were more likely than average to have participated in warm weather outdoor activities, both land and water-based, especially walking/running, hiking/backpacking, visiting or staying at a lake, reservoir, river or stream, fishing, cycling/mountain biking, geocaching and motorcycling. In the winter, Southern Albertans were most likely of all regional residents to go snowshoeing.

  Southern Albertans were far more likely than others to have had a nature experience, particularly when visiting national or provincial parks and to have enjoyed natural wonders. They were most likely of all to go sightseeing. While nightlife and entertainment was not their thing, they were above average in attending a music festival, event or concert. They were below average in visiting family and friends on their rural trips – possibly because they were busy doing so much else!
- Central Albertans stood out for participating in water based activities, particularly fishing and boating/sailing. They were the most likely to have used off highway vehicles (OHV) but least likely to have engaged in winter activities. They were especially likely to visit friends or family and mentioned watching a sports tournament or taking a railway excursion more often than others.
- Northern Albertans were distinct for having the highest rates of strolling the streets of small towns and browsing, seeing historical sites, museums or interpretive centres, visiting attractions, notably large roadside statues or other quirky attractions, railway excursions, visiting a corn maze or casino. Northern Albertans were the most likely group to have visited friends and relatives, but also to have gone camping and done nothing at all on the trip.

Lifestage profiles

YOUNG ADULT-ONLY HOUSEHOLDS

Young adult-only households were distinctive in currently travelling more for personal reasons than other lifestages, slightly more for VFR and more to move to a new home. They were especially likely to visit other Canadian provinces. In Alberta, Banff and Jasper National Parks and the City of Calgary were by far the most popular destinations, while rural Alberta was less likely than average to have been visited (33%).

Within rural Alberta, there were no differences between the lifestage groups in the regions they visited. However, individual towns appeared to draw different lifestages at different rates. Young adult-only households had visited Waterton in particular (but not from Edmonton), Drayton Valley (not from Calgary), Bow Island and Onoway (both from other large centres), Mayerthorpe and Lamont (both from Edmonton) at a higher than average rate.

They were much less likely to take rural trips longer than 6 nights away from home and more likely to visit only one place while away. Those from other large centres went back-country camping more often than the older lifestages. The activities they had participated in followed average rates for the most part, with the following exceptions:

- More went cycling or mountain biking, snowshoeing (particularly from other large centres) or geocaching, visited a protected area (especially from Calgary) or attended a music festival, event or concert (especially from other large centres).
- Proportionately fewer visited historical sites, museums or interpretive centres (mainly from other large centres), participated in activities in the 'arts and crafts' section, especially shopping for authentic Aboriginal arts or went birding.

FAMILY HOUSEHOLDS

Family households were the least likely to have travelled outside of Canada and the US in the past two years and were the group most likely to have visited the City of Edmonton. 44% visited rural Alberta. Drumheller was mentioned almost twice as often as a destination in this lifestage as in the adult-only groups (especially from Edmonton), as were Hanna (from Calgary) and Innisfail (from Edmonton and other large centres), though at much lower levels than Drumheller. Rocky Mountain House and Stettler were visited more often both by family and older adult-only households than by young adult-only households. Child friendly attractions were associated with each of these destinations.

The family households' profiled rural trips rarely took place in October, were more often two to six nights in duration and less often than average a same day excursion (especially from other large centres). Accommodation at a campground was overrepresented.

With regard to activities on the trip, proportionately more participated in water-based activities, most notably swimming (mentioned more than twice as often as for young adult-only households and at three times the rate of older adult-only households) and more went camping. They visited attractions, including large roadside statues or other quirky attractions, a corn maze, watched a sports tournament, attended nature-based or outdoor recreation events and looked for and found things for children to do more often than other lifestages. Families from the Edmonton region and other large centres had the highest participation rates in water-based activities, especially swimming and fishing, in camping, OHV use and having nature experiences.

Older adult-only households

Trips made in the past two years by older adult-only households were distinctive for being less likely to be for business/conventions, commuting to work or moving to a new home than either of the younger lifestages. Older adult-only households were also somewhat less likely to visit Alberta on their leisure trips. Those who did, however, particularly favoured rural destinations (51%), while a smaller than average proportion visited Banff/Jasper National Parks, Calgary and Edmonton. Vegreville (from Edmonton), Rocky Mountain House, Stettler, Ponoka and Rosebud were visited more often.

The selected rural trip occurred more often than average in September and less in December. Older adult-only households took more trips lasting two weeks or longer and fewer of two to six nights' duration (especially from Edmonton and other large centres).

While on their trips they dined out at notable local or home town restaurants and golfed at double the rate of the younger lifestages. They also enjoyed places, history and culture, especially strolling the streets of small towns and shopping for local food, visited an arts or craft gallery, studio or show, relaxed or went sightseeing on backcountry roads (more often from Edmonton and Calgary). They were particularly likely to have participated in the ag tourism/ culinary tourism and cultural heritage tourism niche product categories.

While active on their trips, they were underrepresented in participating in physical activities –camping, engaging in winter activities, using OHVs or going horseback riding.

EQ profiles

Each of the EQ segments had slightly different current travel profiles, as described below.

- Enthusiastic Indulgers/Free Spirits' current travel patterns included a higher level of commuting to work, overseas travel and visits to Calgary and Banff/Jasper National Parks in the past two years.
- While Cultural Explorers over-indexed in travelling for business/convention and running personal errands, they were also likely to be overseas travellers and to visit the United States. On their Alberta trips, they were overrepresented among visitors to Edmonton and Banff/Jasper National Parks.
- Authentic Experiencers travelled more often for personal reasons, were overseas and United States visitors and overrepresented among Banff/Jasper National Parks visitors. They were also one of only two EQ segments that were over-indexed in visiting rural Alberta.
- Personal History Explorers' travel patterns generally reflected the average distribution.
- Cultural History Buffs travelled more often than average for business/convention purposes, were United States and overseas travellers … and were the second EQ segment to be overrepresented in visiting rural Alberta.
- Although Virtual Travellers had travelled for leisure in the past two years, they were much less likely to take both overnight (in particular) and same-day trips, suggesting that the number of trips they had taken was lower than for any other EQ segment. They were underrepresented in all trip types except moving home, were much less likely than average to travel overseas or to visit Banff/Jasper National Parks.

- Like Virtual Travellers, No Hassle Travellers were less likely to take overnight and same-day trips and were underrepresented in all trip types except moving home and in visiting most destinations.
- Gentle Explorers were also less likely to take overnight and same-day trips.
- Escapists/Rejuvenators were particularly likely to commute to work and take business/ convention trips and tended not to travel internationally.

As a group, Familiarity Seekers were less likely to travel for pleasure, vacation or holiday, for personal reasons or on business trips. They were also more likely to say they had not been on an overnight trip or a same-day trip.

Learners were overrepresented on VFR trips and in visiting rural Alberta, along with overseas destinations.

Profiles of EQ segments by locations visited in rural Alberta are not reported due to small sample sizes and the potential to draw conclusions based on spurious or unreliable data. EQ segments' location preferences are profiled later in the section covering ideal rural trips.

Desired experiences and product development opportunities

All respondents were asked the following question: "Now imagine your ideal trip to visit Alberta locations outside the larger centres and Banff/Jasper National Parks. This ideal trip should include features that would make you want to travel more often, or stay longer, in such Alberta locations. Please create two ideal trips, one a same day trip and the other a trip lasting one or more nights".

A series of questions then asked for information on the same criteria that were used to profile trips taken in the past two years. The discussion that follows compares where, when and how trips to rural Alberta are currently taken with the ideal in order to identify gaps and opportunities.

IDEAL LOCATIONS TO VISIT ON SAME-DAY AND OVERNIGHT TRIPS

From a marketing perspective, the good news is that many locations were selected as places to visit on an ideal rural Alberta trip, so travel would be widely dispersed; the bad news is that the ideal trip destinations chosen suffer from a lack of cohesiveness that would help to market key locations that act as attractors. The results were even more diverse than for the destinations actually visited.

Another challenging result was that over one-third could not mention a single place they would like to visit. Lack of interest was the likely reason, since their big pictures scores tended to be less positive than average. However, only a few people were adamant that they had no interest at all in rural trips. Some of the more telling statistics are shown in Exhibit 26.

Exhibit 26: Statistics relating to choice of main and other destinations in rural Alberta

	Ideal same-day trip (n=2400)	Ideal overnight trip (n=2400)
Total places mentioned:		
All destinations	275	250
Main destination	180	160
Did not know where they would go	34%	35%

	Ideal same-day trip (n=2400)	Ideal overnight trip (n=2400)
Only mentioned cities or Banff/ Jasper NP	12%	16%
Would not take a trip like this	6%	4%
Did not know what places they would visit besides the main destination	0%	1%

Other conclusions that may be drawn from the statistics in Exhibit 26 are as follows:

- The finding that more locations were mentioned for same-day trips than trips lasting one or more nights suggests that a more diverse array of locations closer to home were considered, while fewer locations (but not a lot fewer) had the drawing power to sustain overnight stays.
- Those respondents who mentioned only the excluded national park or urban locations may not have read the question properly, or may have been saying that this was where they would spend their leisure time in Alberta, not in rural Alberta. If the latter, then one in five households would not be in the market for a rural Alberta leisure trip at all. (Their answers to the questions on the ideal trips were excluded from the analysis.)

Regional destinations

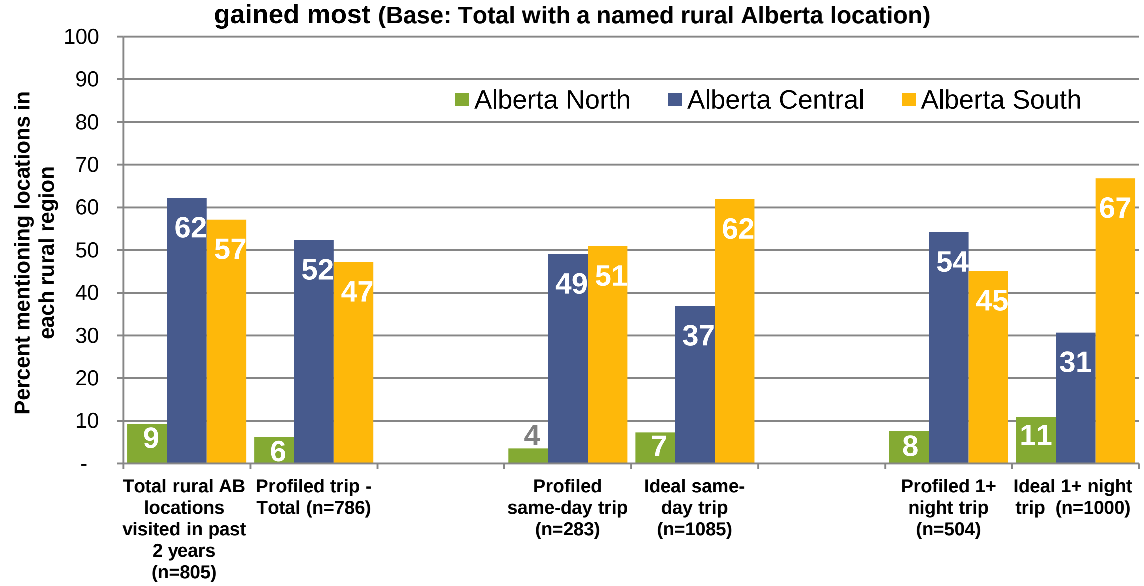
Exhibit 27 compares the regions in which the “ideal” locations are found with the regions actually visited in the past two years. Results here include only responses where an ideal rural location was actually named.

The first set of bars compares the destinations visited on the one past trip described in detail (the profiled trip) with all rural destinations visited in the past two years. While the percentages were different, the pattern of response was the same.

The next two sets of bars compare the profiled trip destinations with the ideal trip for same-day and overnight trips separately. Differences between regions actually visited and those that would be preferred were as follows:

- Fewer people would choose Alberta Central than are currently visiting locations there. This was true for same-day and overnight trips, but more so for overnight trips.
- The difference primarily benefited locations selected in Alberta South, again particularly for overnight trips.
- Although Alberta North remained far less appealing than the other regions, nevertheless it showed a substantial increase in aspiration over current behaviour, especially for same-day trips. The increases for Alberta North were at least as great proportionately as for Alberta South.

Exhibit 27: Locations in Alberta Central were chosen as ideal far less frequently than they were actually visited; Alberta South destinations gained most (Base: Total with a named rural Alberta location)



All in all, these results suggest that there is pent-up demand for leisure trips to Alberta South and, to a lesser degree, Alberta North.

The chosen locations for the ideal trips were no different than current trips in focussing almost exclusively on one region. On same-day trips, only 4% to 7% chose locations in a different region than the main destination. On trips lasting one or more nights, the percentage crossing regional boundaries was slightly higher in Alberta South and Alberta Central (6% and 8%) but quite a lot higher when the main destination was in Alberta North (19%).

The next series of charts (Exhibits 28a-e) examine the destination regions chosen for the ideal trips by region of residence. Comparisons are with all trips taken in the past two years.

- Calgary region residents chose their surrounding rural region (Alberta South) to an even greater degree than at present, with less interest being expressed in Central Alberta locations, both for same-day and overnight trips. There also appears to be potential for more travel to Alberta North on longer trips.
- Edmonton region residents indicated that an ideal trip would be less likely to have an Alberta Central destination than at present, most notably for trips lasting one or more nights. The majority of ideal overnight trips listed locations in Alberta South, almost twice the proportion that were actually taken there. This suggests that further marketing opportunities exist.
- Northern Albertans showed that they would like to take the majority of same-day trips in their own region. They were less interested in Alberta Central destinations than their current travel suggests. For overnight travel, all three regions were options.
- Central Albertans gave significantly lower support to destinations in their region, preferring to choose destinations in Alberta South for overnight stays.

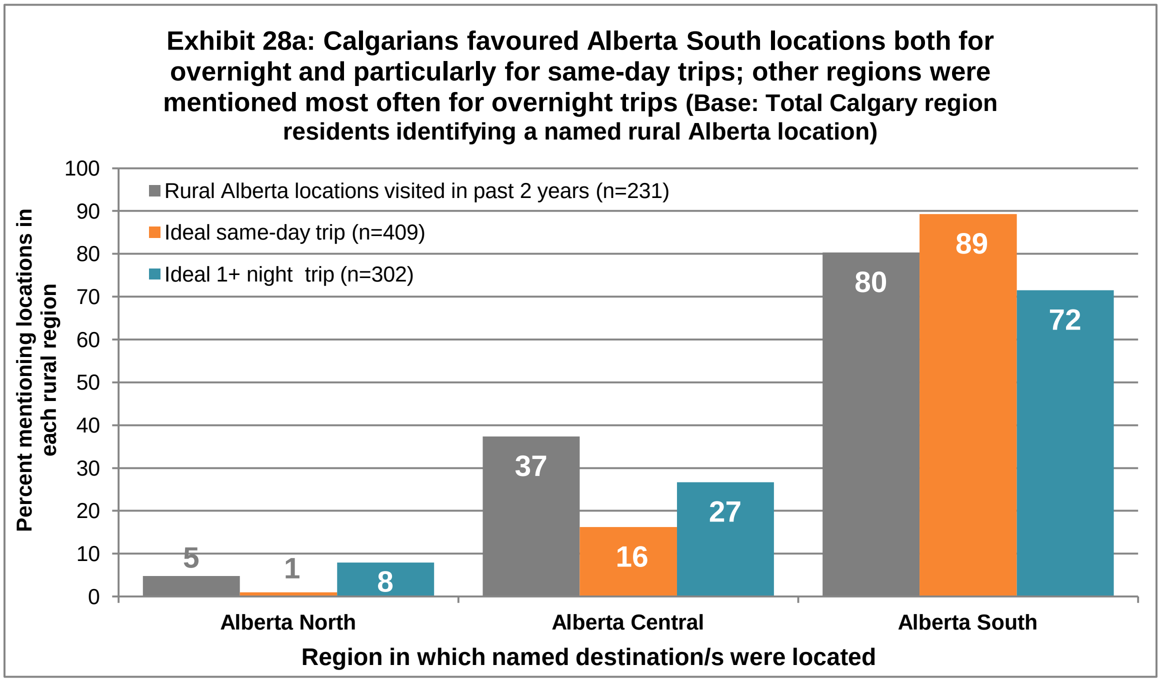


Exhibit 28a: Calgarians favoured Alberta South locations both for overnight and particularly for same-day trips; other regions were mentioned most often for overnight trips (Base: Total Calgary region residents identifying a named rural Alberta location)
Percent mentioning locations in each rural region
Rural Alberta locations visited in past 2 years (n=231)
Ideal same-day trip (n=409)
Ideal 1+ night trip (n=302)
100
90
80
70
60
50
40
30
20
10
0
5
1
8
37
16
27
80
89
72
Alberta North
Alberta Central
Alberta South
Region in which named destination/s were located

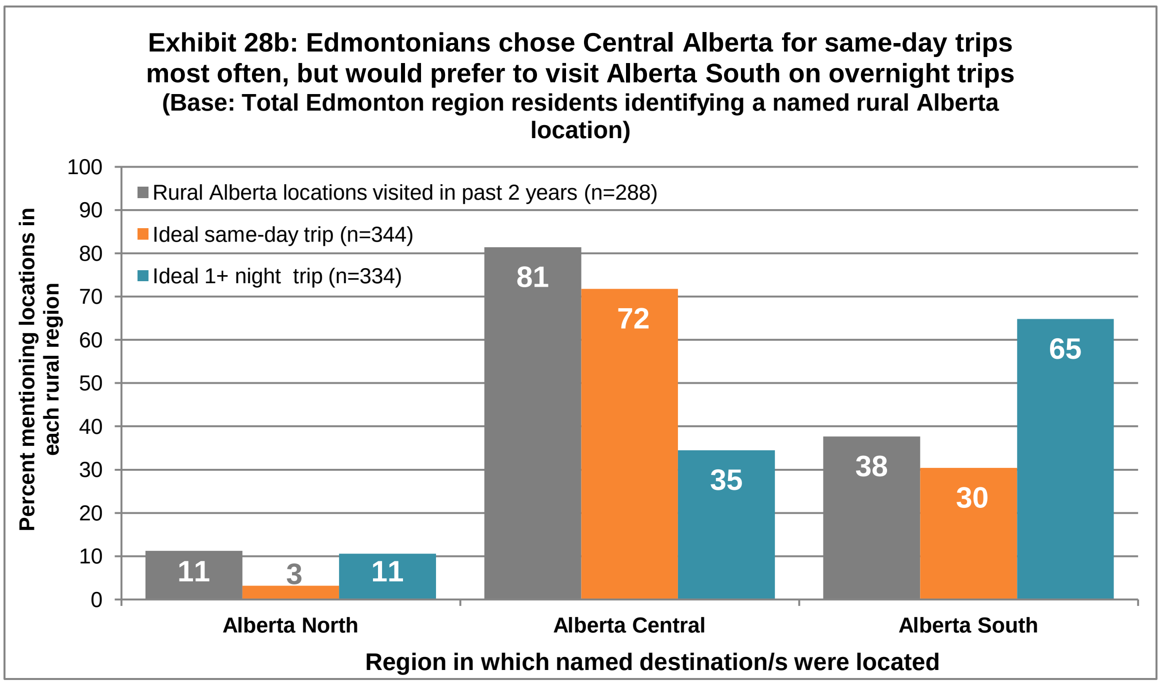


Exhibit 28b: Edmontonians chose Central Alberta for same-day trips most often, but would prefer to visit Alberta South on overnight trips (Base: Total Edmonton region residents identifying a named rural Alberta location)
Percent mentioning locations in each rural region
Rural Alberta locations visited in past 2 years (n=288)
Ideal same-day trip (n=344)
Ideal 1+ night trip (n=334)
100
90
80
70
60
50
40
30
20
10
0
11
3
11
81
72
35
38
30
65
Alberta North
Alberta Central
Alberta South
Region in which named destination/s were located

Exhibit 28c: Northern Albertans would much prefer to take same-day trips within Alberta North; overnight trips drew them to all parts of rural Alberta; preferences were very different to behaviour (Base: Total Northern Alberta residents identifying a named rural Alberta location)

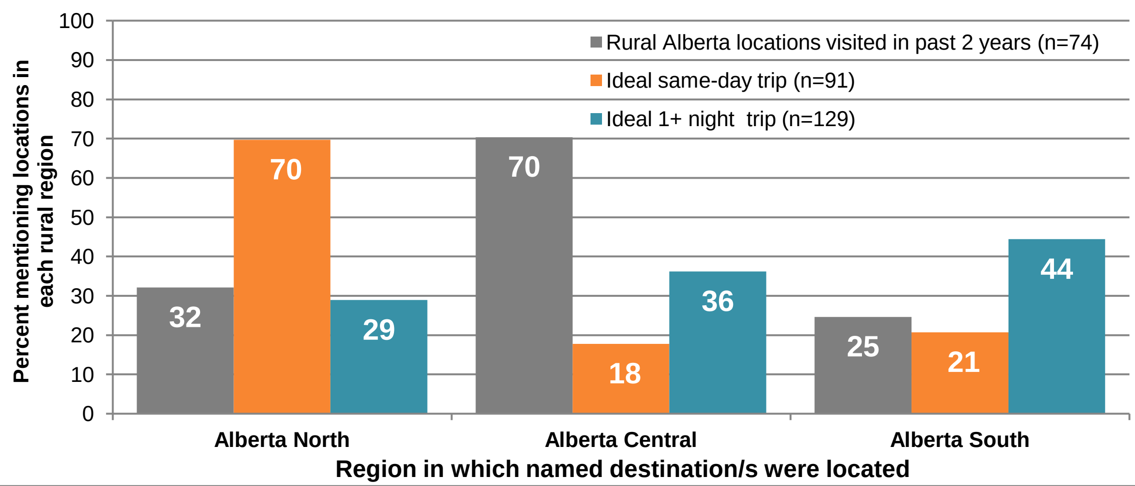


Exhibit 28d: Central Albertans were particularly drawn to Alberta South for overnight trips (Base: Total Central Alberta residents identifying a named rural Alberta location)

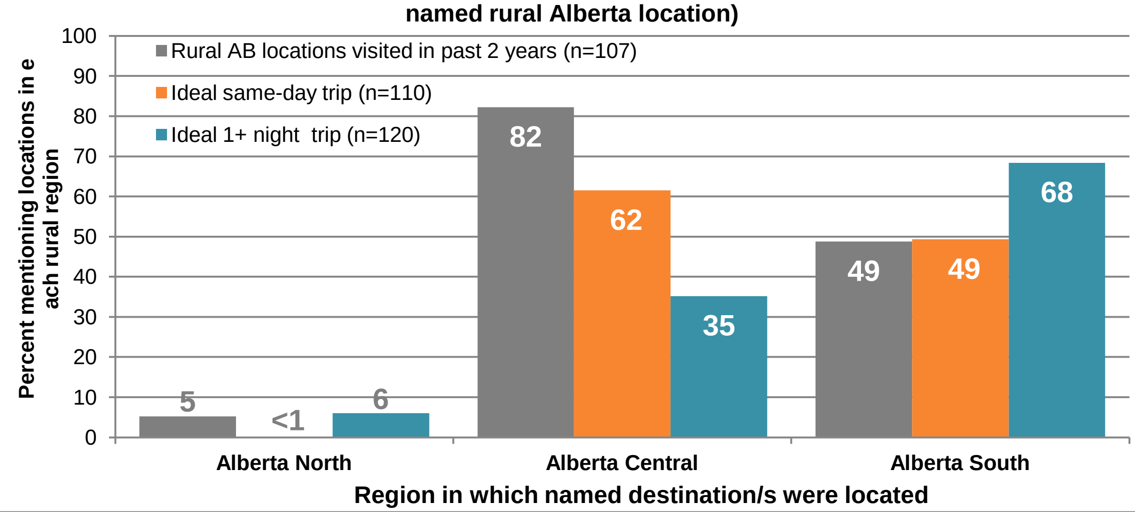
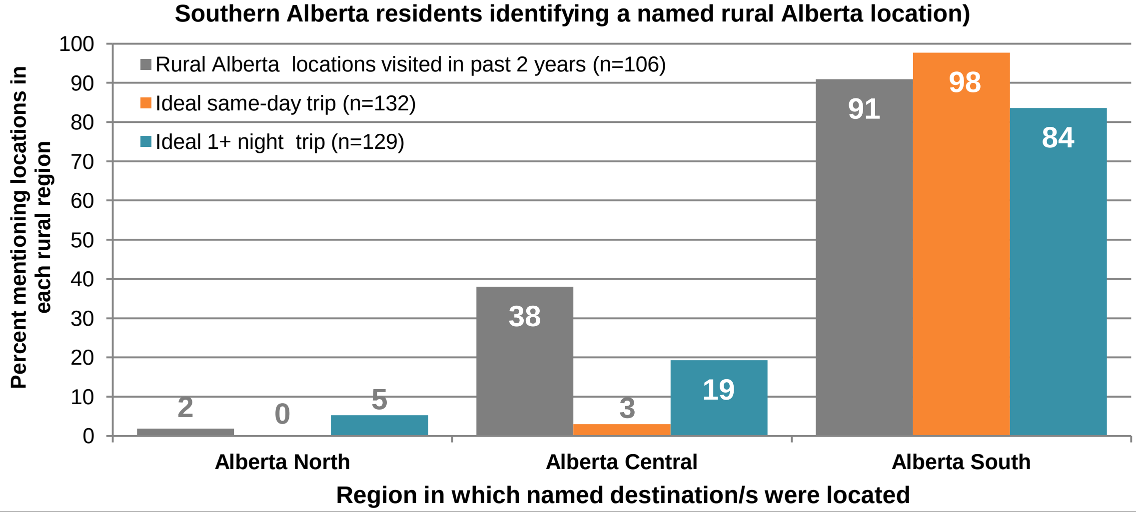


Exhibit 28e: Southern Albertans found many places to visit in their home region, whether on a same-day or overnight trip (Base: Total Southern Alberta residents identifying a named rural Alberta location)



- Southern Albertans remained perfectly happy with the locations they could visit in their home region and showed little appetite for other Alberta destinations. Discretionary overnight travel to Alberta Central, while significant, was less than is occurring at present.

Specific locations

The specific locations mentioned most often by residents of each region are examined in Exhibit 29. The results help to narrow down the list of hundreds to a few that were most popular. Some of the conclusions are:

- Drumheller was overall the most frequently mentioned destination as it was selected both for same-day and overnight trips in every region. It was mentioned most often for day-trips by Southern Alberta residents and then in the Calgary area. It was mentioned most often for overnight trips in the Edmonton region and in Northern Alberta.
- The second most popular destination was Waterton National Park. It was chosen most often by Southern Alberta residents, especially for day trips. In Calgary it was the most popular overnight trip destination, but was also viewed as appropriate for day trips. All other regions favoured Waterton for overnight trips.
- Next was Canmore, which appealed both for day and overnight trips in Calgary to the same degree. Canmore was chosen as an overnight destination in the Edmonton region, Central Alberta and Southern Alberta.
- Kananaskis was selected for both same-day and overnight trips in the Calgary region and in Central Alberta, with same-day visits being preferred in Calgary. It was frequently chosen in Southern Alberta for the ideal overnight trip.
- All other destinations were primarily regional in their drawing power:
    - Calgarians favoured same-day trips to the Royal Tyrrell Museum and Cochrane.
    - Edmontonians were particularly likely to mention Elk Island National Park for same-day trips, followed by Sylvan Lake and Camrose.
    - Southern Albertans mentioned Crowsnest Pass both for same-day and overnight trips, but particularly for same-day visits. Writing-on-Stone Provincial Park was especially popular for day trips. Brooks and Milk River were other in-region destinations mentioned relatively frequently for day trips.

- Central Albertans favoured Rocky Mountain House both for same-day and overnight trips, along with Stettler, Ponoka and Wetaskiwin for same-day trips and St. Albert for overnight trips.
- Northern Albertans identified two locations that could be ideal destinations for both same-day and overnight trips. One was Grande Cache (but especially for day trips) and the other was Two Lakes Provincial Park. Kakwa Wildland Park was a preferred same-day location, followed by Sturgeon Lake and Beaverlodge. For overnight trips, Slave Lake and Whitecourt were mentioned more often.

Exhibit 29: Ideal locations mentioned most often for same-day and overnight trips by residents of each region

	Total with a named rural Alberta location		Region of residence (Base=Residents of the region with named locations)									
			Calgary region		Edmonton region		Southern Alberta		Central Alberta		Northern Alberta*	
	Day n=1151	O/nite n=1087	Day n=427	O/nite n=334	Day n=365	O/nite n=359	Day n=139	O/nite n=130	Day n=115	O/nite n=127	Day n=104	O/nite n=137
Beaverlodge											✓	
Brooks							✓					
Camrose					✓							
Canmore	✓	✓	✓	✓		✓		✓		✓		
Cochrane			✓									
Crowsnest Pass							✓	✓				
Cypress Hills PP								✓				
Drumheller	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Elk Island NP					✓							
Grande Cache											✓	✓
Kakwa Wildland Park											✓	
Kananaskis	✓	✓	✓	✓				✓	✓	✓		
Milk River							✓					
Ponoka									✓			
Rocky Mountain House									✓	✓		
Royal Tyrrell Museum			✓									
Slave Lake												✓
St. Albert										✓		
Stettler									✓			
Sturgeon Lake											✓	
Sylvan Lake	✓				✓							
Two Lakes											✓	✓
Waterton	✓	✓	✓	✓		✓	✓	✓		✓		✓
Wetaskiwin									✓			
Whitecourt												✓
Writing-on-Stone PP							✓					

*Note: un is higher for total visiting and for most regions except Northern Alberta (un=61 for same day and 83 for overnight trips).

✓ 30% to 39% ✓ 20% to 29% ✓ 10 to 19% ✓ 5% to 9%

Mix of locations would visit on trips

The ideal trip was even more likely to include only one destination than trips taken in the past two years. 66% of ideal same-day trips and 62% of ideal overnight trips listed only one location, compared to 56% on previous trips.

For ideal same-day and overnight trips to more frequently mentioned locations, Exhibit 30 shows other places mentioned, compared to actual trips where bases permit.

- Drumheller, the most desirable rural location for same-day and overnight trips, would retain a high proportion of visitors solely at that destination once leakage to non-rural locations is excluded. Other locations with similar retention rates would include: Canmore and Sylvan Lake for both trip lengths; Waterton and Camrose on overnight trips; and Kananaskis, Elk Island and Head-Smashed-In Buffalo Jump on same-day trips.
- At the opposite end of the scale were locations that had a very high potential to be part of a trip with multiple locations. They included: “the Badlands”, Fort Macleod, Pincher Creek, Stettler and Writing-on-Stone on overnight trips, and Olds on same-day trips.
- Locations that were mentioned often on an ideal trip, but were probably “stops” along the way to another destination, included:
  - Pincher Creek, Fort Macleod, Crowsnest Pass and Writing-on-Stone, all of which mentioned Waterton as a destination on the same trip at a very high rate. Head-Smashed-in Buffalo Jump, Frank Slide and Cardston were part of this inter-related group;
  - “The Badlands” and Royal Tyrrell Museum were frequently mentioned in association with Drumheller and – to a lesser degree – with each other, while Dinosaur Provincial park was occasionally mentioned with “the Badlands”;
  - Olds was often part of a trip close to Calgary that included High River, with other frequently mentioned locations near Calgary being Black Diamond and Turner Valley, followed by Millarville;
  - The stronger relationship between Kananaskis and Canmore than vice-versa, first seen on past trips, was repeated for ideal trips; Cochrane was a potential stop on these trips;
  - In similar vein, many locations with lesser drawing power were mentioned in conjunction with Drumheller on an ideal trip, despite the

opposite not being true. They included Stettler and Head-Smashed-In Buffalo Jump in particular; also Wetaskiwin, Fort Macleod, Camrose, Sylvan Lake and Kananaskis;

- Camrose and Stettler were sometimes mentioned on the same trip, while potential Stettler visitors also listed other Alberta Central locations like Rocky Mountain House and Sylvan Lake, or Canmore and Kananaskis;

Exhibit 30: Mix of locations would visit on trips to some of the more popular rural destinations

Rural Locations: A Visited in past 2 yrs; B Same-day ideal; C Overnight ideal		Other locations would be visited by:			
		30% and over	20% to 29%	10% to 19%	No other locations*
Drumheller	A n=70			*Calgary*	47%
	B n=257				60%
	C n=198				56%
Waterton NP	A n=49		*BC* Pincher Creek Cardston	*Montana*	44%
	B n=75			Pincher Creek	48%
	C n=188				57%
Canmore	A n=54		*Banff NP*	Kananaskis	46%
	B n=82				64%
	C n=122			Kananaskis	64%
Kananaskis	A n=20	Canmore	*Calgary*		33%
	B n=70			Canmore Drumheller	60%
	C n=65	Canmore			43%
Sylvan Lake	A n=20			*Red Deer*	66%
	B n=59				66%
	C n=44			Drumheller	54%
Camrose	A n=52				45%
	B n=33			Stettler	46%
	C n=23			Stettler Drumheller	64%
Crowsnest Pass	B n=28			Waterton NP Frank Slide	46%
	C n=38	Waterton NP		Pincher Creek Frank Slide Head-Smashed-In Buffalo Jump	29%
Stettler	B n=38			Kananaskis Drumheller Camrose	29%
	C n=24		Drumheller	Camrose Canmore Rocky Mountain House Sylvan Lake	17%
Head-Smashed-In Buffalo Jump	B n=25			Nanton Waterton NP	54%
	C n=22		Waterton Drumheller	Crowsnest Pass Fort Macleod Cypress Hills PP Badlands	21%

Rural Locations: A Visited in past 2 yrs B Same-day ideal C Overnight ideal	Other locations would be visited by:			
	30% and over	20% to 29%	10% to 19%	No other locations*
			Writing-on-Stone PP	
Writing-on-Stone PP B n=22		Milk River		44%
C n=22	Waterton NP	Cypress Hills PP	Head-Smashed-In Buffalo Jump	21%
Royal Tyrrell Museum B n=42	Drumheller	Badlands		31%
Elk Island NP B n=38			Ukrainian Cultural Heritage Village Sylvan Lake	54%
Cochrane B n=30		Canmore	Stettler Sundre Kananaskis	46%
Olds B n=22	High River	Black Diamond Turner Valley	Canmore Millarville Kananaskis	17%
Nanton B n=21			Waterton Vulcan High River Head-Smashed-In Buffalo Jump Fort Macleod Claresholm	29%
Wetaskiwin B n=20			Ponoka Drumheller Leduc Reynolds Museum	36%
Pincher Creek C n=29	Waterton NP		Kananaskis Cardston Frank Slide	14%
Slave Lake C n=27				50%
Cypress Hills PP C n=26			Writing-on-Stone PP Waterton NP Head-Smashed-In Buffalo Jump	49%
Fort Macleod C n=22	Waterton NP		Head-Smashed-In Buffalo Jump Cardston Drumheller Crowsnest Pass Pincher Creek	8%
Badlands C n=21	Drumheller		Royal Tyrrell Museum	0%

Rural Locations: A Visited in past 2 yrs B Same-day ideal C Overnight ideal	Other locations would be visited by:			
	30% and over	20% to 29%	10% to 19%	No other locations*
			Head-Smashed-In Buffalo Jump Stettler Dinosaur PP	
Northern AB 3 n=21				49%

Note small bases

* Includes non-rural locations on trip taken in past two years; does not include non-rural locations for ideal trips.

- In Alberta South, Writing-on-Stone was frequently mentioned on trips that also included Milk River and Cypress Hills; another circle included High River, Nanton, Vulcan, Fort Macleod and Claresholm;
- In Alberta Central, Elk Island and the Ukrainian Cultural Heritage Village were listed together, as were Wetaskiwin and the Reynolds Museum, Ponoka and Leduc;
- No locations were profiled in Northern Alberta due to small bases. A group of respondents that simply identified "Northern Alberta" as their destination either could not or did not identify a location to visit, or individually mentioned different locations that would make up the trip.

Main trip destinations

The ideal main destinations were far more concentrated than main destinations for trips actually taken in the past two years. This may be the outcome of a lack of knowledge of the options that are available, but it does clarify what locations currently have wide drawing power in the potential market. Fewer than 10 locations were identified as main destinations for same-day and overnight trips, using a selection criterion of mention by a minimum of 2% of respondents with a named rural location. The results are shown in Exhibit 31 and are compared to the top 10 list of main destinations actually visited in the past two years. Colour is used to track locations ranked in more than one column.

Exhibit 31: Main destinations

	Profiled trip (past 2 years)	Ideal same-day trip	Ideal overnight trip
1.	Drumheller	Drumheller	Drumheller

	Profiled trip (past 2 years)	Ideal same-day trip	Ideal overnight trip
2.	Canmore	Canmore	Waterton
3.	Waterton	Kananaskis	Canmore
4.	Camrose	Waterton	Kananaskis
5.	British Columbia*	Sylvan Lake	Sylvan Lake
6.	Hinton	Elk Island NP	Crowsnest Pass
7.	Sylvan Lake	Camrose	
8.	Kananaskis		
9.	Vegreville		
10.	Wainwright		
	Range 2% to 7%	Range 2% to 20%	Range 2% to 15%

* Note: Only rural Alberta destinations were recorded for the ideal trips

The rankings show that:

- Drumheller continues to be the primary main destination in rural Alberta, whether for same-day or overnight trips.
- Canmore was the second most important main destination, with greater appeal for same-day than overnight use.
- There is pent up demand for overnight trips to Waterton and for both same-day and overnight trips to Kananaskis and Sylvan Lake, as they ranked higher in potential demand than current visitation.
- A couple of ideal main destinations – Elk Island for same-day trips and Crowsnest Pass on overnight trips – were not on the top ten list of those actually visited, indicating that they have greater potential than they are currently realizing.
- Some of the more frequent main destinations actually visited did not appear on the ideal lists. Leisure travel to Hinton, Vegreville and Wainwright may be at risk of not growing with the potential market.

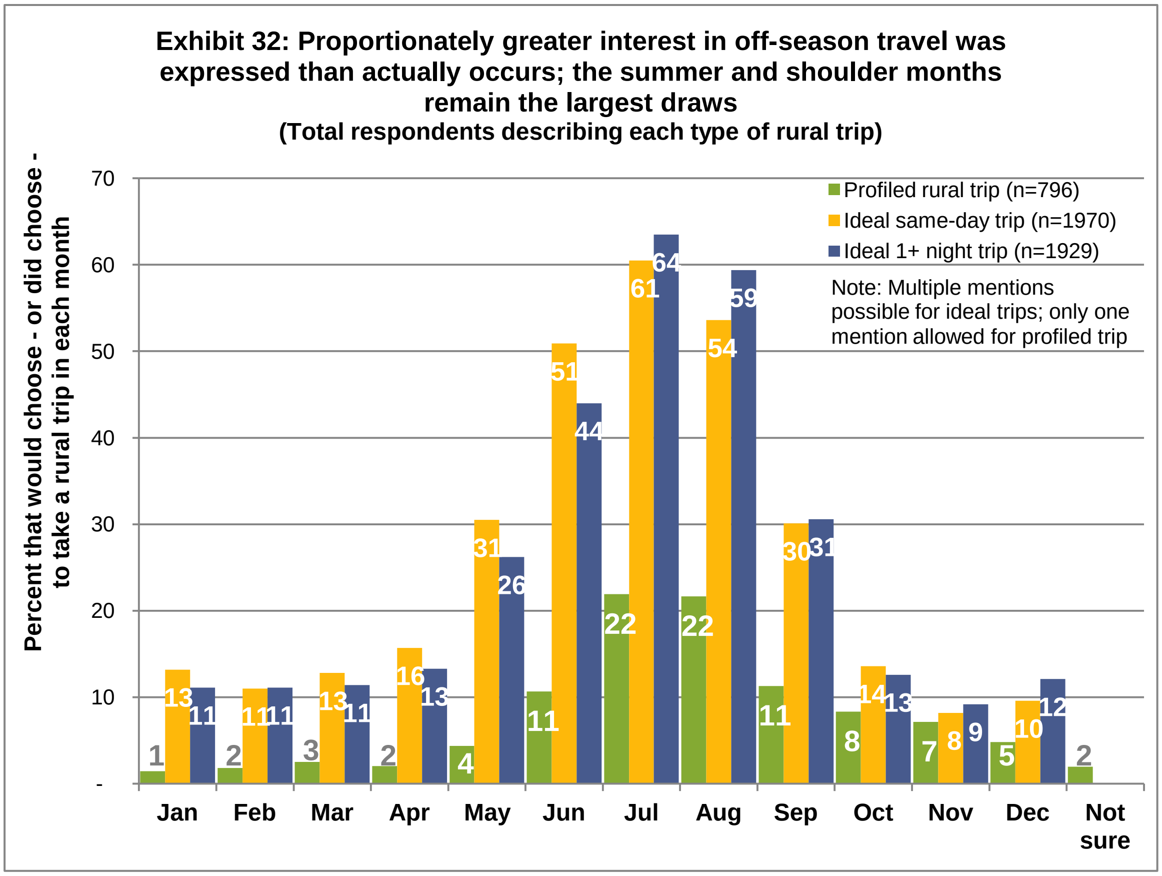
CHARACTERISTICS OF THE IDEAL TRIP

Preferred travel months

Respondents were invited to select all months with equal appeal when they would take their ideal same-day and overnight trips. The results are shown in Exhibit 32 and contrasted with the profiled trip taken in the past two years.

While the overall shapes of the distributions were very similar, there were a number of differences too:

- Overnight trips were particularly focused on the most popular months, July and August;
- In the shoulder months, May and June were selected more often for same-day than for overnight rural trips, while September was equally balanced;
- Although actual trips defined a real winter off-season from January to April, the same was not found for the ideal trips. For example, actual winter trips represented 15% of peak month travel while ideal trips in the same four months could be as high as 50% of peak month visitation. This suggests that there is greater potential for travel in the first four months of the year than actually occurs at present.
- On the other hand, desired travel in the last quarter (especially in November) was lower at about 25% of peak month travel than actual travel at almost 40%. Other factors, such as Christmas VFR trips, may stimulate rural travel that would not otherwise occur on a discretionary basis.

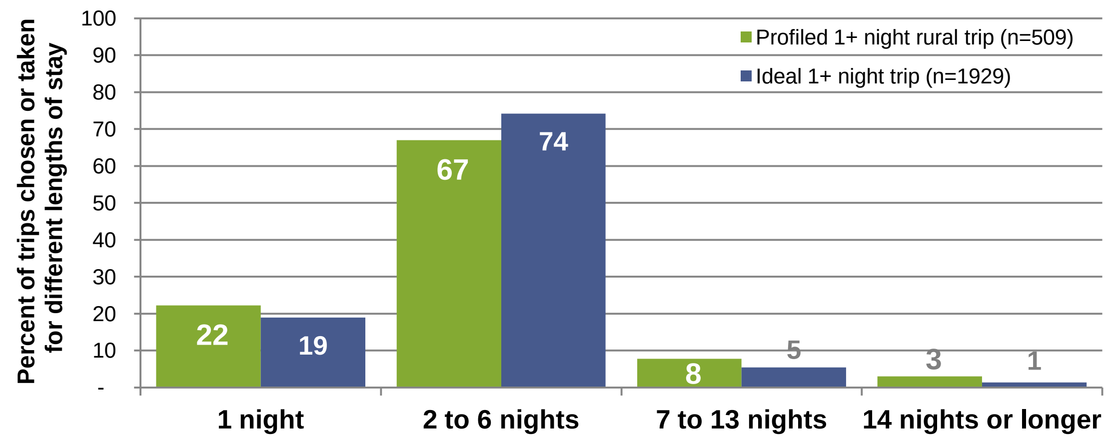


Preferred length of stay

Among respondents with an ideal overnight rural trip, the most popular length of stay – by far – was two to six nights. This corresponded well with current travel behaviour as may be seen in Exhibit 33.

Next most popular, for about one in five overnight travellers, was a stay away from home of one night. Trips to rural Alberta lasting more than a week were rarely taken and even less likely to be considered ideal.

Exhibit 33: Actual and preferred trip length corresponded, with the most popular trip being 2 to 6 nights
(Total respondents describing an overnight rural trip)



Preferred accommodation

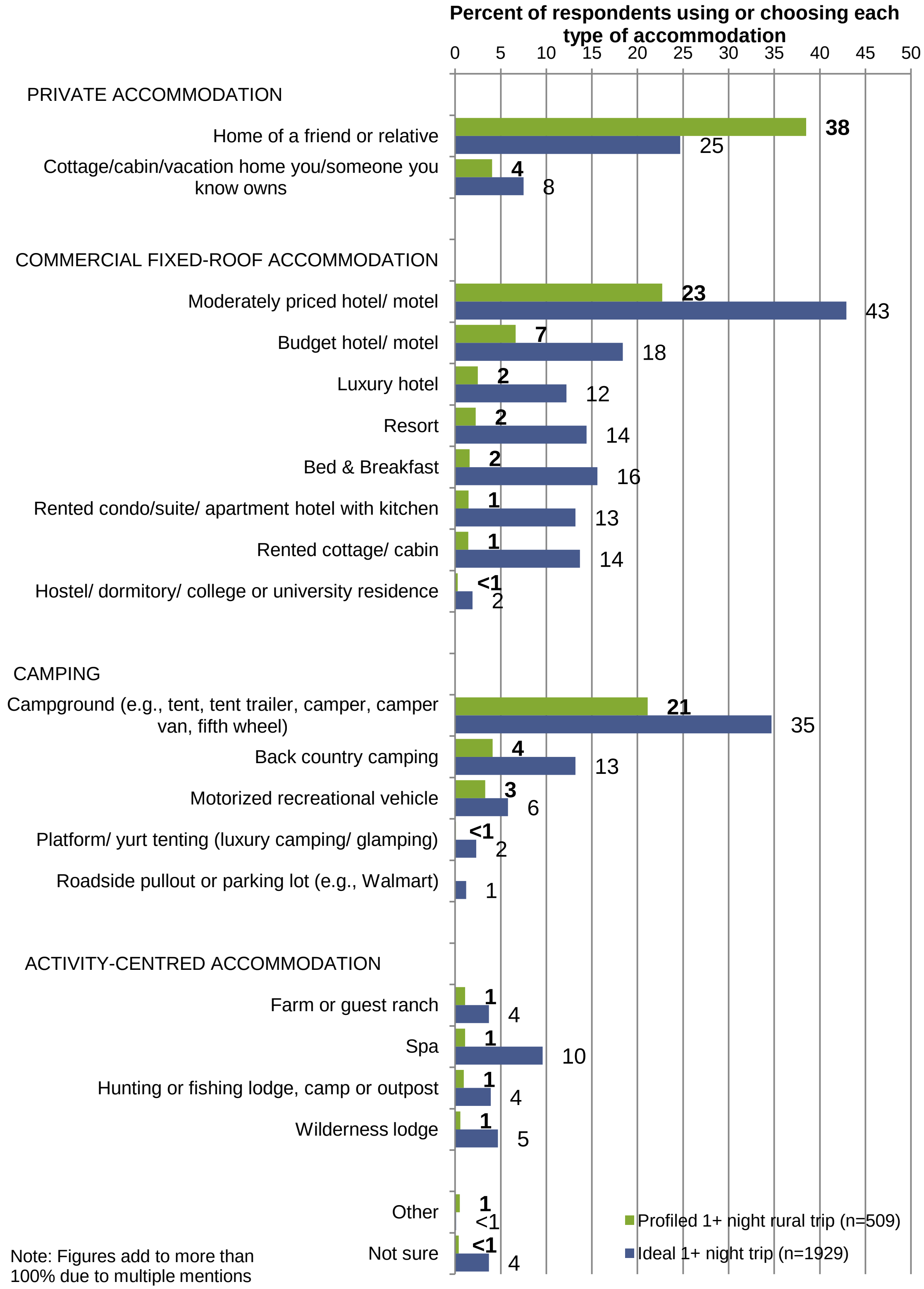
Respondents were asked to choose the type/s of accommodation they would use on their ideal overnight rural trip. The results are shown in Exhibit 34 and contrasted with behaviour on the profiled trips.

The results were interesting for a number of reasons:

- Evidently many of the respondents who had not visited rural Alberta in the past two years did not envisage visiting relatives or friends in their homes, opting instead for other forms of accommodation.
- The types of commercial accommodation they chose, however, were very similar to the types chosen by those who had visited. As a result, moderately priced hotels and campgrounds were again by far the most popular picks.
- This was followed by all types of fixed roof accommodation, with an edge to budget priced hotels/motels and Bed & Breakfast operations, cementing the preference for affordable options.
- Nevertheless, there was also a substantial core looking for luxury hotels, resorts and spas.
- The only other option chosen by 10% or more was backcountry camping.
- Other forms of accommodation, such as involved in glamping (platform/yurt tenting) or outdoor activities (farm/guest ranch, wilderness

lodge, hunting or fishing lodge, camp or outpost) were niche products at best.

Exhibit 34: Moderately priced fixed roof accommodation and campgrounds eclipsed private homes when preference was the driver
(Total respondents describing an overnight rural trip)

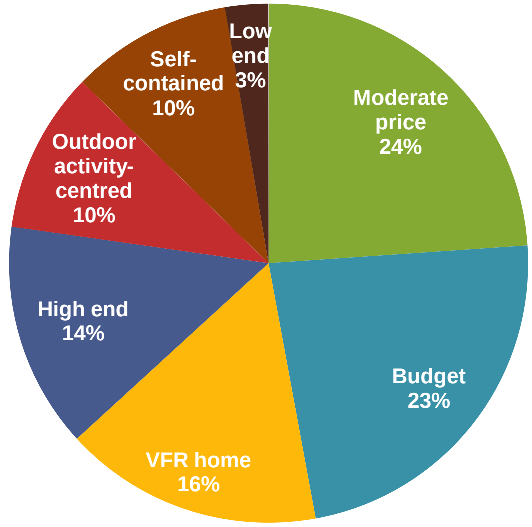


Note: Figures add to more than 100% due to multiple mentions

Factor analysis of the accommodation chosen yielded an interpretable seven factor solution that accounted for 50% of the variance. By allocating each respondent to the segment that they scored highest on, all respondents with an ideal overnight trip could be classified into one of the accommodation segments seen in Exhibit 35.

The mix of accommodation each segment favoured distinctively was as follows:

Exhibit 35: Accommodation needs segments (Base: Total respondents describing an ideal overnight rural trip n=1929)



- The largest group at 24% of potential visitors to rural Alberta simply wanted a moderately priced hotel or motel.
- Almost equally as large at 23% was the budget accommodation group. They were particularly interested in campgrounds, back country camping and, to a lesser degree, budget hotels or motels. Since the group spans two different genres, cost appeared to be the common denominator; the choice between budget fixed-roof accommodation and camping may be dependent on weather or availability in this group.
- Next largest at 16% was the group that preferred to stay at the home of a friend or relative (VFR home).
- The group looking for high end accommodation experiences included 14% of potential visitors. They tended to choose resorts, luxury hotels and spas.
- One in ten potential visitors was interested in an outdoor activity-centred experience. The types of accommodation selected included a hunting or fishing lodge/camp/outpost and a wilderness lodge, followed by platform/yurt tenting and a farm/guest ranch.
- The 10% in the self-contained group chose among all the options that provided kitchen facilities, or included food – a “home away from home”. These were, in particular, a rented cottage/cabin, a

cottage/cabin/vacation home you or someone you know owns, a rented condo/suite/apartment hotel with kitchen/cooking facilities, followed by a B&B, a motorized recreational vehicle and a farm/guest ranch.

- The small low end group at 3% of potential visitors chose a hostel/dormitory/college/ university residence or a roadside/pullout/parking lot.

Interest in travel packages or other financial incentives

Participants in the focus groups complained that coupons for use in rural areas were never published and that it was often difficult to get special rates, especially family discounts. This contention was validated earlier, where it was found that only 4% of visitors had actually used a travel package or obtained a deal of some kind.

Exhibit 36: There is strong potential for use of a travel package, special deals, coupons or discounts on rural trips that is not being realized (Total respondents describing each type of rural trip)

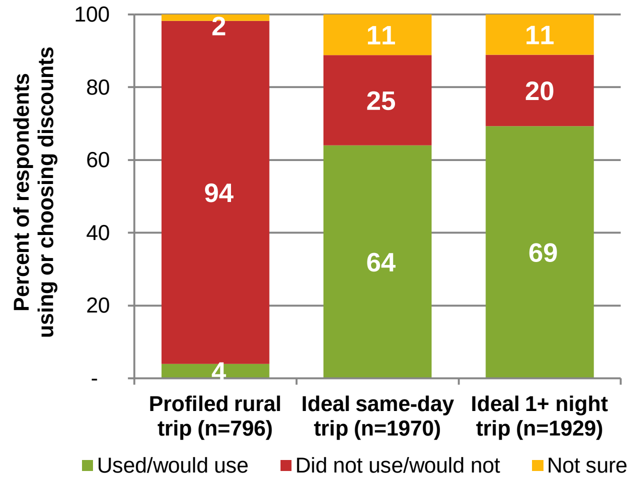


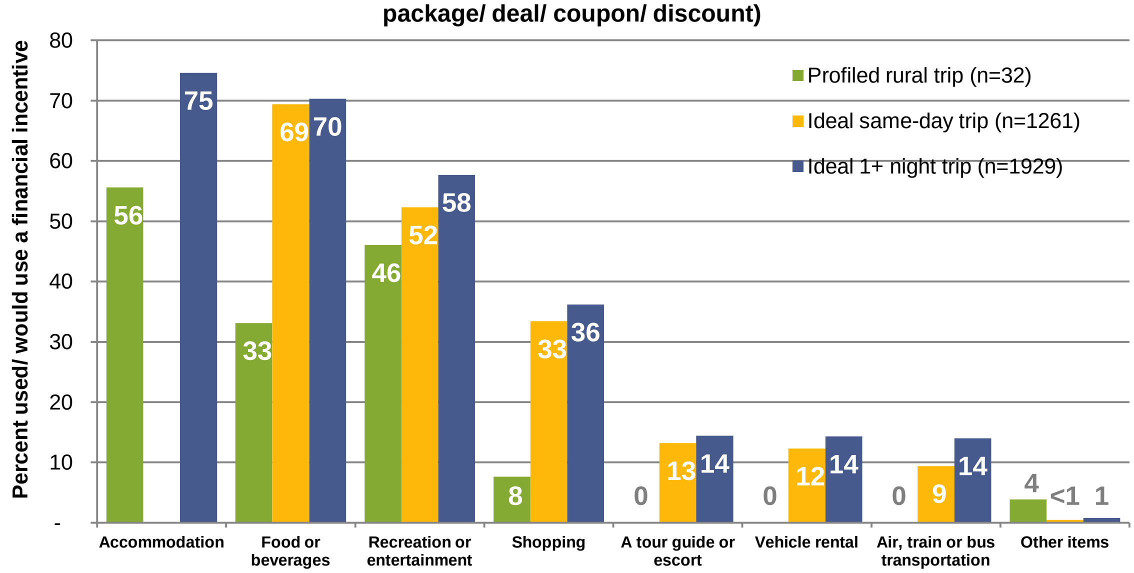
Exhibit 36 supports the focus group findings, pointing to demand by approximately two-thirds of potential travellers, slightly more often when on an overnight trip.

The products for which discounts are desired are shown in Exhibit 37. It should be noted that the results in this graph are based only on those who had used, or would like to use, financial incentives on their rural trips.

The graph shows the following:

- The proportion wanting a financial incentive for each product always exceeded the proportion that had actually used one in the past two years.
- There was little difference in demand on a same-day trip and on overnight trips, with the exception of accommodation.
- The differential between the proportion using and the proportion wanting discounts was lowest for recreation & entertainment, suggesting that these incentives are currently the easiest to find and obtain. As an informal note, it was observed that many respondents who wanted golf discounts wrote that down, wishing to identify their very specific need within the more general recreation & entertainment category.
- There is significant unmet demand for incentives for food & beverages and, on a proportionate basis, even greater unmet demand for shopping coupons or discounts.
- Incentives to use guided tours or assist with transportation costs (vehicle rental or mass transport) appealed to about one in ten potential visitors. Although a low proportion in comparison to the preceding, these could

Exhibit 37: Accommodation, food, recreation and shopping were the main incentives needed (Total respondents using or wishing to use a package/ deal/ coupon/ discount)



be vital to enticing travel across regional boundaries, especially when travel times could be reduced by mass transportation options.

- Items written in under “other” included gas discounts/free fuel and maps, brochures or information in general. These might have been selected more frequently had they been options for all respondents to consider.

Preferred experiences on trip

Many different experiences were considered by respondents when profiling their ideal same-day and overnight rural trips. One of the more important findings was that the activities chosen were very similar regardless of trip length; the main difference was that they were selected slightly more often for overnight trips.

Exhibit 38 on the next two pages shows these results and compares them to the activities actually experienced on real rural trips in the past two years. Overall, many more activities were chosen for the ideal trips than actually occur, suggesting that there is considerable potential to draw more travellers in to experience what rural Alberta has to offer.

Exhibit 38 lists activities in order by frequency of choice for an overnight trip, showing order of demand within a category. Activities done, or that were of interest at an above average rate, are shown in boldface. The table also highlights comparisons to current behaviour, that is, the activities that have greatest growth potential regardless of size.

Exhibit 38: Experiences on a rural trip

	Profiled rural trip (n=796) %	Ideal same-day trip (n=1970) %	Ideal 1+ night trip (n=1927) %
WARM WEATHER OUTDOOR ACTIVITIES*	**56**	**77**	**84**
Walking/ running	**35**	**41**	**44**
Hiking/ backpacking	**21**	**33**	**41**
Camping	**17**	12	**40**
Golfing	**9**	**19**	**23**
Horseback riding/ trail rides	3	17	**23**
Cycling/ mountain biking	6	12	17
Rock climbing	2	11	11
Off highway vehicle (ATV, quadding, 4X4)	4	7	10
Geocaching	2	7	7
Hunting	3	3	5
Motorcycling	1	4	4
Dirt biking/ motocross	0	3	3
NATURE EXPERIENCES	**35**	**66**	**74**
Visit a National or Provincial Park	**17**	**43**	**53**
See natural wonders, wildlife or scenic views	**24**	**39**	**45**
Northern lights viewing or stargazing	5	**21**	**31**
Visited a protected area	3	**21**	**27**
Birding	4	10	11
WATER-BASED ACTIVITIES	**30**	**54**	**68**
Visit/ stay at a lake, reservoir, river or stream	**16**	**29**	**43**
Swimming	**14**	**29**	**39**
Fishing	**9**	17	**24**
Canoeing, kayaking or rafting	2	15	20
Boating, sailing	4	12	18
Windsurfing, wakeboarding, waterskiing, tubing	1	7	10
PLACES, HISTORY AND CULTURE	**37**	**67**	**65**
See historical sites, museums or interpretive centres	**19**	**46**	**45**
Stroll the streets of a small town and browsed	**24**	**39**	**41**
Shop for local food or visited a food producer	**11**	**33**	**37**
Visit a community with a distinct cultural heritage	3	15	16
Experience Aboriginal culture	2	13	13
NIGHTLIFE AND ENTERTAINMENT	22	49	57
Dine out at a notable local/ home town restaurant	**16**	**38**	**43**
Go to a nightclub, lounge, pub, bar with live band, jazz club, etc.	**8**	15	**23**
Go to the movies/cinema	2	15	19
Go to a casino	1	10	14
SIGHTSEEING	23	48	54
Sightsee on a circle route, drive from one place to another, tour along historic trail	**11**	**27**	**32**
Tour backcountry roads	**13**	**23**	**28**
Aerial tours	1	14	18
Take a guided group tour, interpretive walk or	3	14	17

	Profiled rural trip (n=796) %	Ideal same-day trip (n=1970) %	Ideal 1+ night trip (n=1927) %
program			

	Profiled rural trip (n=796) %	Ideal same-day trip (n=1970) %	Ideal 1+ night trip (n=1927) %
FESTIVALS AND EVENTS	13	49	52
Attend a music festival, event or concert	3	**24**	**28**
Attend a nature-based or outdoor recreation event	2	**20**	20
Attend an agricultural festival, country fair or show, rodeo/ western themed event	2	17	17
Attend an arts or culture festival or with a regional/cultural theme	2	15	16
Watch sports event/ tournament	5	19	16
Participate in sports event/ tournament	2	9	11
ATTRACTIONS	13	51	51
See large roadside statues or other quirky attractions	**9**	**33**	**31**
Visit a theme or amusement park, a zoo, aquarium or botanical garden	4	**27**	**29**
Railway excursion or ride on historic train	2	18	**22**
Visit a corn maze	1	19	14
ARTS AND CRAFTS	12	42	45
Shop for interesting antiques, arts or crafts or other items	**8**	**23**	**24**
Attend a live theatre performance, dinner theatre or open air play	2	**20**	**23**
Visit an arts or craft gallery, studio or show	5	18	19
Arts/crafts learning experience	1	11	13
Shop for authentic Aboriginal arts and crafts	1	11	11
WINTER ACTIVITIES	6	37	40
Downhill skiing	1	9	13
Sleigh ride	<1	11	12
Tobogganing or tubing on snow	1	11	11
Ice skating	1	10	11
Snowmobiling	1	9	11
Snowshoeing	1	8	10
Cross-country skiing	<1	10	10
Snowboarding	1	8	9
Dog sledding	<1	6	8
Ice fishing	2	5	7
Ice walking/ ice climbing	1	4	4

	Profiled rural trip (n=796) %	Ideal same-day trip (n=1970) %	Ideal 1+ night trip (n=1927) %
OTHER ACTIVITIES	54	58	68
Relax	**32**	**38**	**50**
Visit friends or family	**28**	**23**	**30**
Go to a spa	2	14	**23**
Things for children to do	5	18	19
None/nothing	7	3	2
Other	<1	<1	<1

* Category totals are net (i.e., represent unduplicated mentions)
Bold figures indicate above average use or interest for each trip type individually
Experiences over-index on ideal trips compared to profiled trip: Strongly Very strongly

Some of the more striking differences in the results are described below.

- In the most popular category of warm weather outdoor experiences, dirt biking and motocross showed the largest proportional gap between doing and wanting to do. Other unmet demand was particularly evident for horseback riding/trail rides (with an above average level of interest as well) and rock climbing.
- In the nature experiences group, the idea of visiting a protected area caught the imagination of many, especially on an overnight trip. Looking at the nighttime skies (northern lights viewing or stargazing) was also more likely to intrigue on overnight trips. Both were of greater than average interest to potential visitors.
- Water-based activities that showed potential growth included canoeing, kayaking or rafting and activities like windsurfing, wakeboarding, waterskiing and tubing that create a “rush”. However, neither drew above-average interest.
- While in rural Alberta, greater potential exists to draw visitors to places that offer the ability to experience Aboriginal culture or to visit a community with a distinct cultural heritage. However, they will remain niche attractions.
- Nightlife and entertainment, an area often mentioned as needing improvement in the focus groups, could potentially draw more people to casinos and movies, especially on overnight trips.
- Preferred sightseeing options that offer greatest growth were aerial tours (hot air balloon rides, helicopter or small plane sightseeing tours) and

taking a guided group tour, interpretive walk or program. Both are likely to continue to attract relatively small proportions of all visitors.

- Almost all types of festivals and events held in rural areas have the potential to grow their urban audiences.

  Most popular, and with greatest potential for overnight trips, were music festivals, events or concerts. Nature-based or outdoor recreation events (examples given included a wildflower festival, sand castle or ice sculpture contest, air show, demolition derby or mud bog) proved almost as popular and had major growth potential as well.

  Agricultural festivals, country fairs or shows, rodeos and western themed events as well as arts or culture festivals, or festivals with a regional/cultural theme, could attract many times more people than visit at present, though they would remain less widely attended than average.

  The remaining event types were both sports related and while they clearly could increase attendance, they would not experience the same order of magnitude gains.

- Several arts and crafts experiences could significantly improve the number of people they draw. They included in particular, an arts/crafts learning experience such as a photo safari, fine arts camp, workshop learning to make pottery, etc. and attending a live theatre performance, dinner theatre or open air play. Growth potential over current behaviour was also evident for shopping for authentic Aboriginal arts and crafts. Of these, only live performances have major potential; the others offer niche market experiences.

- Higher potential was evident for the entire category of winter activities as a whole; however, there was no one single experience that could act as a catalyst by creating above average levels of interest. Instead, almost every activity other than the more prevalent ice fishing showed considerable increased potential, most notably dog sledding, cross-country skiing and sleigh rides, followed by snowboarding and tobogganing or tubing on snow.

- Among the group of “other” activities, it appears that visiting a spa in a rural area would have growing – and above average – appeal, particularly on an overnight trip.

One thing Exhibit 38 does not highlight is the occasions where an experience was more likely to be seen as suitable for a day trip, than an overnight trip.

The few activities like this included: visit a corn maze, do nothing at all and watch a sports event or tournament.

Additional insight into the differences between same-day and overnight trips may be gained by examining the top 15 activities chosen for each type of trip (Exhibit 39). Most of the activities currently undertaken on rural trips were also desirable activities on an ideal trip. However, the order of popularity differed, and in some cases different activities made the top 15 list.

- VFR was far more important on current trips where it was mentioned as the most frequently done activity. VFR ranked #15 for ideal day-trips and did not make the list at all for ideal overnight trips. This result changes how time can be spent by people without personal ties who make a trip to rural Alberta.
- Both ideal trips placed much more emphasis on sightseeing, with visits to national or provincial parks heading the overnight list and ranking second on same-day trips. Probably as a result, seeing natural wonders, wildlife or scenic views ranked slightly higher than for the profiled trip too.

  In addition, both ideal trips included walking/running, swimming and sightseeing (on a circle route, driving from one place to another or touring along an historic trail) in the top 15 list.
- Another gap between current trips and those that could potentially materialize in the future was greater emphasis on seeing historical sites, museums or interpretive centres. Historic attractions ranked very highly for both ideal trips (#1 for same-day trips and #3 for overnight trips), compared to #7 on the profiled trip.
- Ideal same-day trips appeared to include more attractions or to rank them more strongly than overnight trips. Large roadside statues and other quirky attractions ranked far higher, while visits to a theme or amusement park, zoo, aquarium or botanical garden, or attending a music festival, event or concert, only appeared on the same-day list.

  Same-day trips also ranked strolling the streets of a small town and browsing, or shopping for local food/visiting a food producer higher than for overnight trips.

Exhibit 39: Top 15 activities selected on rural trips

Rank	Profiled rural trip (n=796)	Ideal same-day trip (n=1970)	Ideal 1+ night trip (n=1927)
1	Walking/ running	See historical sites, museums or interpretive centres	Visit a National or Provincial Park
2	Relax	Visit a National or Provincial Park	Relax
3	Visit friends or family	Walking/ running	See historical sites, museums or interpretive centres
4	Stroll the streets of a small town and browse	See natural wonders, wildlife or scenic views	See natural wonders, wildlife or scenic views
5	See natural wonders, wildlife or scenic views	Stroll the streets of a small town and browse	Walking/ running
6	Hiking/ backpacking	Dine out at a notable local/ home town restaurant	Visit/ stay at a lake, reservoir, river or stream
7	See historical sites, museums or interpretive centres	Relax	Dine out at a notable local/ home town restaurant
8	Camping	Shop for local food or visited a food producer	Stroll the streets of a small town and browse
9	Visit a National or Provincial Park	See large roadside statues or other quirky attractions	Hiking/ backpacking
10	Dine out at a notable local/ home town restaurant	Visit/ stay at a lake, reservoir, river or stream	Camping
11	Visit/ stay at a lake, reservoir, river or stream	Swimming	Swimming
12	Swimming	Visit a theme or amusement park, a zoo, aquarium or botanical garden	Shop for local food or visited a food producer
13	Tour backcountry roads	Sightsee on a circle route, drive from one place to another, tour along historic trail	Sightsee on a circle route, drive from one place to another, tour along historic trail
14	Sightsee on a circle route, drive from one place to another, tour along historic trail	Attend a music festival, event or concert	Northern lights viewing or stargazing

15	Shop for local food or visited a food producer	Visit friends or family	See large roadside statues or other quirky attractions

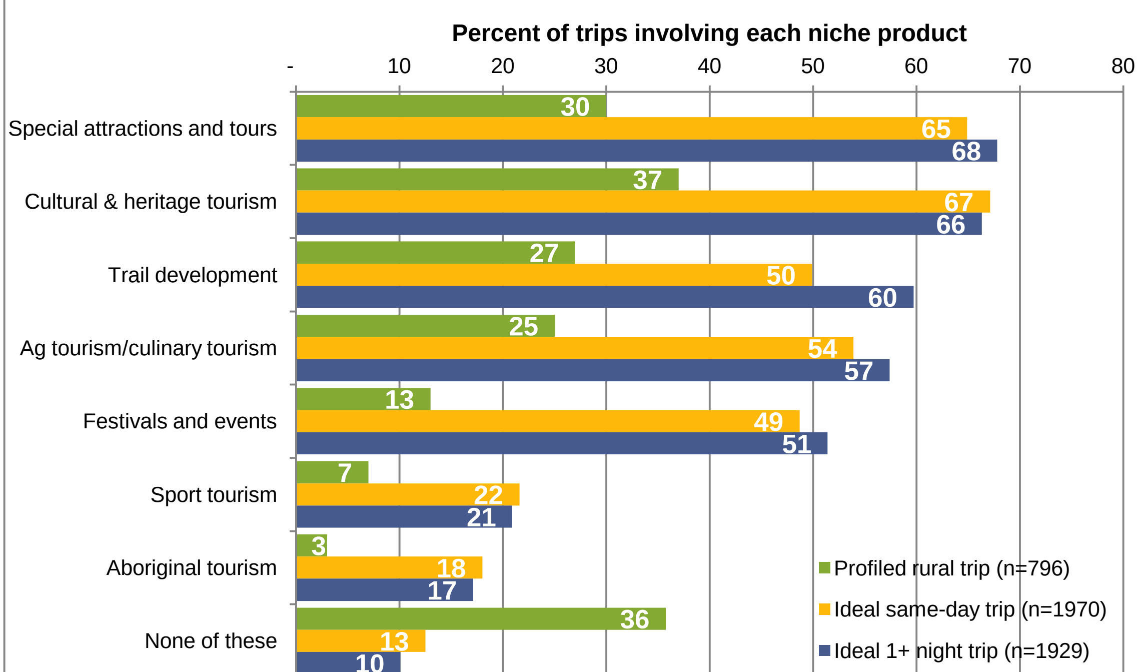
All of these findings suggest that same-day trips were viewed as busy days that would involve taking in at least one attraction.

- On the other hand, ideal overnight trips appeared to place greater emphasis on relaxing and being in an environment conducive to doing that. For example, visiting or staying near a water body and camping ranked higher for overnight trips.

  This scenario appears to be consistent with overnight trips' top 15 ranking for hiking/ backpacking and northern lights viewing or stargazing, neither of which were on the same-day trip list.

Select activities were again combined into different groups representing niche product areas. The results for these groupings are shown in Exhibits 40 and 41. Of the seven groups, five appear to have the potential to meet high demand from future visitors – special attractions and tours, culture and heritage tourism, trail development, ag/culinary tourism and festivals and events. Among these, festivals and events would involve the greatest change over current travel behaviour, consistent with the demand for more attractions when VFR becomes less of a factor in determining rural experiences.

Exhibit 40: Preferred activities on a rural trip suggest that five product areas have greatest potential for development
(Total respondents describing a rural trip)



While most products were in similar demand for same-day and overnight trips, trail development appeared to have greater alignment with longer trips. Finally, it should be noted that Aboriginal tourism, while remaining a small niche product, has the highest growth potential.

Exhibit 41: Niche product development opportunities

	Profiled rural trip (n=796) %	Ideal same-day trip (n=1970) %	Ideal 1+ night trip (n=1929) %
SPECIAL ATTRACTIONS AND TOURS*	**30**	**65**	**68**
Sightsee - circle route, drive from place to place, tour historic trail	11	27	32
See large roadside statues or other quirky attractions	9	33	31
Visit a theme park, zoo, aquarium or botanical garden	4	27	29
Tour backcountry roads	13	23	28
Railway excursion or ride on historic train	2	18	22
Take a guided group tour, interpretive walk or program	3	14	17
Aerial tours	1	14	15
Visit a corn maze	1	19	14
Geocaching	2	7	7
CULTURE AND HERITAGE TOURISM	**37**	**67**	**66**
See historical sites, museums or interpretive centres	19	46	45
Stroll the streets of a small town and browse	24	40	41
Attend a music festival, event or concert	3	24	28
Shop for interesting antiques, arts or crafts or other items	8	23	24
Attend a live theatre performance, dinner theatre or open air play	2	20	23
Visit an arts or craft gallery, studio or show	5	18	19
Visit a community with a distinct cultural heritage	3	15	16
Attend an arts or culture festival or with a regional/cultural theme	2	15	16
Arts/crafts learning experience	1	11	13
TRAIL DEVELOPMENT	**27**	**50**	**60**
Hiking/ backpacking	21	33	41
Horseback riding/ trail rides	3	17	23
Cycling/ mountain biking	6	12	17
Snowmobiling	1	9	11
Off highway vehicle (ATV, quadding, 4X4)	4	7	10
Cross-country skiing	0	10	10
Dog sledding	0	7	8
Dirt biking/ motocross	0	3	3
AG TOURISM/CULINARY TOURISM	**25**	**54**	**57**
Dine out at a notable local/ home town restaurant	16	38	43
Shop for local food or visit a food producer	11	33	37
Attend an agricultural festival, country fair or western event	2	17	17
Visit a corn maze	1	19	14

	Profiled rural trip (n=796) %	Ideal same-day trip (n=1970) %	Ideal 1+ night trip (n=1929) %
FESTIVALS AND EVENTS	13	49	51
Attend a music festival, event or concert	3	24	28
Attend a nature-based or outdoor recreation event	2	20	20
Attend an agricultural festival, country fair or western event	2	17	17
Watch sports event/ tournament	5	19	16
Attend an arts or culture festival	2	15	16
Participated in sports event/ tournament	2	9	11
SPORT TOURISM	7	22	21
Watch sports event/ tournament	5	19	16
Participate in sports event/ tournament	2	9	11
ABORIGINAL TOURISM	3	18	17
Experience Aboriginal culture	2	13	13
Shop for authentic Aboriginal arts and crafts	1	11	11

* Category totals are net (i.e., represent unduplicated mentions)

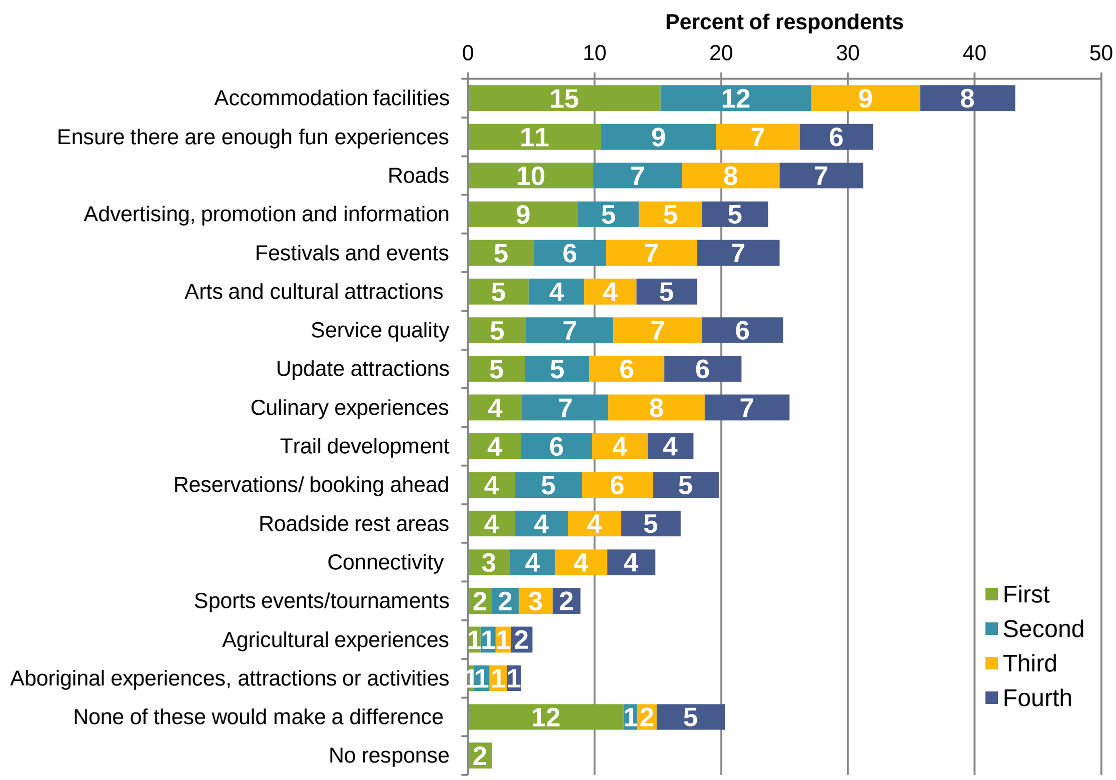
OPPORTUNITIES FOR IMPROVEMENT

Most important items

A number of unmet visitor needs that offered opportunity for product development and education or promotion were identified during the focus groups. These needs, together with the niche product areas, were presented to respondents to rank for importance: “Which of the following are the four most important features or activities to increase or improve at Alberta locations outside the larger cities and Banff/Jasper National Parks? Please choose features that would make you want to travel more often, or stay longer.”

The results are shown in Exhibit 42 ranked in first choice order. This was not always the same as the total for all four choices, so both findings need to be considered. The results may be somewhat surprising.

Exhibit 42: Improving accommodation was the only standout feature selected for improvement; most others had a notable base of proponents (Base: Total respondents n=2400)



- The most frequently chosen item for improvement was accommodation, both as the first choice and in each subsequent rank. The full description of accommodation was, "Accommodation facilities (e.g., campground availability, crowding and rules/restrictions; availability and quality of hotels and motels, cabins, B&Bs; amenities offered or costs)". The examples were mainly drawn from discussions held in the focus groups. Given the amount and variety of suggestions for improvement heard in the focus groups, its leading position may not come as a surprise.
- Next in importance were three very different items.
  - First was, "Ensure there are enough fun experiences (e.g., enough to do in daytime and to entertain at night; offer exciting, adventurous or challenging activities)". Given the number of specific experiences that were included on the list as options for ranking, the high rank is important because it emphasizes the need to have enough to do rather than being at a loss and bored while on a rural trip. It means that these respondents were open to suggestions, not seeking out pre-selected activities. It also implies that they need to be convinced that there *is* enough to do.
  - The second item in the set was rural roads: "Roads (e.g., road surface and condition, finding your way)". While there had been considerable discussion about rural roads in the focus groups, their rank in the category of secondary items may be something of a surprise … and a barrier not easily overcome.
  - Advertising, promotion and information (e.g., need to know more about where to go, what is special and why, what else there is to see and do, how to get there, what facilities/ amenities/ supplies are available, etc.) ranked third in this group based on its "most important" ranking, but not overall. However – as will be seen when the spontaneous suggestions for improvement of each item are reviewed – information and promotion were mentioned as being needed to improve almost every other item on the list. Since those were mentioned by different respondents, they ultimately elevated the importance of the need for advertising, promotion and information, cementing it in the secondary group, even though it did not initially match the total top 4 rank of the other two items.
- The remaining items were quite mixed as they varied little in being selected as most important to improve. This result indicates that there is no magic wand, but that work will be needed on multiple fronts to improve the rural product if it is to entice more travel.

- Nonetheless, when total selection as one of the top 4 is considered, several items did emerge as being slightly more important. They included two products on niche product list.
    - Culinary experiences (e.g., improve quality, variety or availability of places to purchase or pick fresh local food ingredients, sample local specialities at restaurants or tea houses, attend a food fair or festival, tour a winery, etc.)
    - Service quality (e.g., service staff attitudes and skills; hours of operation of restaurants, bars, laundromats or stores)
    - Festivals and events (e.g., improve quality, variety or availability of nature-based or outdoor recreation events, arts, cultural or music festivals, etc.)
    - Update attractions (add new features or exhibits, provide a reason to visit again; modernize or refresh older facilities)
- The only other notable results of the ranking were three items where improvement would be least likely to influence travel: Aboriginal experiences, attractions or activities, agricultural experiences and sports events/tournaments. And for just over one in ten respondents, none of the suggested changes could do that.

Overall, the ranks point to a gap between what urban travellers want and need and what rural Alberta is perceived to provide. The items mentioned more often related to infrastructure and support services rather than to particular types of experiences, themes, attractions or events. Among the latter, however, the current trend to tasting and enjoying local food is clearly having an impact, while festivals and events appear to be the category with the greatest potential to attract visitors. They were particularly likely to be music based, rather than agricultural.

Accommodation

The question now is, what were respondents thinking of when they selected an item as being in need of improvement? For each item ranked most important to change, respondents were asked, "What specifically could be improved about … at Alberta locations outside the larger cities and Banff/Jasper National Parks?" The responses for top ranked accommodation facilities are shown in Exhibit 43.

From the responses it is evident that, first and foremost, both quality and price appear to need attention ("Cost is often too high! Quality of accommodation is often too low"). Respondents wanted to see higher standards of ongoing maintenance and more attention paid to updating the more decorative elements in fixed roof accommodation ("They could be a lot more attractive and stylish. Many also need some serious updating/maintenance"). On the cost side, their need for affordability and value is totally consistent with their accommodation picks for the ideal overnight trip, whether hotels or campgrounds ("Great rates to stay and coupons for local attractions").

Far fewer – but still a substantial number – were looking for more choice in price or type of accommodation, often higher end options like resorts and luxury hotels, also family friendly hotels, rooms with multiple private bedrooms, B&Bs, budget hotels and motels, well-known chains, cabins, or simply something "less rustic".

Two of the response themes dealt with campgrounds specifically. The main one addressed the need for more and better amenities in the campgrounds ("1. Showers at campgrounds 2. Clean facilities 3. Security e.g., control drunks, dogs"). The second addressed concerns about the lack of availability of campsites. Without the ability to book ahead, uncertainty about whether a site would be available was reported to be a barrier to visiting at all ("Being able to book ahead and reserve a camp spot, not have to go and then try somewhere else because there are not camp sites available but you could not find out ahead of time").

Exhibit 43: Improvements needed for rural accommodation

	Total choosing this item n=364 %
Better quality accommodation needed/ better standards/ cleaner/ well maintained/ newer/ updated/ more stylish	24
Price/ low cost accommodation/ more affordable/ better value/ include incentives	21
Campsite amenities/ pull through RV lots/ tent friendly/ showers/ security/ clean/ more washrooms/ hookups/ trees for privacy/ free firewood/ better boat launches	11
Better variety of accommodation /choice/ specific types needed/ wider range of prices/ more upscale/ more family	11
Availability/ accommodation needed on short notice/ more	9

	Total choosing this item n=364 %
accommodation needed	
More advertising needed/ honest/ accurate prices/ more online information required/ better access to information/ easy to find	9
More campgrounds/ sites needed/ able to book ahead/ drop in	7
Programs/ attractions/ activities/ amenities on or off site	6
Friendly/ better customer service/ more knowledgeable staff	4
Easier to book/ in advance/ online booking information/ reservations	3
Pet friendly	1
Need to feel safe secure/ better security	1
Have no complaints	1
Other	5
No response/ don't know	12

The issue of space shortage and booking ahead extended to fixed roof accommodation. There was a belief that more accommodation was needed since it isn't always available, especially not on short notice ("More of them, really hard to find accommodations if you are just driving through and need a place to stop and sleep for the night").

There was also an expressed desire for improved booking procedures, including online reservations, but this was not the dominant issue in the accommodation group since it was a separate item in the list of potential improvements. Improved customer service was another less frequent suggestion as it was also included separately on the list of improvements.

Programs, attractions, activities and amenities on or off-site should be offered and information on them provided. This would be another improvement that would help to address the fear that they would miss something in an unfamiliar area or not have enough to keep them pleasurably occupied.

The final set of suggestions dealt with improving communication about accommodation options, including easily found information, whether through advertising or online. Honest portrayal of the facility and accurate pricing were particular concerns ("Online listings of facilities available, accurate prices, and ability to book online").

Ensure there are enough fun experiences, roads, advertising, promotion and information

ENSURE THERE ARE ENOUGH FUN EXPERIENCES

Exhibit 44 shows the responses received when asked what could be improved to ensure there are enough fun experiences. It is particularly interesting that a frequent answer was “tell us about them!” (“For most places there isn’t enough info on things to do for out of town people. Most places there are enough fun experiences but only people who live there know”). More specifically, respondents suggested more advertising, more cohesive information and better on-site signage (e.g., billboards, road signs) on what was available at the destination.

Exhibit 44: Improvements needed for ‘fun experiences’

	Total choosing this item n=253 %
More advertising/ information/ signage on what is available	19
More activities needed/ develop new experiences/ enough things to do/ things to fill the day	16
Family friendly activities/ more/ enough things for children/ whole family/ all ages	11
More festivals/ live performances/ theatre/ fairs/ concerts	9
Restaurants/ food experiences/ entertainment	8
Accessibility/ activities within a reasonable distance/ day trips/ good road conditions	7
Cost/ reasonably priced activities/ affordable for family/ value for money/ coupons/ free things	5
Something that is unique/ different/ worthwhile	4
Enough/ better accommodation/ camping facilities	2
Hours of operation/ better customer service/ update facilities	2
Other specific activities suggested	13
Other	6
No response/ don't know	16

Overall, there were many suggestions for fun experiences, more that were non-specific, but some that were very specific. They included:

- More activities, including new experiences, are needed to fill the day (“My kids can't be bored … neither can I, come to think of it” and “If there is only one thing in a town that I want to see it will probably take longer for me to get around to going; while if there were several things I want to see I would make a weekend trip of it”).

- Activities should be family friendly, which means they need to engage children of all ages *and* the adults with them who also want to have fun (“Have different things for the whole family to enjoy, kid friendly adult experiences”).
- Festivals, live performances, fairs and concerts were the most frequently suggested type of attraction, but many different ideas for activities were put forward by only a few people each.
- A small group made the point that to entice them out of the city, the experience would have to be different or unique in some way, to make it feel like a worthwhile trip.

Interestingly, even though the question asked for suggestions to improve fun experiences, quite a few respondents expressed concern about the availability of supporting infrastructure on a trip to enjoy such experiences. The concerns included:

- Restaurants, food and the dining experiences available;
- Accessibility of the location, including distance, road conditions and whether it could be reached on a day trip;
- Reasonableness of costs or affordability and incentives to make them more palatable;
- Availability of accommodation;
- Hospitality, as evidenced by hours of operation, customer service, cleanliness and appearance of the facilities.

Roads

Respondents who chose improved roads as the primary barrier to increasing their rural visitation were unequivocal about the major improvement that was necessary: improved road surfaces. They suggested that “rough” roads needed paving, repaving, regrading, maintenance, pothole and crack repair and repair of damage resulting from winter heave. A small group also suggested better management of winter road conditions, including snow and ice clearing, sanding and salt application (Exhibit 45).

One of the outcomes of poor quality roads was a less comfortable ride, especially on motorcycles and when towing a trailer ("Some of the roads have potholes and have been patched so often that the patches have patches and are like driving on a washboard").

Safety (i.e., chance of collisions, especially fatal ones) emerged as a theme also addressed by specific suggestions for improvement, including:

- Good signage and road markings, including clearer signs and more frequent speed posts;
- Reduction of speed limits and/or better enforcement of these limits;
- Better lighting at night; and
- Both general and specific suggestions to make the roads safer, with one example being the use of lane reflectors in the absence of lighting.

Exhibit 45: Improvements needed for rural roads

	Total choosing this item n=236 %
Road surface/ rough/ pave/ repave/ regrade/ maintenance/ repair pot holes/ cracks/ winter heave	52
Prefer twinned highways/ more lanes/ widen highways/ wider shoulders/ passing lanes	21
Good/ clear signage/ directional signs/ speed posting/ better road markings	10
Seasonal road conditions/ snow/ ice clearing/ sanding/ salt	7
Make roads safer (e.g., lane reflectors)	6
Construction on highways slows traffic/ causes delays/ less detours/ accommodate traffic	4
Reduce speed limits/ enforce	4
More washrooms/ rest areas required/ pulloffs/ roadside turn	1
Better lighting at night	1
Roads are good	2
Other	8
No response/ don't know	6

Two other factors about rural roads work to reduce tourism. The more important one was the expressed preference by over 20% for twinned highways, more lanes, wider roads and shoulders and more passing lanes.

This type of road design would make for safer and easier driving. The preference clearly inhibits access to many rural areas.

The second and less frequently voiced concern was with road construction and detours. This causes delays and is not compatible with day trips when travel time needs to be minimized.

ADVERTISING, PROMOTION AND INFORMATION

One of the major improvements to advertising, promotion and information on travel to rural areas was that there should be more of it (Exhibit 46). Two items described this response. One involved comparisons with the amount of advertising and promotion seen for Calgary, Edmonton, Banff and Jasper, with many claiming that they do not know what else there is to see and do in Alberta outside the cities ("Most promotion focuses on the mountains and the large cities. There is little known about the smaller communities").

The second set of responses included more general statements about the need for more information that is easier to access, preferably arriving on their own doorsteps ("Be specific about what there is to that area - for example: Tourism Alberta Just breathe series - they look beautiful and I would love to check these out, but I am lazy by nature. SPELL it out to me like I'm a moron. Tell me where it is, how to get there and what else is there").

In smaller category, specific mention was made that promotions need to be timely so that plans can be made; apparently all too often people hear about an event after it has occurred.

Exhibit 46: Improvements needed in advertising, promotion and information

	Total choosing this item n=209 %
ADVERTISING, PROMOTION AND INFORMATION	
Describe hidden treasures/ what makes area special/ unique activities/ attractions/ more information on things to do/ see/ be specific	26
More advertising and promotion needed on smaller sites/ locations outside city/ people need to know what is out there/ not always the larger areas	22
More advertising needed/ better information/ easier to find/ get it to	18

	Total choosing this item n=209 %
me	
More/ wider promotion of events/ what is going on/ when/ events calendar/ more comprehensive listing	9
Need coupons/ discounts/ specials/ contests/ prizes/ promotions/ all-inclusive packages	8
Road directions/ circle routes/ access from major points / best time to travel	5
Need information in a timely/current manner/ up to date/ post what is new	4
More information needed about community amenities like groceries/ libraries/ restaurants/ shopping/ accommodations/ hours of operation/ cost	3
MEDIA	
Comprehensive website/ better/ more online information/ advertising/ greater use of social media	13
More TV commercials/ features	8
More billboards/ signage/ hoardings/ bus	5
More mail outs/ better/ flyers/ brochures	4
More radio ads	3
More magazine ads	2
More newspaper ads	2
Create an app	<1
Any reference to Travel Alberta 'remember to breathe' ads/commercials	2
Other	11
No response/ don't know	10

Another large group of responses was more specific about what should be promoted or what information should be provided:

- First and foremost, attention needs to be drawn to what is unique or unusual, especially things that could be considered “hidden treasures” in an area (“Tell of things to see in each community. If they are known for something, what is it?”) To be attractive, they need to be things that can’t be seen or done at home or closer by. Failing that, information should be specific about what attractions and activities are available (“More of it, and more specific info (as in Visit Ukrainian Village outside Vegreville or Visit Royal Tyrrell in Drumheller, not visit Alberta in general). Unless people know about neat stuff they're not going to see it”);
- Events need better promotion, with a comprehensive listing on an event calendar being optimal (“Promote events more so we know what is going on before it is over”);
- Special financial incentives, including contests and prizes, coupons, discounts, special promotions or all-inclusive packages need to be publicized (“I read the newspaper. I would love coupons, packages etc. to be in the paper more often than they are so I can plan trips around the deals I see!);
- Access information should be made available, including how to get there, the best time to visit and suggestions for circle tours or routes to follow that add interest to the trip;
- A few wanted reassurance about supporting amenities at the location, including availability of groceries, restaurants, shopping, accommodation, etc.

Suggestions were also received about the media that should be used to communicate all this information.

- Leading the pack was online access, whether through websites, social media or online advertising (“More social media-based marketing. I'm sure there's already a print campaign, but I don't subscribe to print magazines or newspapers, only digital ones”).
- This was followed by television, both commercials and features.
- In third spot was outdoor, including billboards, signage, hoardings and bus. In some cases the outdoor promotions referred to signage at the

destination to draw attention while the visitor was on the move or in the area.

- In fourth place were flyers or other materials delivered to the door.
- These beat the remaining mass media opportunities – radio, magazine and newspaper – reflecting the new reality in media use and the very specific desire for ease of access to travel information in a timely manner.

Culinary experiences, service quality, festivals and events, update attractions

CULINARY EXPERIENCES

The major change to improve culinary experiences in rural Alberta is the need for a wider range of choices in food and restaurants. In many cases the desired choices were simply that – more options to choose from – but ethnic foods were suggested a number of times (Exhibit 47).

A significant proportion wanted better quality food (sometimes termed "good" or "better tasting" food) or fine dining.

Many others wanted to enjoy more local food, meaning locally grown products and cultural specialties that are unique to, or representative of, the area. Most respondents referred to restaurant food, but some wanted to purchase distinctive local products at farmers markets or food events.

Exhibit 47: Improvements needed for culinary experiences

	Total choosing this item n=102 %
More food selection/ types/ styles of food/ more variety/ choice/ restaurants	35
Better food/ better quality of food/ great food/ fine dining	22
More local food/ local cultural specialties/ menus/ locally grown products/ local restaurants/ farmers markets/ food events/ unique to area	21
Better customer service/ staff/ hours	13
Better/ more advertising/ promotion needed	10
Cost of food/ reasonable price/ better value	10
Other	9
No response/ don't know	5

Customer service, including quality of staff and operating hours was another suggested improvement, one that was probably underrepresented as it was the subject of a separate improvement opportunity.

Finally, the now familiar themes of the need for better promotion, especially of unique or top eateries, and reasonable costs offering good value, were repeated here.

SERVICE QUALITY

As with several other items on the list, service quality was ranked as a specific item that might improve tourism, but was also referenced under several other items by different respondents. The responses that specifically addressed the topic are shown in Exhibit 48.

The two most frequently mentioned improvements had to do with staff, as did several others:

- "Quality" of service appeared to be the biggest issue. It included such things as caring about the needs and wishes of the customer, and meeting them, as assessed by staff helpfulness, efficiency and timeliness of service;
- Almost equally as important was a desire for greater friendliness and hospitality, with customers being made to really feel welcome;
- Next were comments about wanting informed and informative staff, particularly when responding to general tourism enquiries about the area;
- Simple staff courtesy (politeness, manners) and poor attitudes were another issue; as was
- Cleanliness, particularly visible in the state of the washrooms;
- A fair number of respondents laid the blame on the employers, suggesting that better training and better staff selection was needed, or that not enough staff were employed.

Exhibit 48: Service quality improvements needed

	Total choosing this item n=110 %
Staff caring/ helpful/ better quality service/ efficient/ attentive/ timely service	21
Staff friendly/ hospitable	19
Support facilities/ accommodation/ better roads/ Wi-Fi/ cell service/ attractions/ areas for children to play safely/ good food/ restaurants/ better operating hours	12
Better staff training/ selection/ enough staff	11
Informed/ knowledgeable/ informative staff	11
Staff courtesy/ better attitude	9
Better prices/ deals/ value	9

	Total choosing this item n=110 %
Cleaner facilities/ washrooms/ cleanliness	5
Information/ mobile app with attractions and contacts/ advertising	3
More rest areas/ with amenities	3
Other	7
No response/ don't know	17

The second service theme was – probably not surprisingly at this point – availability of supporting infrastructure. The issues identified for improvement included:

- The availability and quality of all types of facilities and services including, accommodation, roads, internet and cellphone connectivity, attractions and areas for children to play safely, food services and operating hours;
- Better pricing or the availability of deals and discounts;
- Improved information and advertising; and
- More and better rest areas (also the subject of a separate improvement item, but evidently reflective of service in rural areas).

FESTIVALS AND EVENTS

When asked about improvements to festivals and events, the largest response, by far, was that they need to be better promoted (Exhibit 49). Respondents indicated that they simply were not aware of what is happening and that this information needs to be received in advance by those who plan ahead, and in real time for those who travel on the spur of the moment ("Better promotion so we know when and where to go. For example, we love the Cream Day at the Markerville creamery, but we never would have known about it if we didn't stumble across it. There must be similar events across Alberta. Is there a central place where they are all listed?")

Exhibit 49: Improvements needed for festivals and events

	Total choosing this item n=125 %

	Total choosing this item n=125 %
Better advertise festivals and events/ more awareness needed/ information/ advance notice	38
More of them needed/ more variety of them needed	24
Bigger/ better/ higher quality artists/ acts/ bigger names	19
Other suggestions for improving events	16
Cheaper prices/ less costly/ affordable/ specials	7
Other	10
No response/ don't know	9

Other suggestions for improvement included:

- Having more festivals and events in rural areas with a greater variety than at present;
- Improving the quality of the events, especially by having bigger events attracting more people (so they become "the" place to be) and better or bigger name artists to reassure them that the trip will be worthwhile;
- Affordability was as much a factor here as for other items.

UPDATE ATTRACTIONS

Although an unusually large proportion of respondents were unable to suggest how rural attractions should be updated, ideas that were suggested fell into three groups (Exhibit 50):

- Existing facilities need to offer something new to experience to make a repeat visit worthwhile ("I want to see a new thing, exhibits, not the same thing year after year");
- Facilities and their attractions or displays need to be modernized. In addition, maintenance meant more than keeping things running. Being old, worn out or in poor repair was noticeable and off-putting to respondents ("Lots of the attractions we visit have old broken down buildings and facilities. It would be nice to go to an attraction and feel welcome");
- More or new attractions are needed. The suggestions that were made were diverse and included using technology, interactive displays or things that would appeal to a family. In some cases no specific suggestions were

made, in keeping with the emerging theme that it is not necessarily the specific type of attraction that is most important, but that there is a “fun” attraction nearby that will keep them entertained and occupied.

Exhibit 50: Improvements needed to update attractions

	Total choosing this item n=107 %
Have something new to offer at existing facilities	17
More adverting needed/ more information on websites/ listings/ maps/ better roadside signage	17
Update/ modernize/ maintain attractions/ old/ worn/ in poor repair	16
Suggestions for attractions	11
More attractions needed/ new attractions needed (type unspecified)	6
Have cost effective attractions/ improve prices/ deals	5
Other	7
No response/ don't know	26

Old friends now, two other sets of results were:

- The need for advertising and information, and specifically way-finding assistance, including online information, maps and roadside signage;
- Affordable pricing with financial incentives to provide reassurance that value is being received.

Arts and cultural attractions, trail development, reservations/ booking ahead, roadside rest areas and connectivity

Arts and cultural attractions

As with festivals and events, the most frequently mentioned improvement for arts and cultural attractions was their publicity (Exhibit 51). More advertising, information and local signage was wanted, as well as information on venues and dates of operation ("Our problem is that we never seem to know what's going on in a town or area that we are visiting then miss something we would have enjoyed. Maybe an app for towns, etc. that visitors can go to, to find real-time info. Or a QR tag in the centre of town that takes you to a live site for info").

In terms of the attractions themselves, the suggestions included:

- Better quality and updated attractions ("Need to "freshen" them up - some displays are tired looking. Invest more money in display presentation and add related activities to expand the experience"); also more staff, better upkeep and better hours of operation;
- A wider variety of arts and culture attractions, that are fun and interesting to attend:
  - More unique arts and cultural festivals and events, including film, music, live theatre and literature ("Go beyond the ordinary. Provide a good cross-section, not just the usual. Invest in the arts -- all the arts: theatre (traditions plays, improv), literature (readings, writing retreats, writer-in-residence) ...");
  - More art and craft shows, particularly ones that focus on special cultural or local themes or works.

Exhibit 51: Improvements needed to arts and cultural attractions

	Total choosing this item n=114 %
More advertising/ information/ signage about arts and culture events/ museums/ attractions/ venues/ dates	27
Better quality attractions/ update locations/ more staff needed/ upkeep/ better hours of operation/ improve existing attractions	17
More unique festivals/ film/ music events/ live theatre/ literature	16

	Total choosing this item n=114 %
More/ greater variety of arts and culture attractions	13
More art/ craft shows/ culturally meaningful art/ locally oriented	7
Package deals/ family pricing/ discounts	3
Other	13
No response/ don't know	20

TRAIL DEVELOPMENT

Respondents selecting trail development as their first priority were happy to make very specific suggestions for improvement; relatively few did not answer the question (Exhibit 52).

The most frequent group of suggestions centred on communication:

- One set of responses concerned signage, including signage on the trail itself and well marked signs pointing to the trailhead on the road ("Make the paths well signed so you can't get lost");
- The next set combines a variety of information needs. Publicity about the existence of trails or places one can go for a hike or do other activities; information about conditions on the trail ("More information on web about trails and the difficultly, time, length, etc."); trail maps and access to this information online ("Maps with interesting lookout points or markers with interesting facts and information along the trails would be nice").

Exhibit 52: Improvements needed for trail development

	Total choosing this item n=100 %
More/ better trail signage/ roadside signs/ well marked	24
Information about [existing] trails/ hikes/ activities/ conditions/ trail maps/ website information/ advertising	24
Improve upkeep of existing trails/ better maintained/ packed/ clean	20
Amenities/ parking/ garbage/ accessibility for seniors/ washrooms/ viewing area/ seating/ lighting/ interpretation	19
More trails needed/ new	15
Make trails designed for specific uses, mountain biking, ATV, dog walking, bikes, quads etc	8
Paved trails needed	4
Other	14
No response/ don't know	8

The second set of responses focused on trails themselves:

- Maintenance was a major issue, with suggestions to ensure that they are better packed and clean, while a few thought that more paved trails are needed;

- The availability of various amenities on the trail was equally important. These included more parking, the supply of garbage cans, accessibility to trails that seniors can use, provision of washrooms, seating and viewing areas, lighting and interpretation ("Make the trails a little more developed and safer (i.e. more groomed, facilities along the way like garbage and outhouses)");
- More trails are needed and some should be designed for specific uses such as mountain biking, ATVs or quads, dog walking and cycling ("More accessible trails for wheelchairs and seniors, for scenic easy walks").

Reservations/booking ahead

A substantial proportion of respondents must have thought that the topic of making reservations was self-evident as they did not respond to the question (Exhibit 53). Among those who did, the major issues were:

- Access to accurate, up to date information that can be easily obtained, preferably, but not necessarily, online ("Updated web sites with proper and correct up to date contact numbers").
- A simpler, smoother, quicker and more convenient process to make bookings, preferably with an online option to book;
- Improved bookings for campgrounds specifically (already touched on under accommodation). Some people want to pre-book campgrounds and do so earlier than possible at present to be assured that they have secured their site ("Making sure that reservations are allowed, and that there are sufficient spaces. Many campgrounds are turning to full time rental for the whole summer"); others complained how difficult it was to get campsites – and rooms – at short notice ("Don't want to drive all that way and have nowhere to go");
- And finally there was a group that addressed the need for better pricing and/or more deals or discounts.

Exhibit 53: Improvements needed relating to reservations

	Total choosing this item n=89 %
Easier access to information/ accurate/ up to date information/ online information	17

Have ability to pre-book campgrounds/ book earlier	15
More online booking available	15
Hard to get campgrounds/ rooms/ without booking long before	10
More discounts/ deals/ better prices	9
Smoother/ simpler/ more convenient/ quicker/ better service	8
Never had any issues/ had no problems/ good so far	6
Other	10
No response/ don't know	21

Roadside rest areas

There is no question about what the primary need relating to roadside rest areas is – there are not nearly enough of them in Alberta ("More of them. More little areas to stop by streams and rivers", "More areas to pull over and just relax, rest stops, and do a few activities").

The second most important set of improvements related to washrooms: more existing rest areas need them, while those that have washrooms should be improved. A higher quality washroom is needed to meet modern urbanites' standards, including heated facilities in the winter, flush toilets with toilet paper supplied, running water to wash ones hands and a functional mirror.

Another area for improvement was maintenance, as judged by overall cleanliness of the site and facilities ("Make them less gross. Clean them more often and provide better quality toilet paper").

After these key concerns, a group of suggestions about other improvements that would upgrade rest areas was received. They included: having a place sit under trees and rest or picnic, having some form of food service available and a variety of amenities such as a phone, play area and dog park ("A pay phone, a place to get a meal, a bathroom, a safe place to have a snooze off the road").

In addition, better signage was mentioned to ensure that drivers become aware of the existence of the rest area and that they don't miss the turnoff ("Closer to main roads and better signs indicating where they are").

Exhibit 54: Improvements needed for roadside rest areas

	Total choosing this item n=89 %
More needed/ more frequent	60
Cleaner facilities	18
More with washrooms	18
Quality of washroom/ heated/ flush toilet/ running water/ toilet paper/ mirrors	12
Picnic area/ sitting areas/ trees	11
Vending machines/ food/ restaurants available	9
Better signage needed	7

	Total choosing this item n=89 %
Other amenities/ phone/ playground/ dog park etc	6
Other	11
No response/ don't know	3

Connectivity

The suggestions relating to improved connectivity were straightforward (Exhibit 55). Cellphone reception appeared to be the key issue to address, ranging from wider coverage to better quality reception and more reliable connections ("Being able to make phone calls and check location, coordinates, etc.")

Unfortunately, a large proportion of respondents did not specify what they were referring to when they mentioned the need for better service, but in all likelihood most of them were talking about cellphone service ("Ensure all major wireless providers have full province wide coverage with no deadspots").

Internet access, including Wi-Fi availability and hot spots were second in line for improvement ("It would be nice if there was Wi-Fi in places like parks and hiking destinations so I can post photos and updates on the spot to friends, and family back home").

GPS reception was much less likely to be considered an issue.

Exhibit 55: Improvements needed relating to connectivity

	Total choosing this item n=79 %
Cell phone reception/ wider coverage/ good/ reliable connection	37
Wi-Fi availability/ hot spots/ greater internet access	25
Better service - connectivity/ reception/ more networks	25
GPS reception/ updated maps/ check location	3
Roads	3
Other	7
No response/ don't know	13

Sports events/tournaments, agricultural experiences and Aboriginal experiences, attractions or activities

Items in this last category were each chosen as being in greatest need of improvement by fewer than 50 people. The suggestions made should be regarded as qualitative in nature.

SPORTS EVENTS/TOURNAMENTS

Major improvements in relation to sports events included: the need for better quality facilities, more events need to be put on and the events themselves should be bigger and better to be more appealing. A small number of people also suggested that they need to be better publicised (Exhibit 56).

Exhibit 56: Improvements needed for sports events/tournaments

	Total choosing this item n=45 %
Better facilities needed / quality issues/ better parking/ better fields	23
More events needed	20
Bigger/ better /more appealing events needed/ specific types of events	20
Pricing/ more affordable	11
More advertising/ publicity/ information	7
Other	11
No response/ don't know	13

AGRICULTURAL EXPERIENCES

A wide variety of suggestions were received, but those mentioned often enough to categorize centred on publicity for agricultural events and attractions; more opportunities to learn about or experience the agricultural lifestyle and history; and more, better and more interesting activities and venues. A small group saw this differently and wanted more and better publicised farmers' markets (Exhibit 57).

Exhibit 57: Improvements needed for agricultural experiences

	Total choosing this item n=25 %
More information needed on agricultural events/ attractions/ more	24

	Total choosing this item n=25 %
awareness/ advertising non-specified	
Learn about agriculture/ history of small towns/ museums/ experience agricultural lifestyle/ immersive activities	19
Increase activities available/ better venues/ more interesting	16
More farmers' markets/ better advertise farmers' markets	7
Other	27
No response/ don't know	17

Aboriginal experiences, attractions or activities

Only a dozen or so respondents chose Aboriginal experiences, attractions or facilities as needing greatest improvement to encourage more visitation. Their suggestions were varied, with a few each mentioning:

- A need for a more immersive cultural experience that includes learning and participating, whether sleeping in a teepee, learning about natural remedies or making a traditional drum, watching live musical performances or recreating historic events;
- Better communication of information, education or programs about current and historic events such as the fur trade, treaties or reservation boundaries;
- Some mentioned a need for better publicity (e.g., interpretive signage, advertising) and access to such opportunities.

PROFILE OF URBAN ALBERTANS' DESIRED EXPERIENCES ON RURAL ALBERTA TRIPS

Geographic profiles

LEISURE TRIP DESTINATIONS

Regional travel to rural Alberta destinations was thoroughly discussed earlier as place of residence was a crucial contributor to the destination choices made (pp. 42-46). The results are not repeated here.

TRIP CHARACTERISTICS

The following differences tested as statistically significant and help to provide a feeling for travel preferences within a region, even though the differences compared to the average were usually quite minor.

- Calgary region residents were more likely to choose to stay in rural Alberta for only one night when on an overnight trip. Their accommodation preferences included resorts, rental condominiums, luxury hotels and wilderness lodges at an above average rate, while eschewing campgrounds or the home of a friend or relative; consistent with the latter, they were underrepresented in the VFR home accommodation segment.

  Although activity profiles on overnight trips were close to average, same-day trips revealed above average interest in many winter activities (cross-country skiing, snowboarding, snowshoeing, sleigh rides and dog sledding); visiting a national or provincial park; and warm weather activities like rock climbing, hiking/backpacking, walking/running, dirt biking/ motocross and horseback riding/trail rides. Calgary region residents also showed somewhat greater interest in heritage, arts and culture: visiting historic sites, museums or interpretive centres, shopping for authentic Aboriginal arts and crafts or interesting antiques, arts or crafts. They were much less likely to take VFR trips.

  When considering the niche product areas, Calgary had the highest level of interest in Aboriginal tourism and, on same-day trips, in cultural and heritage tourism and trail development.

  Improving culinary experiences was selected more often in Calgary as one of the top four requirements to increase rural leisure travel.

- Edmonton region residents chose the peak summer months for same-day travel to rural Alberta (June-August) and were less likely than average to visit in any other month. Their interest each month was at average levels for overnight travel.

  They were more likely to take longer overnight trips, especially trips lasting 7-13 nights.

  They particularly wanted vehicle rentals to be part of a travel package and were somewhat less likely to mention shopping incentives.

  Edmonton area residents were more distinctive for the activities they were less interested in doing (e.g., nature experiences, warm and cold weather outdoor activities, sports) than for the ones they wanted to do on a trip. However, a few did stand out relating to heritage and entertainment: visiting a community with a distinct cultural heritage, attending an arts or culture festival, participating in a hands-on arts/crafts learning experience, visiting a theme or amusement park and going on a railway excursion or historic train.

  Residents of the Edmonton region were less likely than other regions to choose any of the niche product options.

  One can't help but be struck by the differences between Calgary and Edmonton activity preferences; they may well reflect what is available at preferred destinations within driving distance rather than any inherent or societal distinctions.

- Southern Albertans were especially likely to choose to stay in moderately priced hotels/ motels on an overnight rural trip and were overrepresented in the self-contained accommodation group.

  They particularly wanted discounts on food & beverages on a same-day trip and on recreation & entertainment. On an overnight trip they were more likely to choose incentives to shop.

  Distinctive trip activities favoured more by Southern Albertans for both trip lengths included camping, visiting or staying at a lake, reservoir, river or stream, geocaching, seeing museums, historic sites or interpretive centres, strolling the streets of small towns and browsing or touring backcountry roads. On their ideal overnight trips they also planned to attend a live theatre performance, dinner theatre or open air play, to see large roadside statues, go to a spa, visit friends and relatives or go tobogganing or tubing on snow. On same-day trips they favoured horseback riding/trail rides, visiting a national or provincial park, walking/running, hiking/backpacking and needed things for children to do.

The niche product group for culture and heritage tourism drew disproportionately high interest in Southern Alberta on same-day and on overnight trips. In addition, same-day trips showed above average potential for trail development and overnight trips for special attractions and tours.

- Central Albertans would like to get discounts when they shop in rural areas for both trip lengths.

  Their activity preferences included: use of OHVs, visiting a water body, attending a live theatre performance, touring back country roads, finding things for children to do, sleigh rides and several forms of nightlife and entertainment (e.g., a nightclub, lounge, pub or bar with live band or jazz club, or a casino). On overnight trips, activities that were added included: camping, rock climbing, walking/running and going to a spa. On same-day trips alternative activities of interest included: visiting friends or family, hunting, watching or participating in a sports event, strolling the streets of a small town and browsing, dining out at a notable restaurant, aerial tours, visiting a theme or amusement park, a corn maze or taking a railway excursion.

  Among the niche product options, sport tourism was mentioned most in Central Alberta. This region was similar to Southern Alberta in interest in cultural and heritage tourism for same-day trips and special attractions and tours on overnight trips.

  The need to have enough fun experiences to do on a rural Alberta trip was chosen more frequently by Central Albertans as one of the top four improvements that would encourage travel.

- Northern Albertans were less likely than others to choose to travel on an overnight trip in rural Alberta in the shoulder months (May-June and September-October) or during the spring, summer and fall on a same-day trip (May-October).

  For their ideal overnight trip, they were much less likely to stay away for only one night and were overrepresented on stays between 2 and 13 nights. Accommodation chosen for this trip was more often the home of a friend or relative, a budget hotel/motel, back country camping or a hunting/fishing lodge; more upscale choices like a moderately priced hotel/ motel, resort, spa or condo rental were chosen less often than average. Not surprisingly, they were overrepresented in the budget accommodation segment and underrepresented in the moderate price group.

Despite their apparent budget consciousness, Northern Albertans were less interested overall in special travel packages or discounts, though for a same-day trip they were far more supportive of discounts on mass transportation (air, train, bus) and on vehicle rentals for an overnight trip.

Northern Albertans were more likely to choose to participate in outdoor activities on their rural trips. These included: rock climbing, using OHVs, cross country skiing, snowmobiling, ice skating and snowboarding on both trip lengths. They were also interested in watching a sports event, attending a music festival, event or concert, going to the movies or northern lights viewing/stargazing. They were much less interested in simply relaxing, although more than average said they wanted to do "nothing". In addition, camping, fishing, canoeing, kayaking or rafting were selected more often for overnight trips and geocaching for a same-day trip activity.

Northern Albertans were underrepresented in interest in any of niche product areas for same-day trips, but showed above average response to trail development and sport tourism options for longer trips.

Roadside rest areas were disproportionately likely to be selected as one of the top four necessary improvements to encourage further travel in rural Alberta.

Lifestage profiles

Young adult-only households

Young adult-only households were prepared to travel on a same-day trip at any time of the year and more likely than the other lifestages to do so in January, March and May. For overnight trips, they picked the winter and spring months even more frequently, from November to May, with the exception of April (possibly influenced by post-secondary final exam time).

Their most popular type of accommodation fell into the budget accommodation segment and they were also the group most likely to choose low end accommodation. Young adult-only households were most supportive of packages that included transportation, whether vehicle rentals or mass transportation.

Members of this lifestage were most likely to choose outdoor activities on their ideal trips. In warm weather they were above average in choosing to camp, visit or stay near a water body, go hiking/backpacking, rock climbing, cycling/mountain biking, motorcycling and windsurfing, wakeboarding, waterskiing or tubing. In winter they were far more likely to choose cross-country skiing, snowshoeing and ice skating. They were also more likely to choose to visit a protected natural area, view northern lights or go stargazing. By way of entertainment they more often chose to watch (and on same-day trips to participate in) sports events or tournaments, to take an aerial tour and go to a nightclub, lounge, pub or bar with live entertainment. On overnight trips they also chose snowboarding, dog sledding, visiting large roadside statues and to go to a spa.

Young adult-only households were likely to be the biggest beneficiaries of new product development in the niche product areas of trail development, sport tourism and festivals and events. It comes as no surprise then, that they were more likely to choose ensuring there are more fun experiences, bigger and better quality festivals and events, trail development and sports events/tournaments as the main things to improve to attract them to rural Alberta.

FAMILY HOUSEHOLDS

Family households were most likely to take day trips in July and to not take overnight trips in September. They planned slightly longer trips than average, being less likely to stay away for one night. Their accommodation choice was more often in the self-contained segment and they had above average interest in packages that included recreation & entertainment, especially but not only, on overnight trips.

Family households were notable only for choosing things for children to do at a far higher rate than both other lifestages. They were similar to young adult-only households in selecting outdoor warm weather activities, including water-based activities, but less likely to choose winter activities for a rural trip. Certain attractions caught their attention, like theme or amusement parks, zoos or aquariums, a corn maze and going to the movies. On same-day trips a nature-based or outdoor recreation event and a sports event also drew their attention.

Together with young adult-only households, family households were most likely to be interested in the niche trail development and sport tourism categories. Family households also wanted enough fun events – particularly family friendly activities – to lure them to rural Alberta and wanted attractions to be updated by having something new to see or do.

OLDER ADULT-ONLY HOUSEHOLDS

Older adult-only households were less likely to travel in rural Alberta in the winter months, from November to April, than the younger lifestages. Proportionately fewer planned to travel in July-August, so this cohort was really only above average in their intentions for overnight travel in September.

The moderate price accommodation segment was chosen most often, while high end and self contained options were less likely to be selected. Despite their accommodation preferences, they had less interest in packages and discounts.

Older adult-only households were distinctive in their preference for activities. They were more likely to choose options in the places, history and culture set, especially strolling the streets of a small town and browsing, shopping for local food or visiting food producers … or enjoying a meal at a notable local restaurant. They were also drawn by the arts and crafts group, particularly in visiting an art or craft gallery, studio or show, shopping for interesting antiques, arts or crafts or other items. Sightseeing was another group that drew their attention, including driving on special routes and touring back country roads. Although they were far less likely to choose almost all outdoor activities than the younger lifestages, walking/running, golfing and birding were exceptions. On an overnight trip they were more likely to choose to see historic sites, museums or interpretive centres, attend an arts or culture festival, take a guided group tour, interpretive walk or program and just to relax.

Given the above, it is not surprising that older adult-only households were most likely to choose activities in the niche product categories of cultural and heritage tourism and ag tourism/culinary tourism. Their distinctive picks for items to be improved to draw them to rural Alberta tended to focus on infrastructure, particularly the quality of accommodation, roads (improved signage) and roadside rest areas.

Behaviour profiles

Perhaps not surprisingly, respondents with the highest chance of visiting rural Alberta on a leisure trip in the next two years were intending to stay for a slightly longer than average period of time (i.e., a stay of more than one night was mentioned more often).

Current non-visitors, people who knew least or had the least favourable opinions and those who were least likely to visit rural Alberta, were overrepresented in the high end accommodation segment. This unmet need affects about 6%-10% of the potential visitor population.

Non-visitors were very supportive of purchasing a travel package or receiving discounts of various types. They particularly favoured the inclusion of the following: food & beverages, recreation & entertainment, shopping and vehicle rental, and on an overnight trip, accommodation and mass transportation.

Non-visitors selected almost every type of activity on the list at a higher rate than previous visitors, so the range of activities available was probably not a barrier to visiting.

The activities that appealed at a higher rate to the respondents most likely to visit included: strolling the streets of a small town and browsing, touring backcountry roads and relaxing. On overnight trips they also selected walking/running, seeing natural wonders, wildlife or scenic views, birding, shopping for local food, shopping for interesting antiques, arts or crafts or other items and experiencing Aboriginal culture. On same-day trips an additional activity was to visit family and friends.

On the other hand, the activities that appealed at a higher rate to people who were less likely to visit may point to areas where the experiences offered – generally ones that provide entertainment – need change, improvement or promotion. They included: attending a live theatre performance, dinner theatre or open air play; attending a music event, festival or concert; visiting a theme or amusement park, a zoo, aquarium or botanical garden; dog sledding; aerial tours; going to a spa or a casino. On overnight trips, going to the movies was also selected more often. On same-day trips the activities chosen included: watch a sports event; northern lights viewing or stargazing;

OHV use; windsurfing, wakeboarding, waterskiing or tubing; snowmobiling or a sleigh ride.

Items that were considered in greatest need of improvement to encourage visitation by people who had not visited rural Alberta in the past two years were having enough fun experiences, especially bigger and better festivals and events. Those who were least knowledgeable about and had the least favourable impressions of rural Alberta as a leisure trip destination called for more advertising, promotion and information. Among respondents with the greatest chance of visiting in the next two years, improvements to trails (especially additional amenities), roads and roadside rest areas (more with washrooms, picnic and sitting areas) were more likely to be chosen.

EQ profiles

Because of the large diversity of destinations and many EQ segments, there were few locations that stood out as being aligned with particular segments or groups. The exceptions were as follows:

- Familiarity Seekers, especially Virtual Travellers and Gentle Explorers, were above average in saying they didn't really know where they would go in rural Alberta. No Hassle Travellers said the same for a day trip.
- Gentle Explorers mentioned fewer rural locations.
- Enthusiastic Indulgers/Free Spirits were the most likely group to say they wouldn't take such a trip at all, either same-day or overnight.
- Learners, especially Cultural Explorers and Authentic Experiencers, chose a single location to visit on a same-day trip more often than others, while Escapists/Rejuvenators were more likely to choose a single location on an overnight trip.
- For same day trips:
  - Drumheller was overrepresented among Learners, particularly Cultural Explorers and Authentic Experiencers. It appealed less to Familiarity Seekers (especially Gentle Explorers) and Escapists/Rejuvenators;
  - Cochrane was chosen more often by Cultural Explorers and Cultural History Buffs;
  - Elk Island was overrepresented among Learners, particularly Authentic Experiencers;

- Writing-on-Stone was overrepresented among Enthusiastic Indulgers/Free Spirits;
- The Royal Tyrrell Museum was mentioned relatively more often by Authentic Experiencers and Enthusiastic Indulgers/Free Spirits.

- For overnight trips:
  - Canmore was selected more frequently than average by Escapists/Rejuvenators;
  - Drumheller was again overrepresented among Authentic Experiencers and Cultural Explorers;
  - Fort Macleod was chosen proportionately more often by Cultural History Buffs;
  - Stettler appealed to Cultural History Buffs and Authentic Experiencers in particular;
  - Waterton was particularly likely to be mentioned by Escapists/Rejuvenators, Cultural Explorers and Cultural History Buffs.

Most EQ segments were much more open to taking a day trip in any month of year than they were to take an overnight trip. Similarities and differences in trip details are presented first, followed by trip experiences as described by preferred activities shown on an indexed basis in Exhibit 58a for same-day trips and Exhibit 58b for overnight trips (see Appendix IV).

- Free Spirits over-indexed on very specific months for their overnight travel – October through April – but were generally average on same-day trips, under-indexing only in September-October.

  They would appreciate discounts for transportation (vehicle rental, mass transportation) and for shopping. Their preferred forms of accommodation were high end … or low end; their interest in VFR homes, budget hotels/camping and self-contained units was weak.

  Free Spirits who had not ruled out travel in rural Alberta were less likely than average to say they were not interested in rural activities and over-indexed on the niche Aboriginal tourism category as they had high interest in shopping for authentic Aboriginal crafts and experiencing Aboriginal culture. A glance at Exhibits 58a and b shows that they expressed high or very high interest in at least one activity in every group of experiences, indicating that they were receptive to rural Alberta's products. The outdoor activity groups – and especially winter activities –

were most popular. The activities themselves included most that were challenging and potentially high risk, for example, motorcycling, dirt biking/ motocross, snowboarding and aerial tours. After the day's activities they would like to indulge by going to a spa and to party at night (a nightclub, lounge or bar, the movies or a casino). They also chose visits to attractions and several types of festivals and events at an above average rate.

- Cultural Explorers showed above average preference for budget hotels/camping accommodation. Many would not use a package or discounts at all, or were not sure what they might use. Transportation incentives in particular, and a tour guide, were less likely than average to be chosen.

  On same-day trips, Cultural Explorers were highly unlikely to take part in physical outdoor activities, though this was not true on overnight trips when their most preferred activities included cross-country skiing, geocaching and snowshoeing. They had above average interest in Aboriginal tourism and in many of the activities listed in the 'arts and crafts' and 'places, history and culture' sections. They were particularly likely to choose to attend live theatre, an arts or culture festival, a music festival or to visit a corn maze.

- Authentic Experiencers had less taste for travel in November and December than average, were more likely to choose budget hotel/camping accommodation and rarely chose high end accommodation for their ideal rural trip. Discounts when joining an escorted group had appeal, but transportation deals did not, nor were shopping discounts of great interest on a same-day trip.

  There were relatively few activities with above average appeal to Authentic Experiencers on a same-day trip; in fact many under-indexed. This was not true at all for overnight trips, where many experiences, other than outdoor physical activities, over-indexed. These included birding, canoeing, kayaking or rafting, visiting a community with a distinct cultural heritage, attending an arts or culture festival, experiencing Aboriginal culture and visiting an arts or craft gallery.

- Personal History Explorers were more likely than average to choose to take a same-day rural Alberta trip in December and overnight trips in October and May. They preferred self-contained or high end accommodation and were far less likely to select options in the budget hotel/camping accommodation segment. They liked the idea of packages or discounts, particularly when they included mass transportation. For a same-day trip, food & beverages, shopping and recreation/entertainment had greatest appeal; for an overnight trip, vehicle rental and recreation & entertainment were chosen more often.

Personal History Explorers were open to taking part in most rural activities and rarely under-indexed. Particular preferences included: an arts/crafts learning experience, visiting a community with a distinct cultural heritage, experiencing Aboriginal culture, a railway excursion or ride on an historic train, a guided group tour, interpretive walk or program, aerial tours and relaxing. Appealing to their more adventurous and physical side were activities like ice walking/climbing, OHVs, motorcycling, dirt biking/motocross, sleigh rides and ice skating.

- Cultural History Buffs preferred March, April and May to a greater degree than average for an overnight trip, but were less likely to choose December, January and February. Same-day trips, however, were under-represented in all these months. Cultural History Buffs were particularly likely to choose self-contained or low end accommodation, but also high end. This segment was not sure what they would want in a package, though they were like Cultural Explorers in not choosing transportation or tour guides on same-day trips.

  Outdoor activities were underrepresented on the list of things they would choose to do in rural Alberta and as a result they under-indexed on the niche trail development category.

  Almost everything to do with arts and crafts was of high interest: attending an arts or culture festival, an arts or crafts learning experience, visiting an art or craft gallery, studio or show, shopping for authentic Aboriginal arts and crafts, and shopping for interesting antiques, arts or crafts or other items. Other experiences that were of high interest included birding and experiences with other cultures, such as visiting a community with a distinct cultural heritage, or attending an agricultural festival, country fair or show, rodeo or other western themed event.

- Virtual Travellers were overrepresented in their interest in the VFR home accommodation category and really only differed from average in wanting to travel on an overnight rural trip in December, presumably to see family or friends around Christmastime. They were least likely of all to be interested in a travel package or deals on the trip.

  Virtual Travellers over-weighted in October, November and February for same-day trips, but unlike other segments choosing winter months, they had below average interest in winter activities. For that matter, they had below average interest in almost all activities, whether on same-day or overnight trips. The rare activities on which they over-indexed included visiting friends or family and relaxing.

- No Hassle Travellers were strongly over-represented in their choice of October through April for an overnight trip to rural Alberta. They were more likely than average to choose high end, self-contained, VFR home or low end accommodation and would like a tour guide or escort included in a travel package, though there was less than average interest in discounts in this segment.

  Unlike other segments, No Hassle Travellers over-indexed strongly on many more activities on a day trip than an overnight trip. These included: snowmobiling, visiting family or friends, going to the movies, attending a live theatre performance, dinner theatre or open air play, visiting a corn maze and taking a guided group tour interpretive walk or program. They strongly over-indexed only on a sleigh ride for their overnight trip.

- The very large Gentle Explorers segment was average in most respects. However, they were the only EQ segment to over-index on activity centred accommodation and they also chose low end accommodation more often than average. They would prefer any travel package to include transportation, vehicle rental on a same-day trip and both a rental and mass transportation on an overnight trip.

  Their interests in terms of experiences on the trip were defined more by things they did not choose to do than those they did. For overnight trips, only four activities over-indexed (geocaching, snowboarding, participating in a sports event and going to a casino). This suggests that they want to be active in the day – and to kick back at night – but rural Alberta did not quite fill their vacation needs. On a day-trip, many more outdoor activities were selected, but again, none of the activities over-indexed strongly. What was also notable was that no non-physical activities were chosen at an above average rate, other than watching a sports event, which really straddles the boundary. Their higher selection of such activities as camping, hunting and ice-fishing helps to explain their interest in activity-centred accommodation.

- Rejuvenators found little to appeal to them in a winter trip (November through March) to rural Alberta lasting one or more nights. Their accommodation preference was especially likely to be in the budget segment and they had little interest in travel packages or discounts.

Rural Alberta apparently does not offer the escape that they are seeking as they under-indexed on many activities. The only ones that they over-indexed on were golfing, strolling the streets of a small town and browsing or visiting a national or provincial park and relaxing.

Trip planning information needs

Respondents who had earlier indicated willingness to take either a same day or overnight rural trip were asked what their preferred information sources would be before they left home and while on the trip. The overall categories of response are shown in Exhibit 59.

Most frequently chosen, both for pre-trip planning and while on the trip were print materials or sources that distribute print materials and professional advice.

Online access to information was preferred by as many before leaving home, but far less while on the trip. Nevertheless, over half the respondents' wanted online access while away.

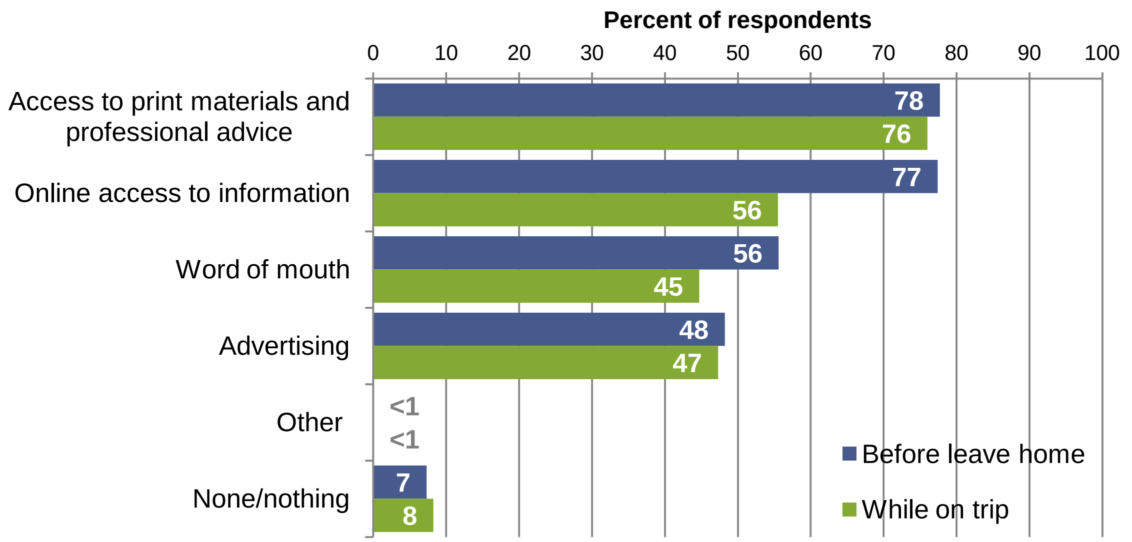
Next was word of mouth or the respondent's own personal experience, which came into play more often before leaving home.

As an information source, advertising was a preferred avenue for learning about opportunities among almost half, both before and while travelling.

The final finding of note was that fewer than one in ten did not want to use any information sources at all.

Each of these summary categories is examined in greater detail for further insights in Exhibits 60a to 60d.

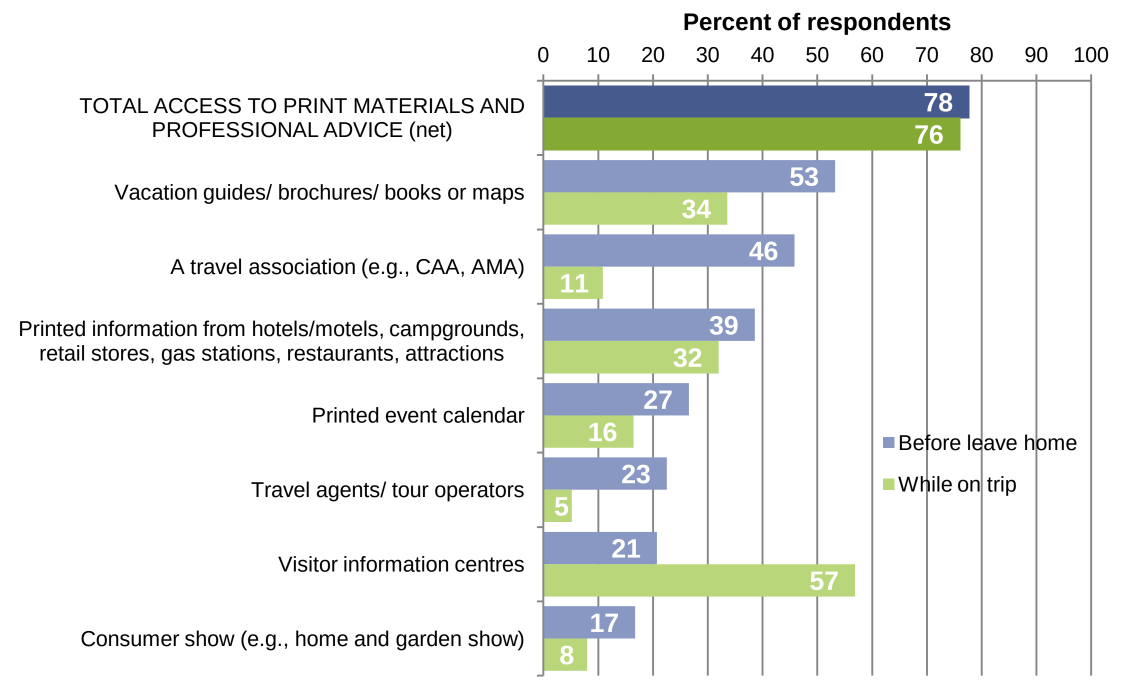
Exhibit 59: Print materials were the most popular information sources, but online has caught up for pre-trip planning
(Base: Total respondents willing to take a rural trip n=2355)



ACCESS TO PRINT MATERIALS AND PROFESSIONAL ADVICE

Before leaving home, the majority of people wanted to collect printed information that they could look through and perhaps take along on their trips afterwards. Most popular were different types of travel guides, maps and brochures. The preferred sources included a travel association or any tourist-oriented places where these materials might be found. One in five liked the idea of getting information from travel agents/tour operators, visitor information centres and consumer shows before leaving on the trip, suggesting that they were prepared to spread their nets quite widely to find the information. This is consistent with the expectation that rural information might be difficult to access (heard repeatedly in the last section of the report).

Exhibit 60a: Visitor information centres were the standout "winner" as a source for information while on the trip; many different types of print materials and sources would be used before leaving home
(Base: Total respondents willing to take a rural trip n=2355)



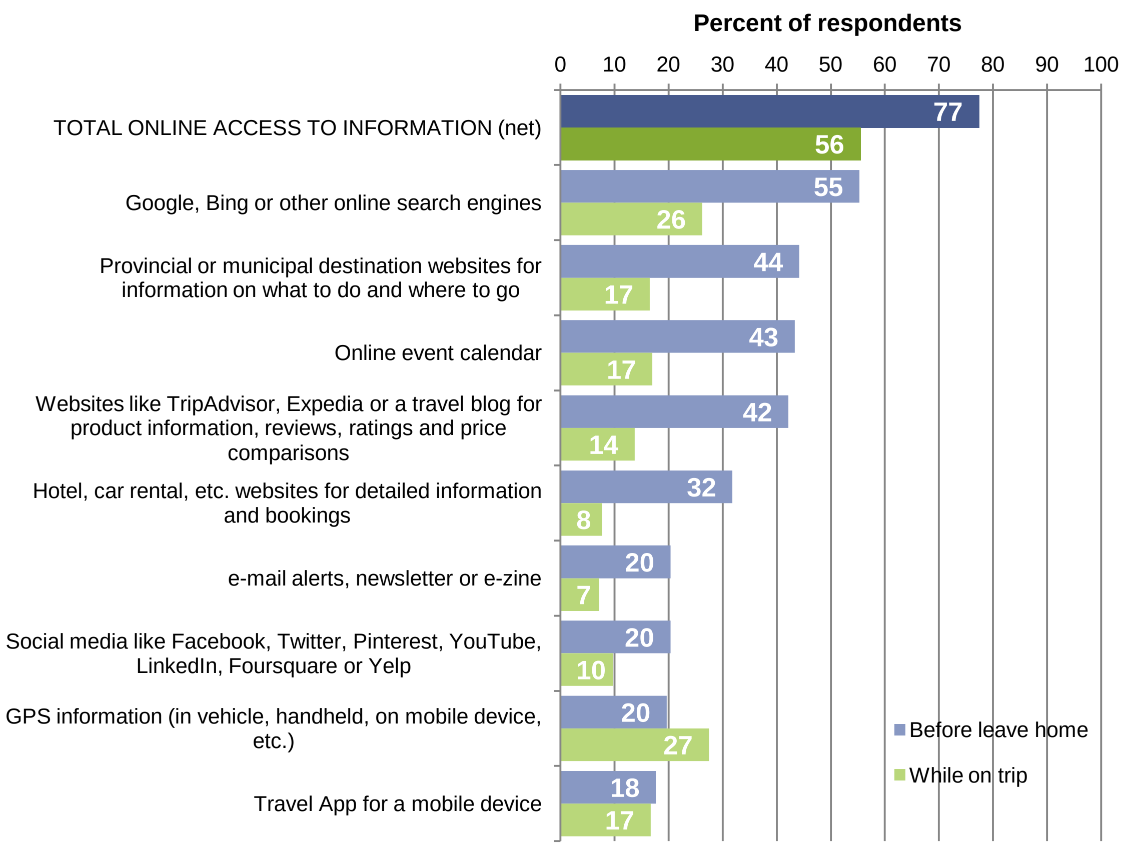
The situation was very different while on the trip. Visitor information centres became the most widely preferred source of information while travelling, while other professional sources – which are not often found in rural Alberta –

were much less likely to be selected. Picking up print information at tourist spots was mentioned almost as often as for pre-trip planning.

ONLINE ACCESS TO INFORMATION

Given the high proportion of people who selected different types of websites to consult prior to taking a trip, it is evident that no one website meets all needs. The most popular online option – and the most popular option overall – was to use a search engine and then to follow leads from there to obtain more specific information, especially from destination websites and travel booking and advice sites.

Exhibit 60b: Information from several different types of websites was preferred for pre-trip planning; GPS and general search engines were most likely to be used while on the trip
(Base: Total respondents willing to take a rural trip n=2355)



It is interesting that access to an online event calendar was as popular as access to a destination website and more popular than an equivalent print calendar (see Exhibit 60a, though a print format calendar remained in demand by more than one in four people).

Although online information was less likely to be used while on a rural trip, one in four indicated that they would use GPS or a search engine while away.

Social media fared no better than e-mail alerts, newsletters or e-zines, with one in five being interested in using them prior to leaving, but far fewer while on the trip.

In the focus groups there appeared to be interest in a comprehensive travel app for a mobile device. Since the focus group discussions were held, many new travel apps have emerged and the use of mobile devices continues to grow. At the time of the survey, approximately one in six people indicated that they would like to use such an app before leaving home and about the same proportion (two-thirds of whom were not the same people) while on the trip.

WORD OF MOUTH

What is heard from one's family, friends and colleagues is highly influential in determining where one goes and what one does on any trip. For rural Alberta, this avenue of information was not quite as popular as online and print, probably because urbanites are not all related to people living in the country. For those with such connections, personal recommendations before leaving are more likely to be used than while on the trip.

Personal past experience would play a similar role. It is interesting that most respondents (57%) did not choose this option either before leaving or on the trip, bearing out their lack of familiarity with rural Alberta.

Talking to people while en route was a preferred modus operandi for 25%. The focus group discussions suggested that for some, chatting with locals (including staff at support facilities) and learning from their intimate knowledge of the region, adds authenticity to the travel experience.

ADVERTISING

Multi-media campaigns remain the optimal approach to advertising rural locations. All the major media had between one in four and one in five supporters who would like to learn about tourism opportunities from them in order to make plans before leaving home.

However, for advertising that informs people once they are on their trips, roadside signs and billboards were by far the most important influencers. In fact, they were the second most important source overall while travelling,

Exhibit 60d: Many forms of advertising were important before leaving home; signage was crucial while on the trip
(Base: Total respondents willing to take a rural trip n=2355)

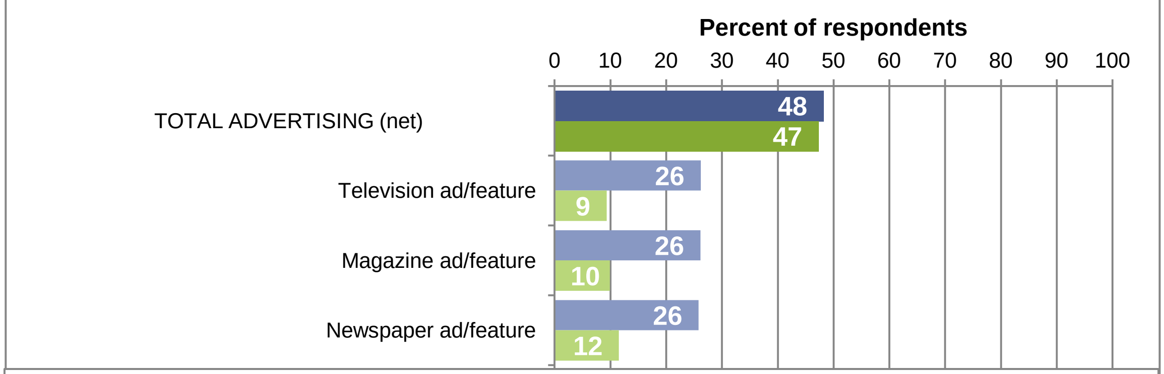
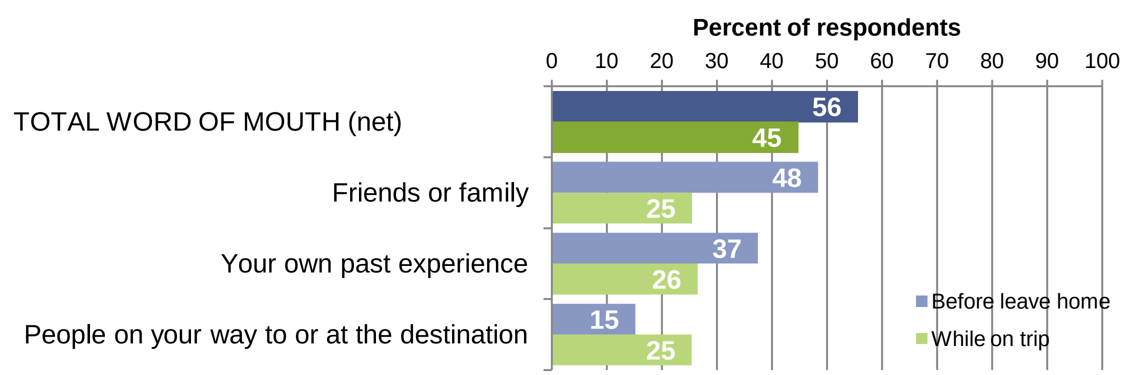


Exhibit 60c: The recommendations of family and friends and past experience were influential before leaving home; people en route or at the destination were of equal importance while on the trip
(Base: Total respondents willing to take a rural trip n=2355)



following visitor information centres. They clearly have a role that extends well beyond wayfinding. This choice attests to the number of people who are prepared to make or adapt their plans while on the go when they see signage about something that appeals to them.

Profile of urban Albertans on trip planning information needs

By demographic characteristics

The most consistent finding relating to information needs by different demographic groups was that women were more likely to use most information sources at a higher rate than men. The largest difference was in preference for word of mouth sources before leaving home, especially from family and friends. Other sources with a larger difference were online event calendars and vacation guides, brochures, books or maps. Print materials were chosen at a higher rate both for pre-trip planning and for use on the trip.

Recommendations by friends or family were especially important to the youngest age cohort (18-34 year olds), as was their own past experience and talking to people en route. This age group also favoured roadside signs or billboards, suggesting that they were especially likely to make spur of the moment decisions. Potential use of social media decreased with increasing age, both before and during the trip, being highest in the youngest age group.

18-34 year olds were less likely to choose any form of print materials, which is consistent with their being less interested in visiting a travel association before leaving. In the same vein, they were less likely to visit a visitor information centre while on the trip. In addition to social media, they were more interested in all forms of advertising while away, especially on the radio, in transportation-related venues and in magazines.

The 35-49 age cohort and family households had few distinctive information needs. As the most time-pressed cohort, it is perhaps not surprising that they particularly favoured picking up information at tourist venues while on their trips.

The oldest lifestage and age group were more likely to say they would use a travel association before leaving and a visitor information centre while on the trip. Although less likely to use a search engine, they would go directly to destination websites, suggesting that they use them in the same way they would have phoned a provincial information line when they were younger. This age group was more likely to use print materials and less interested in radio or arena advertising, or new technologies like a travel app for a mobile device, social media or a GPS.

By region

Calgary region residents were less likely than others to use a travel association or their own past experience for pre-trip planning. Once on the trip, they would also be less likely to use print materials or professional sources that distribute them, or to refer to advertisements for information.

Edmonton region residents also thought they would be less likely to pay attention to advertisements while on the trip, but were more likely to use a visitor information centre and print event calendar.

Southern Albertans exceeded all other regions in their expected use of word of mouth sources, both for pre-trip planning and when travelling. They were particularly likely to call on their own experience, to speak to family and friends and, once on the way, to talk to people en route. They also showed highest interest in advertisements as an information source while on the trip, regardless of the advertising medium (including online) and in an event calendar, whether print or online.

Central Albertans felt they would use an online event calendar and favoured print materials in general for pre-trip planning more than other regions.

Northern Albertans were distinctive for being much less likely to use advertisements for trip planning, either prior to departure or while on the trip. However, they were most likely of all to use information on road signs and billboards to make travel decisions while en route.

By behaviour

Respondents with the highest potential to visit rural Alberta in the next two years thought they would use more sources of information before and during the trip than people with a lower chance of visiting. The largest differentials were found for use of:

- Their own past experience
- Destination websites
- Family or friends
- GPS
- Travel association
- Visitor information centre

- Roadsign or billboard
- People on the way or at the destination

By EQ segment

Differences in information needs by EQ segment are shown in Exhibits 61 and 62 in Appendix IV on an indexed basis. A number of conclusions can be reached simply by looking at the highlighted values.

- On the whole, the EQ segments in the Enthusiastic Indulgers/Free Spirits and Learners groups (Personal History Explorers, Cultural History Buffs and Cultural Explorers) tended to over-index in their use of information before taking a trip and while on the trip. They were far less likely than average to say they would not use any information at all.
- The EQ segments in the Familiarity Seekers (Virtual Travellers and Gentle Explorers) and Escapists/Rejuvenators groups were quite the opposite. They tended to under-index in their use of information before and during the trip.
- Authentic Experiencers, classified in the Learners group, were somewhat different and over-indexed on some sources while under-indexing on others. No Hassle Travellers, classified in the Familiarity Seekers group, also did not "fit" their group mould; instead they tended to over-index in their use of information.
- These patterns were fairly consistent regardless of the type of information or source.
- Among the segments, Personal History Explorers appeared to be the heaviest information users, followed by Free Spirits, especially while on a trip. Virtual Travellers were the least likely to use information – particularly online – indexing close to average only on word of mouth.

Conclusion

We hope and trust that the summary of results from this study will be useful to a variety of different stakeholders: existing tourism industry members in rural Alberta, organizations that help to promote rural products, potential developers and those who help to support them from within Alberta Tourism, Parks and Recreation and Travel Alberta.

This study could not address all the findings of the focus groups – not the least of which relate to the image that is portrayed by the region and some of its "attractor" centres – due to interview time constraints. In addition, any survey report with multiple market definitions can only go so far. Answers to further questions that might be asked after reviewing the top line findings – inevitable after almost any study – may be contained in the detailed cross-tabulations or may be accessible through the use of special analyses. With the amount of data available in this study, the problem, for the author at least, has been to decide when to stop!

Yours truly,
INFACT RESEARCH AND CONSULTING INC.

Enid Markus
President
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Appendix I:
Sample profile

Unweighted and weighted sample profile

The table below profiles the achieved or unweighted sample (un), and the final weighted distribution (n). The weighted sample is equally distributed over three regions (Edmonton, Calgary and other large centres) and for three lifestage groups within these regions (Young adult-only, Family and Older adult-only households). The three “rural” regions – Southern, Central and Northern Alberta – were also weighted equally to one another as were males and females.

Profile of the unweighted and weighted sample

	Achieved sample %	Weighted sample %
Total sample distribution	**un=2391**	**n=2400**
Calgary region	34	33
Edmonton region	33	33
Other large centres	33	33
Southern Alberta	14	11
Central Alberta	13	11
Northern Alberta	7	11
Young adult-only households	24	33
Family households	34	33
Older adult-only households	42	34
Males	44	50
Females	56	50
Calgary region	**un=818**	**n=800**
Young adult-only households	33	33
Family households	36	33
Older adult-only households	31	33
Males	48	50
Females	52	50
Edmonton region	**un=778**	**n=800**
Young adult-only households	29	33
Family households	38	33
Older adult-only households	33	33
Males	45	50
Females	55	50

Other large centres	un=795	n=800
Young adult-only		
households		
Family households	11	33
Older adult-only	30	33
households	48	34
Males	38	50
Females	62	50

Note: Figures do not always add to 100% due to rounding

Appendix II:

Sample response and incidence rates

Sample response and incidence rates

A total of 26,662 invitations to participate were sent out, with responses being received from 6,350 panel members, for a 24% response rate.

1,364 of those who responded were disqualified because they did not meet specific sample criteria, 980 were rejected as the quotas were full and 1,588 were incomplete or rejected for another reason.

2,365 completed the survey and a further 53 from the soft launch who had not completed the additional questions were included in the final sample. The total incidence rate was 38%.

In all, 3,929 panel members were fully screened online. Respondent distribution was as follows:

Disqualified	%
Not in correct age group (i.e. under 18 or over 69 years)	2
Not in target lifestage	17
Not in geographic market (defined by postal code)	7
Had not taken any qualifying leisure trips in the past two years	7
Failed to pass validation question	2
Rejected for another reason	4
Qualified and complete	**61**

Among those screened who qualified by location and lifestage, 90% had taken a leisure trip in the past two years.

Appendix III:
EQ segments

Description of Explorer Quotient segments

The following description of EQ segments is extracted from the *Canadian Tourism Commission Global EQ Segmentation Refresh Research Report, 2011* (pp. 6 and 7). Percentages represent the size of each segment in the Canadian market.

ENTHUSIASTIC INDULGERS 12%

Enthusiastic Indulgers love life and live large! Their enthusiasm for life extends to their travel. This type lives to travel and there isn't much they aren't interested in experiencing when they do! They seek to travel in style and relish being indulged and pampered.

Free Spirits 12%

Young, experimentalist committed travellers looking for thrills and frills. They seek some structure when they travel to engage in worry-free hedonistic activities.

Social Samplers 0%

Well-educated, older, open-minded and often female travellers who prefer to focus on the 'must-see' attractions. They are very active planners and have an affinity for travelling in groups.

LEARNERS 41%

Learners are open, engaged and liberal in mindset. They travel to broaden their horizons, and explore and discover other cultures and soak in the natural beauty of the destinations they visit. They seek to have the most authentic and immersive travel experience as possible, and prefer to have the flexibility to explore at their own pace.

Cultural Explorers 9%

Avid, open-minded and socially-engaged travellers who immerse themselves in all aspects of the travel experience. They seek spontaneous and authentic experiences on their own terms.

Authentic Experiencers 12%

Older, highly educated, they relish experiencing all their travel destination has to offer in a reserved non-exorbitant way. They are drawn to history. They prefer to travel independently.

Personal History Explorers 13%

A more culturally diverse group, they prefer to connect with their roots. Looking for ease and comfort, they like to be taken care of. They are social and prefer being with others in groups when they travel.

Cultural History Buffs 7%

Highly educated, often single, they like to travel alone or with one other. Life-long learners, they seek the quiet discovery of the cultural and historical aspects of their destinations.

FAMILIARITY SEEKERS 43%

Familiarity Seekers are reluctant travellers who seek the comforts of home rather than authentic cultural immersion in exotic locations. If they do travel, it is often to visit family and friends in safe and secure surroundings. They are often budget-constrained travellers looking for inexpensive options.

Virtual Travellers 8%

Highly reluctant travellers who travel only when they must and typically to visit family or friends. Travelling is more of a chore for them. Fearful of change & complexity in their lives, they like to maintain control when they travel.

No Hassle Travellers 10%

Average travellers leading busy lives, understated and cautious in spending money. Seeking to escape everyday responsibilities. Favour nature and worry-free vacations.

Gentle Explorers 25%

Apprehensive travellers who prefer the tried and true over discovering new cultures. Prefer creature comforts and seek out luxurious hedonistic settings. Travel is an opportunity to be more indulgent than at home.

Group Tourists 0%

Older, risk-averse travellers who are motivated to see the main sights at a destination. They prefer to travel in the comfort and security of groups. Winter activities are highly appealing.

ESCAPISTS 5%

Escapists are family-oriented people who lead busy lives and are primarily motivated to travel to "get away from it all." They do not want travel to be more work. They look for opportunities to rejuvenate amidst beautiful scenery. They do not need luxury, but appreciate the benefits of that allow them to truly unwind and take a break.

Rejuvenators 5%

Busy, family-oriented people seeking relaxing escape. They enjoy sharing travel with others (family, friends) and prefer it to be a time for understated indulgence and relaxation, away from their responsibilities at home.

Escape Artists 0%

Travellers who seek to take a break from the real world, and completely disconnect from work. They have a strong dislike for travelling in groups, instead preferring to do things that are unique and spontaneous while on vacation.

Appendix IV:

EQ preferred experiences index

EQ information needs index

Exhibit 58a: Index of preferred experiences on same-day trips by EQ segment (Total respondents Index = 100)

	Total n=1968 %	ENTHUSIASTIC INDULGERS/ Free Spirits n=234	LEARNERS n=746	Cultural Explorer n=206	Authentic Exper-iencer n=312	Personal History Explorer n=158	Cultural History Buff n=69	FAMILIARITY SEEKERS n=725	Virtual Traveller n=111	No Hassle Traveller n=103	Gentle Explorer n=511	ESCAPISTS/ Rejuven-ators n=198
OUTDOOR ACTIVITIES	77	105	103	98	103	108	106	96	89	101	96	98
Walking/ running	41	111	110	112	104	112	134	87	88	89	87	108
Hiking/ backpacking	33	106	109	110	116	109	74	93	83	106	93	93
Golfing	19	106	87	73	81	113	98	99	82	107	101	125
Horseback riding/ trail rides	17	143	95	99	68	151	79	96	85	97	98	81
Camping	12	105	85	90	81	103	45	110	86	78	121	80
Cycling/ mountain biking	12	138	92	76	97	128	33	98	56	136	99	91
Rock climbing	11	143	88	84	91	99	59	102	45	82	118	63
Off highway vehicle (ATV, quadding, 4X4)	7	160	81	36	112	90	54	98	120	73	98	89
Geocaching (using a GPS to find hidden stashes)	7	151	114	142	99	83	163	85	170	79	67	47
Motorcycling	4	250	68	66	69	89	30	84	83	38	93	78
Dirt biking/ motocross	3	201	48	44	46	65	33	104	30	124	116	102
Hunting	3	112	68	60	64	63	118	117	60	43	144	86
WATER-BASED ACTIVITIES	54	115	90	95	78	113	82	102	82	93	108	104
Swimming	29	121	92	92	75	120	103	101	86	107	104	99
Visit/ stay at a lake, reservoir, river or stream	29	112	102	111	91	118	83	94	98	98	92	110
Fishing	17	135	86	120	73	81	52	95	89	98	96	116
Canoeing, kayaking or rafting	15	120	112	111	108	128	97	78	36	57	92	99
Boating, sailing	12	151	84	71	59	147	87	100	47	106	110	92
Windsurfing, wakeboarding, waterskiing, tubing	7	129	74	82	56	117	39	113	25	79	139	78
WINTER ACTIVITIES	37	111	89	75	91	112	71	108	75	93	118	78
Tobogganing or tubing on snow	11	120	95	81	113	79	98	97	62	86	107	76
Sleigh ride	11	110	95	94	66	144	119	107	71	126	111	78
Cross-country skiing	10	118	113	134	111	110	71	86	36	59	102	72
Ice skating	10	92	92	72	89	123	89	112	40	98	130	74
Downhill skiing	9	116	91	53	94	139	84	105	113	62	112	93
Snowmobiling	9	139	101	62	123	129	59	84	48	148	79	89

Snowshoeing	8	142	98	93	103	82	125	84	32	58	100	96
Snowboarding	8	164	70	53	79	101	18	114	21	87	140	44
	Total n=1968 %	**ENTHUSIASTIC INDULGERS/ Free Spirits n=234**	**LEARNERS n=746**	**Cultural Explorer n=206**	**Authentic Exper-iencer n=312**	**Personal History Explorer n=158**	**Cultural History Buff n=69**	**FAMILIARITY SEEKERS n=725**	**Virtual Traveller n=111**	**No Hassle Traveller n=103**	**Gentle Explorer n=511**	**ESCAPISTS/ Rejuven-ators n=198**
Dog sledding	6	160	86	82	81	111	63	101	67	65	116	71
Ice fishing	5	87	89	79	120	74	20	116	88	62	132	74
Ice walking/ ice climbing	4	117	105	63	118	133	104	82	62	114	80	45
NATURE EXPERIENCES	**66**	**98**	**106**	**105**	**104**	**110**	**111**	**94**	**75**	**110**	**95**	**103**
Visit a National or Provincial Park (e.g., Waterton, Elk Island, Wood Buffalo NPs; Dinosaur, Cypress Hills, Crimson Lake PPs, etc.)	43	115	107	111	109	101	104	91	93	90	91	90
See natural wonders, wildlife or scenic views (e.g., unusual rock formations, rolling hills, forests, wildflowers)	39	106	118	125	122	98	126	80	86	134	68	113
Visit a protected area (e.g., Willmore Wilderness Park, Athabasca Dunes, Kleskun Hill Natural Area, Whaleback Ridge, etc.)	21	134	104	109	90	134	86	92	70	104	95	71
Northern lights viewing or stargazing	21	117	111	109	107	119	116	83	39	79	94	108
Birding	10	86	109	107	112	83	160	90	54	80	100	105
FESTIVALS AND EVENTS	**50**	**112**	**97**	**100**	**80**	**130**	**93**	**100**	**67**	**103**	**107**	**92**
Attend a music festival, event or concert	24	118	99	112	74	124	119	100	81	107	102	89
Attend a nature-based or outdoor recreation event (e.g., wildflower festival, sand castle or ice sculpture contest, air show, demolition derby, mud bog)	20	130	113	137	94	129	86	84	44	118	86	84

Watch sports event/ tournament (e.g. hockey, soccer, baseball, curling, etc.)	19	122	81	82	67	111	66	117	71	122	126	74
Attend an agricultural festival, country fair or show, rodeo or other western themed event	17	118	116	120	110	120	120	83	61	96	86	75
Attend an arts or culture festival (e.g., heritage, poetry, film, theatre) or with a regional/cultural theme (e.g., Ukrainian Pysanka or Highland Games)	15	141	125	133	100	144	173	74	35	106	76	57
	Total n=1968 %	**ENTHUSIASTIC INDULGERS/ Free Spirits n=234**	**LEARNERS n=746**	**Cultural Explorer n=206**	**Authentic Exper-iencer n=312**	**Personal History Explorer n=158**	**Cultural History Buff n=69**	**FAMILIARITY SEEKERS n=725**	**Virtual Traveller n=111**	**No Hassle Traveller n=103**	**Gentle Explorer n=511**	**ESCAPISTS/ Rejuven-ators n=198**
Participate in sports event/ tournament (e.g., running event, fishing derby, hockey, soccer etc.)	9	122	70	79	51	94	73	121	47	102	141	74
PLACES, HISTORY AND CULTURE	**67**	**107**	**106**	**109**	**102**	**111**	**105**	**91**	**96**	**113**	**86**	**105**
See historical sites, museums or interpretive centres (e.g., heritage buildings, pioneer museums, ghost towns, Royal Tyrrell Museum, Frank Slide, Ukrainian Cultural Heritage Village etc.)	46	107	111	119	110	105	108	89	85	136	80	106
Stroll the streets of a small town and browsed	39	85	118	126	104	130	127	87	110	115	76	122

Shop for local food or visited a food producer (e.g., at a farmers' market, fruit stand, farm shop, u-pick farm, greenhouse, local bakery or ice cream shop, or toured a farm, winery, cheese factory, etc.)	33	112	115	121	103	123	130	84	76	125	78	106
Visit a community with a distinct cultural heritage (e.g., French, Ukrainian, Scandinavian, etc.)	15	134	112	104	94	145	142	88	38	100	96	61
Experience Aboriginal culture (e.g., powwow, storyteller, teepee living, traditions and lifestyles)	13	155	107	109	93	124	120	75	43	79	82	90
ARTS AND CRAFTS	**42**	**114**	**105**	**100**	**93**	**130**	**112**	**89**	**71**	**116**	**88**	**100**
Shop for interesting antiques, arts or crafts or other items	23	116	123	122	109	144	140	72	50	102	71	110
Attend a live theatre performance, dinner theatre or open air play	20	111	115	121	96	141	123	89	70	149	82	76
Visit an arts or craft gallery, studio or show	18	130	120	108	121	121	145	78	55	120	75	62
Shop for authentic Aboriginal arts and crafts	11	147	125	138	118	121	134	67	48	72	70	60
	Total n=1968 %	**ENTHUSIASTIC INDULGERS/ Free Spirits n=234**	**LEARNERS n=746**	**Cultural Explorer n=206**	**Authentic Exper-iencer n=312**	**Personal History Explorer n=158**	**Cultural History Buff n=69**	**FAMILIARITY SEEKERS n=725**	**Virtual Traveller n=111**	**No Hassle Traveller n=103**	**Gentle Explorer n=511**	**ESCAPISTS/ Rejuven-ators n=198**
Arts/crafts learning experience (e.g., photo safari, fine arts camp, workshop learning to make pottery, etc.)	11	128	127	106	101	179	187	77	41	100	80	70
ATTRACTIONS	**51**	**118**	**93**	**96**	**84**	**104**	**101**	**103**	**102**	**110**	**101**	**93**

See large roadside statues or other quirky attractions (e.g., Ukrainian Easter Egg, Star Ship Enterprise, Piggy Bank, Dinosaur, UFO Landing Pad, Gopher Museum, etc.)	33	135	97	90	92	113	105	91	98	96	88	98
Visit a theme or amusement park, a zoo, aquarium or botanical garden	27	131	90	107	73	107	76	104	92	114	104	98
Visit a corn maze	19	122	87	91	70	112	97	110	85	172	103	99
Railway excursion or ride on historic train	18	111	113	113	91	136	161	83	88	112	77	115
SIGHTSEEING	**48**	**102**	**106**	**96**	**104**	**122**	**105**	**93**	**81**	**110**	**93**	**98**
Sightsee on a circle route, drove from one place to another or toured along an historic trail	27	105	115	100	122	127	108	86	92	102	82	91
Tour backcountry roads	23	110	115	111	106	134	126	76	37	109	79	113
Aerial tours (hot air balloon rides, helicopter or small plane sightseeing tours)	14	152	92	86	67	148	95	98	82	123	96	68
Take a guided group tour, interpretive walk or program	14	127	121	97	124	142	129	81	45	151	74	90
NIGHTLIFE AND ENTERTAINMENT	**49**	**118**	**95**	**100**	**79**	**118**	**97**	**100**	**102**	**119**	**96**	**94**
Dine out at a notable local/ home town restaurant	38	114	107	121	88	127	109	90	110	133	77	111
Go to a nightclub, lounge, pub, bar with live band, jazz club, etc.	15	146	82	80	55	134	84	103	46	129	110	79
Go to the movies/cinema	15	143	76	85	57	111	57	110	99	204	93	72
Go to a casino	10	152	63	42	54	105	70	127	86	118	138	69
OTHER ACTIVITIES	**58**	**112**	**95**	**96**	**80**	**118**	**105**	**99**	**107**	**113**	**94**	**109**
Relax	38	112	106	108	78	145	141	87	114	112	76	128

	Total n=1968 %	ENTHUSIASTIC INDULGERS/ Free Spirits n=234	LEARNERS n=746	Cultural Explorer n=206	Authentic Exper-iencer n=312	Personal History Explorer n=158	Cultural History Buff n=69	FAMILIARITY SEEKERS n=725	Virtual Traveller n=111	No Hassle Traveller n=103	Gentle Explorer n=511	ESCAPISTS/ Rejuven-ators n=198
Visit friends or family (include wedding, graduation, anniversaries, family reunion, etc.)	23	97	92	106	79	90	111	111	129	165	97	103
Things for children to do (e.g., petting farm, mini-golf, spray park, playground, interpretive walk)	18	117	90	100	84	110	39	106	106	132	101	101
Go to a spa	14	175	77	78	48	122	103	98	52	144	99	63
NONE/ NOTHING	3	42	73	127	41	26	160	133	93	25	164	57

Over index: **Very strong** **Strong** Under index: **Very weak** **Weak**

Exhibit 58b: Index of preferred experiences on overnight trips by EQ segment (Total respondents Index = 100)

	Total n=1927 %	ENTHUSIASTIC INDULGERS/ Free Spirits n=219	LEARNERS n=725	Cultural Explorer n=202	Authentic Exper-iencer n=299	Personal History Explorer n=154	Cultural History Buff n=70	FAMILIARITY SEEKERS n=711	Virtual Traveller n=108	No Hassle Traveller n=100	Gentle Explorer n=503	ESCAPISTS/ Rejuven-ators n=214
OUTDOOR ACTIVITIES	**84**	**105**	**104**	**107**	**103**	**103**	**97**	**94**	**92**	**100**	**93**	**106**
Walking/ running	44	108	113	115	105	118	126	86	92	106	81	113
Hiking/ backpacking	41	100	117	135	117	110	81	83	78	98	82	109
Camping	40	90	107	126	108	98	74	91	78	99	92	111
Golfing	23	103	108	125	94	120	87	83	77	73	86	134
Horseback riding/ trail rides	22	128	109	106	100	131	105	87	52	116	88	94
Cycling/ mountain biking	17	119	114	142	99	124	76	84	71	80	88	102
Rock climbing	11	124	100	97	97	119	76	99	58	75	113	99
Off highway vehicle (ATV, quadding, 4X4)	10	118	110	87	113	162	52	94	76	67	103	74
Geocaching (using a GPS to find hidden stashes)	7	81	133	165	126	105	137	85	113	104	75	58
Hunting	5	90	82	89	81	90	48	116	50	90	135	101
Motorcycling	4	204	99	99	83	155	44	75	52	36	88	56
Dirt biking/ motocross	3	166	98	83	93	158	34	83	33	76	96	73
WATER-BASED ACTIVITIES	**68**	**102**	**102**	**114**	**96**	**108**	**81**	**97**	**82**	**103**	**98**	**103**
Visit/ stay at a lake, reservoir, river or stream	43	100	108	118	101	117	89	94	91	124	89	107
Swimming	39	99	112	124	109	106	102	88	79	107	86	107
Fishing	24	99	108	132	97	118	56	92	84	117	89	101
Canoeing, kayaking or rafting	20	118	130	142	141	114	81	68	53	64	72	93
Boating, sailing	18	154	96	87	80	143	83	90	52	89	98	89
Windsurfing, wakeboarding, waterskiing, tubing	10	129	96	112	93	91	72	95	59	74	107	79
WINTER ACTIVITIES	**39**	**132**	**91**	**97**	**77**	**122**	**69**	**98**	**71**	**86**	**106**	**88**
Downhill skiing	12	114	99	115	78	125	81	90	89	49	98	114
Sleigh ride	12	121	101	99	81	151	80	98	54	151	97	75
Tobogganing or tubing on snow	11	149	95	119	86	77	111	85	41	120	88	91
Ice skating	11	110	109	137	69	166	70	95	20	136	103	69
Snowmobiling	10	183	90	91	87	119	37	85	40	76	97	86
Snowshoeing	10	148	105	154	89	65	120	79	8	66	97	94

	Total n=1927 %	ENTHUSIASTIC INDULGERS/ Free Spirits n=219	LEARNERS n=725	Cultural Explorer n=202	Authentic Exper-iencer n=299	Personal History Explorer n=154	Cultural History Buff n=70	FAMILIARITY SEEKERS n=711	Virtual Traveller n=108	No Hassle Traveller n=100	Gentle Explorer n=503	ESCAPISTS/ Rejuven-ators n=214
Cross-country skiing	10	147	131	184	123	109	62	55	20	88	56	105
Snowboarding	9	159	78	81	69	122	15	112	22	124	129	64
Dog sledding	8	230	82	107	82	65	50	83	55	66	92	79
Ice fishing	7	138	98	121	104	89	22	94	34	97	107	61
Ice walking/ ice climbing	4	141	122	65	123	173	171	79	35	136	77	31
NATURE EXPERIENCES	**74**	**106**	**103**	**111**	**97**	**103**	**107**	**90**	**79**	**104**	**89**	**118**
Visit a National or Provincial Park (e.g., Waterton, Elk Island, Wood Buffalo NPs; Dinosaur, Cypress Hills, Crimson Lake PPs, etc.)	53	106	107	125	100	96	111	87	73	104	87	122
See natural wonders, wildlife or scenic views (e.g., unusual rock formations, rolling hills, forests, wildflowers)	45	100	121	133	118	116	112	78	69	119	72	112
Northern lights viewing or stargazing	31	124	119	131	117	113	108	79	73	76	81	90
Visit a protected area (e.g., Willmore Wilderness Park, Athabasca Dunes, Kleskun Hill Natural Area, Whaleback Ridge, etc.)	27	126	118	138	106	111	131	77	63	83	79	82
Birding	11	99	131	121	149	98	153	71	31	78	78	103
FESTIVALS AND EVENTS	**51**	**104**	**103**	**107**	**89**	**120**	**116**	**96**	**67**	**99**	**102**	**92**
Attend a music festival, event or concert	28	118	118	145	83	131	160	87	62	122	85	79
Attend a nature-based or outdoor recreation event (e.g., wildflower festival, sand castle or ice sculpture contest, air show, demolition derby, mud bog)	20	99	115	139	108	105	97	85	66	99	86	97

	Total n=1927 %	ENTHUSIASTIC INDULGERS/ Free Spirits n=219	LEARNERS n=725	Cultural Explorer n=202	Authentic Exper-iencer n=299	Personal History Explorer n=154	Cultural History Buff n=70	FAMILIARITY SEEKERS n=711	Virtual Traveller n=108	No Hassle Traveller n=100	Gentle Explorer n=503	ESCAPISTS/ Rejuven-ators n=214
Attend an agricultural festival, country fair or show, rodeo or other western themed event	17	111	130	117	127	136	167	81	46	102	84	51
Attend an arts or culture festival (e.g., heritage, poetry, film, theatre) or with a regional/cultural theme (e.g., Ukrainian Pysanka or Highland Games)	16	123	149	154	138	125	232	62	13	79	69	49
Watch sports event/ tournament (e.g. hockey, soccer, baseball, curling, etc.)	16	110	102	109	87	105	135	100	73	98	107	74
Participate in sports event/ tournament (e.g., running event, fishing derby, hockey, soccer etc.)	11	134	73	88	72	74	32	116	51	52	142	91
PLACES, HISTORY AND CULTURE	**65**	**111**	**109**	**112**	**108**	**109**	**109**	**88**	**92**	**106**	**84**	**101**
See historical sites, museums or interpretive centres (e.g., heritage buildings, pioneer museums, ghost towns, Royal Tyrrell Museum, Frank Slide, Ukrainian Cultural Heritage Village etc.)	45	113	119	129	110	126	112	79	80	116	72	98
Stroll the streets of a small town and browsed	41	90	122	123	124	112	129	81	94	100	74	116

Shop for local food or visited a food producer (e.g., at a farmers' market, fruit stand, farm shop, u-pick farm, greenhouse, local bakery or ice cream shop, or toured a farm, winery, cheese factory, etc.)	37	103	130	128	128	130	140	74	55	110	71	102
Visit a community with a distinct cultural heritage (e.g., French, Ukrainian, Scandinavian, etc.)	16	118	141	125	143	156	145	70	14	60	83	49
Experience Aboriginal culture (e.g., powwow, storyteller, teepee living, traditions and lifestyles)	13	135	141	135	137	171	108	62	42	94	60	58
ARTS AND CRAFTS	45	105	115	122	98	128	133	85	74	95	85	93
Shop for interesting antiques, arts or crafts or other items	24	111	129	133	126	123	145	70	62	110	64	96
Attend a live theatre performance, dinner theatre or open air play	23	97	130	156	99	143	161	79	53	130	74	78
Visit an arts or craft gallery, studio or show	19	111	136	134	137	127	156	70	40	98	70	69
	Total n=1927 %	ENTHUSIASTIC INDULGERS/ Free Spirits n=219	LEARNERS n=725	Cultural Explorer n=202	Authentic Exper-iencer n=299	Personal History Explorer n=154	Cultural History Buff n=70	FAMILIARITY SEEKERS n=711	Virtual Traveller n=108	No Hassle Traveller n=100	Gentle Explorer n=503	ESCAPISTS/ Rejuven-ators n=214
Arts/crafts learning experience (e.g., photo safari, fine arts camp, workshop learning to make pottery, etc.)	13	111	130	134	118	151	130	78	43	92	82	64
Shop for authentic Aboriginal arts and crafts	11	167	134	132	132	134	147	64	39	48	72	44
ATTRACTIONS	51	127	101	109	84	115	118	94	80	98	97	86

See large roadside statues or other quirky attractions (e.g., Ukrainian Easter Egg, Star Ship Enterprise, Piggy Bank, Dinosaur, UFO Landing Pad, Gopher Museum, etc.)	31	141	110	118	101	102	143	78	60	80	81	95
Visit a theme or amusement park, a zoo, aquarium or botanical garden	29	131	101	105	80	135	101	98	94	106	97	83
Railway excursion or ride on historic train	22	127	117	128	91	157	103	84	52	120	84	82
Visit a corn maze	14	111	109	150	75	118	119	91	66	83	99	88
SIGHTSEEING	**54**	**105**	**110**	**105**	**110**	**110**	**125**	**89**	**68**	**113**	**88**	**103**
Sightsee on a circle route, drove from one place to another or toured along an historic trail	32	99	125	114	132	117	143	80	62	105	79	99
Tour backcountry roads	28	94	124	119	129	111	147	74	37	121	73	112
Take a guided group tour, interpretive walk or program	17	121	131	107	135	153	131	72	61	126	64	78
Aerial tours (hot air balloon rides, helicopter or small plane sightseeing tours)	15	149	106	95	77	150	163	90	85	56	97	73
NIGHTLIFE AND ENTERTAINMENT	**57**	**118**	**101**	**100**	**89**	**117**	**117**	**96**	**89**	**103**	**96**	**94**
Dine out at a notable local/ home town restaurant	43	112	114	120	103	122	130	87	97	112	80	99
Go to a nightclub, lounge, pub, bar with live band, jazz club, etc.	23	141	96	89	81	129	111	97	51	109	105	77
Go to the movies/cinema	19	147	96	93	74	132	126	94	82	111	94	78
	Total n=1927 %	**ENTHUSIASTIC INDULGERS/ Free Spirits n=219**	**LEARNERS n=725**	**Cultural Explorer n=202**	**Authentic Exper-iencer n=299**	**Personal History Explorer n=154**	**Cultural History Buff n=70**	**FAMILIARITY SEEKERS n=711**	**Virtual Traveller n=108**	**No Hassle Traveller n=100**	**Gentle Explorer n=503**	**ESCAPISTS/ Rejuven-ators n=214**
Go to a casino	14	121	79	39	63	147	107	120	81	96	134	86
OTHER ACTIVITIES	**68**	**102**	**98**	**100**	**88**	**110**	**113**	**101**	**113**	**115**	**95**	**102**
Relax	50	100	106	113	88	121	130	92	130	125	77	116

Visit friends or family (include wedding, graduation, anniversaries, family reunion, etc.)	30	100	97	102	86	108	103	108	126	139	98	97
Go to a spa	23	157	95	93	66	132	140	97	59	100	104	71
Things for children to do (e.g., petting farm, mini-golf, spray park, playground, interpretive walk)	19	134	88	108	85	89	47	103	106	127	98	94
NONE/ NOTHING	2	38	56	75	54	0	133	162	159	0	195	39

Over index: **Very strong** **Strong** Under index: **Very weak** **Weak**

Exhibit 61: Index of pre-trip planning information needs by EQ segment (Total respondents Index = 100)

	Total n=2355 %	ENTHUSIASTIC INDULGERS/ Free Spirits n=303	LEARNERS n=854	Cultural Explorer n=233	Authentic Exper-iencer n=348	Personal History Explorer n=192	Cultural History Buff n=82	FAMILIARITY SEEKERS n=879	Virtual Traveller n=128	No Hassle Traveller n=119	Gentle Explorer n=632	ESCAPISTS/ Rejuven-ators n=238
ONLINE ACCESS TO INFORMATION												
Google, Bing or other online search engines	55	113	112	109	111	115	115	88	88	102	85	104
Provincial or municipal destination websites for information on what to do and where to go	44	99	126	125	128	119	139	79	71	131	71	105
Online event calendar	43	106	125	145	114	115	134	76	82	109	69	113
Websites like TripAdvisor, Expedia or a travel blog for product information, reviews, ratings and price comparisons	42	121	117	130	100	129	122	83	60	92	86	92
Hotel, car rental, etc. websites for detailed information and bookings	32	123	115	106	98	146	143	84	61	116	83	87
E-mail alerts, newsletter or e-zine	20	141	112	103	96	150	116	81	50	125	79	84
Social media like Facebook, Twitter, Pintrest, YouTube, LinkedIn, Foursquare or Yelp	20	149	113	122	96	143	86	77	50	103	78	88
GPS information (in vehicle, handheld, on mobile device, etc.)	20	117	116	107	101	162	96	78	63	84	80	98
Travel App for a mobile device	18	120	111	115	85	159	99	81	55	98	83	112
ACCESS TO PRINT MATERIALS AND PROFESSIONAL ADVICE												
Vacation guides/ brochures/ books or maps	53	110	118	125	113	122	108	81	80	121	74	115
A travel association (e.g., CAA, AMA)	46	106	113	114	111	112	118	88	73	119	85	105

	Total n=2355 %	ENTHUSIASTIC INDULGERS/ Free Spirits n=303	LEARNERS n=854	Cultural Explorer n=233	Authentic Exper-iencer n=348	Personal History Explorer n=192	Cultural History Buff n=82	FAMILIARITY SEEKERS n=879	Virtual Traveller n=128	No Hassle Traveller n=119	Gentle Explorer n=632	ESCAPISTS/ Rejuven-ators n=238
Printed information from hotels/motels, campgrounds, retail stores, gas stations, restaurants, attractions	39	115	112	125	94	124	121	83	76	101	81	108
Printed event calendar	27	126	120	118	107	146	114	77	89	133	64	96
Travel agents/ tour operators	23	139	96	80	74	156	97	93	68	112	95	88
Visitor information centres	21	146	88	88	69	123	85	102	61	117	107	70
Consumer show (e.g., home and garden show)	17	129	114	112	103	142	97	84	76	128	77	80
ADVERTISING												
Television ad/feature	26	133	122	108	106	170	115	78	79	132	68	79
Magazine ad/feature	26	136	118	120	107	138	113	73	54	119	68	106
Newspaper ad/feature	26	120	120	104	111	152	128	79	61	128	73	95
Radio ad/feature	19	136	116	102	100	162	113	80	61	137	73	87
Advertising or information at a sports venue (stadium, arena, etc.)	18	132	108	99	79	164	124	91	68	103	94	69
Advertising or information in an airport/ bus depot/ train station or on a plane, bus or train	14	146	111	99	96	155	105	81	56	124	78	75
Roadside sign or billboard	11	130	108	99	94	142	117	86	77	128	80	72
WORD OF MOUTH												
Friends or family	48	100	118	118	108	135	118	89	114	122	78	90
Your own past experience	37	103	125	125	119	135	130	81	111	124	67	96
People on your way to or at the destination	15	117	119	133	93	141	142	84	86	92	82	75
NONE/ NOTHING	7	48	53	42	44	77	61	145	190	65	151	54

Over index: **Very strong** **Strong** Under index: **Very weak** **Weak**

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Exhibit 62: Index of information needs while on trip by EQ segment (Total respondents Index = 100)

	Total n=2355 %	ENTHUSIASTIC INDULGERS/ Free Spirits n=303	LEARNERS n=854	Cultural Explorer n=233	Authentic Exper-iencer n=348	Personal History Explorer n=192	Cultural History Buff n=82	FAMILIARITY SEEKERS n=879	Virtual Traveller n=128	No Hassle Traveller n=119	Gentle Explorer n=632	ESCAPISTS/ Rejuven-ators n=238
ONLINE ACCESS TO INFORMATION												
GPS information (in vehicle, handheld, on mobile device, etc.)	27	119	119	107	115	150	94	80	63	98	79	103
Google, Bing or other online search engines	26	108	111	110	89	70	102	91	102	108	111	110
Online event calendar	17	98	118	154	105	90	136	87	54	102	90	99
Travel App for a mobile device	17	109	116	123	120	119	76	87	57	109	88	96
Provincial or municipal destination websites for information on what to do and where to go	17	69	134	144	134	118	147	82	76	152	70	97
Websites like TripAdvisor, Expedia or a travel blog for product information, reviews, ratings and price comparisons	14	116	128	127	127	148	94	77	52	65	85	69
Social media like Facebook, Twitter, Pintrest, YouTube, LinkedIn, Foursquare or Yelp	10	145	107	132	96	130	34	85	20	107	95	69
Hotel, car rental, etc. websites for detailed information and bookings	8	145	112	113	112	108	111	86	28	83	99	45
E-mail alerts, newsletter or e-zine	7	95	128	161	104	146	98	72	23	36	89	113
ACCESS TO PRINT MATERIALS AND PROFESSIONAL ADVICE												
Visitor information centres	57	96	114	117	118	106	109	90	91	126	83	111
Vacation guides/ brochures/ books or maps	34	103	118	137	106	122	109	86	73	108	85	104

Printed information from hotels/motels, campgrounds, retail stores, gas stations, restaurants, attractions	32	115	111	125	101	112	110	87	98	123	78	109
Printed event calendar	16	126	114	139	86	109	171	78	66	118	73	107
A travel association (e.g., CAA, AMA)	11	85	109	108	74	166	122	106	41	83	123	51
Consumer show (e.g., home and garden show)	8	166	110	114	60	185	132	69	26	55	80	81
Travel agents/ tour operators	5	165	94	87	59	132	175	78	16	83	90	64

	Total n=2355 %	ENTHUSIASTIC INDULGERS/ Free Spirits n=303	LEARNERS n=854	Cultural Explorer n=233	Authentic Exper-iencer n=348	Personal History Explorer n=192	Cultural History Buff n=82	FAMILIARITY SEEKERS n=879	Virtual Traveller n=128	No Hassle Traveller n=119	Gentle Explorer n=632	ESCAPISTS/ Rejuven-ators n=238
ADVERTISING												
Roadside sign or billboard	38	114	116	111	121	122	91	78	63	110	75	126
Radio ad/feature	12	137	111	114	90	156	87	86	42	127	87	62
Newspaper ad/feature	12	151	105	89	90	148	111	79	19	134	81	82
Advertising or information at a sports venue (stadium, arena, etc.)	12	174	107	101	102	138	74	78	58	84	81	65
Advertising or information in an airport/ bus depot/ train station or on a plane, bus or train	11	170	96	72	89	150	69	85	47	105	89	74
Magazine ad/feature	10	161	106	120	94	118	93	81	11	118	88	66
Television ad/feature	9	120	99	95	76	155	79	95	48	109	102	73
WORD OF MOUTH												
Your own past experience	26	107	126	132	114	132	139	82	115	132	65	89
Friends or family	25	97	116	111	104	144	112	94	105	137	84	84
People on your way to or at the destination	25	118	126	139	108	145	123	78	80	141	66	82
NONE/ NOTHING	8	50	49	36	67	26	61	140	167	76	146	93

Over index: **Very strong** **Strong** Under index: **Very weak** **Weak**

Appendix V:
Questionnaire

ATPR: Potential Demand for Alberta Rural Vacation Experiences

IN ORDER TO QUALIFY RESPONDENTS MUST ANSWER ALL QUESTIONS ASKED (EXCLUDING RELEVANT SKIPS)

A. RESPONDENT SCREENING AND CLASSIFICATION

To start, we'd like to ask you some basic questions to ensure we get a representative sample of households in your area.

ASK ALL

1 Are you:

Male 1
Female 2

ASK ALL

2 Which of the following age groups are you in?

17 years and under 0
18-24 1
25-34 2
35-44 3
45-49 4
50-54 5
55-64 6
65-69 7
70 and over 8

SCREEN OUT IF CODE 0 OR 8 IN Q2

ASK ALL

3 How old is the YOUNGEST child living in your household?

5 years and under 1
6 to 12 years 2
13 to 17 years 3
18 or older 4
No children in household 5

ASK IF Q2=1/2 AND Q3=4/5

4 Is anyone in your household aged 45 years or older?

Yes 1
No 2

SCREEN OUT IF CODE 1 IN Q4

ALLOCATE TO DLIFESTAGE; CHECK QUOTAS

DLIFESTAGE

Young adult-only household	1	**Q2=1/2 + Q3=4/5 + Q4=2**
Family household	2	**Q2=2/3/4 + Q3=1/2/3**
Older adult-only household	3	**Q2=4/5/6/7 + Q3=4/5**

SCREEN OUT IF DO NOT QUALIFY FOR ANY OF THE ABOVE

ASK ALL

5a What are the first three digits of your postal code?

☐ ☐ ☐

IF "T0J" ASK

5b What are the last three digits of your postal code?

☐ ☐ ☐ ☐ ☐ ☐

VALIDATE Q5a/b AGAINST FSA LIST (IN SEPARATE EXCEL FILE) & SCREEN OUT IF FSA/POSTAL CODE NOT LISTED;
ALLOCATE TO DREGION; CHECK QUOTAS

DREGION

1 The Calgary region (Calgary & Airdrie)
2 The Edmonton region (Edmonton, Sherwood Park & St. Albert)
3 Southern Alberta (Lethbridge, Medicine Hat, Coaldale, Taber, Redcliff, Drumheller, Brooks, & Strathmore)
4 Central Alberta (Red Deer, Lloydminster [AB only], Camrose, Wetaskiwin, Sylvan Lake, Lacombe, Whitecourt & Edson)
5 Northern Alberta (Grande Prairie, Peace River, Fort McMurray & Cold Lake)

ASK ALL

6 In the past 2 years (that is, since November 2010), did you take any out-of-town trips where you stayed away from home for at least one night?

Definition: Out-of-town means 'outside your usual environment' - that is, outside the area where you live, work and interact on a regular basis

Yes 1
No.. 2

ASK ALL

7 In the past 2 years (that is, since November 2010), did you take any same-day out-of-town trips of at least 40 kilometres away from home (one way)?

Definition: This means trips to any destinations that are located 40 kilometres or more from your place of residence and where you left and returned home on the same day. Forty kilometres is equivalent to approximately 25 miles. We are interested in one-way distance only.

Yes 1
No.. 2

SCREEN OUT IF CODE 2 IN BOTH Q6 AND Q7

ASK ALL

8 Which of the following describe the trip or trips you took in the past 2 years?

Check all that apply

- [ ] Visiting friends or relatives
- [ ] Pleasure, vacation or holiday
- [ ] Personal reasons (such as attending a sports event, wedding, etc.)
- [ ] Personal errands (such as going for groceries, medical appointments, drop someone off, etc.)
- [ ] Business and convention trips
- [ ] Commuting to work
- [ ] Moving to a new home
- [ ] None of the above

CODE 1 IF SELECTED, 0 IF NOT;

SCREEN OUT IF NONE OF THE FIRST THREE OPTIONS (VFR, PLEASURE, PERSONAL REASONS) WERE SELECTED IN Q8

B. TRAVEL EXPERIENCE

ASK ALL

9 Where have you travelled on your leisure trip/s (that is, to visit friends or relatives, for pleasure, vacation or holiday, or for personal reasons such as attending a sports event or wedding), in the past 2 years?

Check all that apply

- [ ] Alberta
- [ ] Canada
- [ ] United States
- [ ] Elsewhere in the world

CODE 1 IF SELECTED, 0 IF NOT

ASK IF 'ALBERTA' SELECTED IN Q9

10 What locations have you visited on your Alberta leisure trip/s in the past 2 years?

Check all that apply

- [ ] City of Calgary
- [ ] City of Edmonton
- [ ] Lethbridge, Medicine Hat, Red Deer, Lloydminster, Fort McMurray, Grande Prairie or Peace River
- [ ] Banff and/or Jasper National Parks
- [ ] Elsewhere in Alberta

CODE 1 IF SELECTED, 0 IF NOT

ASK IF 'ELSEWHERE IN ALBERTA' SELECTED IN Q10

11 What locations OUTSIDE the larger centres and Banff/Jasper National Parks have you visited on your leisure trip/s in Alberta in the past 2 years?

Do NOT include Lethbridge, Medicine Hat, Red Deer, Lloydminster, Fort McMurray, Grande Prairie, Peace River, Calgary, Edmonton (the larger centres), Banff or Jasper in your list

______________________ ______________________ ______________________

______________________ ______________________ ______________________

______________________ ______________________ ______________________

______________________ ______________________ ______________________

C1. OVERALL KNOWLEDGE AND IMPRESSIONS

ASK ALL

12-1 How familiar would you say you are with Alberta locations outside the larger cities and Banff/Jasper National Parks as places to visit on a leisure trip?

You know a lot about them 5
You know something about them 4
You know a little about them..3
You have heard of them, but know nothing about them..........2
You have never heard of any..1

ASK IF Q12-1 >=2

13-1 What is your overall impression of Alberta locations outside the larger cities and Banff/Jasper National Parks as places to visit on a leisure trip?

Very favourable......................................5
Somewhat favourable 4
Neither favourable nor unfavourable 3
Somewhat unfavourable 2
Very unfavourable..................................1
No impression 9

C2. RURAL ALBERTA TRIP PROFILES

ASK IF 'ELSEWHERE IN ALBERTA' SELECTED IN Q10

12 Please describe the leisure trip where you visited … (PIPE IN ONE RANDOMLY SELECTED ANSWER TO Q11).

Select one or more answers under EACH heading

FOR MC USE CODE 1 IF SELECTED, 0 IF NOT

a.	**What other locations did you visit while on this trip?**	**LOCATION**
	List other locations visited (including any outside Alberta, if applicable)	**6 SMALL BOXES** ______________ ☐ **No other locations**
b.	**ASK IF >1 ANSWER IN Q12a** **Which one of these locations was the main destination on this trip?**	**LOCATION**
	Select one	**REPEAT Q12a LIST AND INCLUDE THE LOCATION NAME FROM THE HEADER**
c.	**ASK IF 'ELSEWHERE IN ALBERTA' SELECTED IN Q10** **In what month did you take this trip?**	**LOCATION**
	If more than one, select the month the trip ended	**DROP DOWN BOX** January … December, Not sure **(CODE 1 TO 12,99)**
d1.	**ASK IF 'ELSEWHERE IN ALBERTA' SELECTED IN Q10** **Altogether, how long was this trip?** *Select one*	**LOCATION**
	Same day trip	1
	Away 1 night	2
	Away 2 to 6 nights	3
	Away 7 to 13 nights	4
	Away 14 nights or longer	5
	Not sure	9
d2.	**ASK IF Qd1 >= 2 OR AUTO-PUNCH Qd2 = 1; Qd2 <=Qd1** **How long did you stay in … (LOCATION)?** *Select one*	**LOCATION**
	Same day trip	1
	1 night	2
	2 to 6 nights	3
	7 to 13 nights	4
	14 nights or longer	5
	Not sure	9
e.	**ASK IF Qd1 >= 2** **What type/s of accommodation did you use on this trip?** *Select all that apply*	**LOCATION**
	Resort	☐
	Luxury hotel	☐
	Moderately priced hotel/motel	☐
	Budget hotel/motel	☐
	Rented condo/suite/apartment hotel with kitchen/cooking facilities	☐
	Hostel/dormitory/college or university residence	☐

	Back country camping	☐
	Campground (e.g., tent, tent trailer, camper, camper van, fifth wheel)	☐
	Motorized recreational vehicle	☐
	Platform/yurt tenting (luxury camping/glamping)	☐
	Roadside, pull-out or parking lot (e.g. Walmart)	☐
	Home of a friend or relative	☐
	Bed & Breakfast	☐
	Cottage/cabin/vacation home you or someone you know owns	☐
	Rented cottage/cabin	☐
	Spa	☐
	Hunting or fishing lodge, camp or outpost	☐
	Wilderness lodge	☐
	Farm or guest ranch	☐
	Other (please specify) __________	☐
	Not sure	☐
f1.	ASK IF 'ELSEWHERE IN ALBERTA' SELECTED IN Q10 **Was a travel package or were any special deals, coupons or discounts used on this trip?** *Definition: A travel package includes several services for which individual costs are not identified separately (for example, theatre and meals, accommodation, car rental and airfare, etc).*	LOCATION
	Yes	1
	No	2
	Not sure	9
f2.	ASK IF Q12f1=1 **What did the travel package or special deals, coupons or discounts include?** *Select all that apply*	LOCATION
	Vehicle rental	☐
	Air, train or bus transportation	☐
	Food or beverages	☐
	Accommodation	☐
	Recreation or entertainment	☐
	Shopping	☐
	Other items (please specify) ___________	☐
	Not sure	☐
g.	ASK IF 'ELSEWHERE IN ALBERTA' SELECTED IN Q10 **What were all the things you did while on this trip?** *Select all the activities undertaken while on the trip*	LOCATION
	OUTDOOR ACTIVITIES	
	Golfing	☐
	Rock climbing	☐
	Horseback riding/ trail rides	☐
	Camping	☐
	Hiking/ backpacking	☐
	Walking/ running	☐
	Cycling/ mountain biking	☐

Dirt biking/ motocross	☐
Motorcycling	☐
Off highway vehicle (ATV, quadding, 4X4)	☐
Hunting	☐
Geocaching (using a GPS to find hidden stashes)	☐
WATER-BASED ACTIVITIES	
Visited/ stayed at a lake, reservoir, river or stream	☐
Swimming	☐
Windsurfing, wakeboarding, waterskiing, tubing	☐
Canoeing, kayaking or rafting	☐
Boating, sailing	☐
Fishing	☐
WINTER ACTIVITIES	
Snowboarding	☐
Downhill skiing	☐
Cross-country skiing	☐
Snowshoeing	☐
Dog sledding	☐
Sleigh ride	☐
Snowmobiling	☐
Tobogganing or tubing on snow	☐
Ice fishing	☐
Ice skating	☐
Ice walking/ ice climbing	☐
NATURE EXPERIENCES	
Visited a National or Provincial Park (e.g., Waterton, Elk Island, Wood Buffalo NPs; Dinosaur, Cypress Hills, Crimson Lake PPs, etc.)	☐
Visited a protected area (e.g., Willmore Wilderness Park, Athabasca Dunes, Kleskun Hill Natural Area, Whaleback Ridge, etc.)	☐
Northern lights viewing or stargazing	☐
Birding	☐
Saw natural wonders, wildlife or scenic views (e.g., unusual rock formations, rolling hills, forests, wildflowers)	☐
FESTIVALS AND EVENTS	
Watched sports event/ tournament (e.g. hockey, soccer, baseball, curling, etc.)	☐
Participated in sports event/ tournament (e.g., running event, fishing derby, hockey, soccer etc.)	☐
Attended a nature-based or outdoor recreation event (e.g., wildflower festival, sand castle or ice sculpture contest, air show, demolition derby, mud bog)	☐
Attended an agricultural festival, country fair or show, rodeo or other western themed event	☐
Attended a music festival, event or concert	☐
Attended an arts or culture festival (e.g., heritage, poetry, film, theatre) or with a regional/cultural theme (e.g., Ukrainian Pysanka or Highland Games)	☐
PLACES, HISTORY AND CULTURE	

Saw historical sites, museums or interpretive centres (e.g., heritage buildings, pioneer museums, ghost towns, Royal Tyrrell Museum, Frank Slide, Ukrainian Cultural Heritage Village etc.)	☐
Visited a community with a distinct cultural heritage (e.g., French, Ukrainian, Scandinavian, etc.)	☐
Experienced Aboriginal culture (e.g., powwow, storyteller, teepee living, traditions and lifestyles)	☐
Strolled the streets of a small town and browsed	☐
Shopped for local food or visited a food producer (e.g., at a farmers' market, fruit stand, farm shop, u-pick farm, greenhouse, local bakery or ice cream shop, or toured a farm, winery, cheese factory, etc.)	☐
ARTS AND CRAFTS	
Attended a live theatre performance, dinner theatre or open air play	☐
Visited an arts or craft gallery, studio or show	☐
Shopped for authentic Aboriginal arts and crafts	☐
Shopped for interesting antiques, arts or crafts or other items	☐
Arts/crafts learning experience (e.g., photo safari, fine arts camp, workshop learning to make pottery, etc.)	☐
ATTRACTIONS	
Saw large roadside statues or other quirky attractions (e.g., Ukrainian Easter Egg, Star Ship Enterprise, Piggy Bank, Dinosaur, UFO Landing Pad, Gopher Museum, etc.)	☐
Visited a theme or amusement park, a zoo, aquarium or botanical garden	☐
Visited a corn maze	☐
Railway excursion or ride on historic train	☐
SIGHTSEEING	
Sightseeing on a circle route, drove from one place to another or toured along an historic trail	☐
Toured backcountry roads	☐
Aerial tours (hot air balloon rides, helicopter or small plane sightseeing tours)	☐
Took a guided group tour, interpretive walk or program	☐
NIGHTLIFE AND ENTERTAINMENT	
Went to a nightclub, lounge, pub, bar with live band, jazz club, etc.	☐
Went to a casino	☐
Went to the movies/cinema	☐
Dined out at a notable local/ home town restaurant	☐
OTHER ACTIVITIES	
Went to a spa	☐
Found things for children to do (e.g., petting farm, mini-golf, spray park, playground, interpretive walk)	☐
Visited friends or family (include wedding, graduation, anniversaries, family reunion, etc.)	☐
Relaxed	☐
Other (please specify) ___________________	☐
None/nothing	☐

D. INTENT TO VISIT (BUY CYCLE)

ASK ALL

13 In the next 2 years (that is, before November 2014), what are the chances that you will visit Alberta locations OUTSIDE the larger centres and Banff/Jasper National Parks on a leisure trip?

No chance or almost no chance	Very slight possibility	Slight possibility	Some possibility	Fair possibility	Fairly good possibility	Good possibility	Probable	Very probable	Almost sure	Certain or practically certain
0	1	2	3	4	5	6	7	8	9	10
O	O	O	O	O	O	O	O	O	O	O

ASK IF Q13 >= 6

14 Which one of the following statements BEST describes how far along you are in planning/ booking a trip where you would visit Alberta locations OUTSIDE the larger centres and Banff/Jasper National Parks?

Still just thinking about it 1
Seriously considering it 2
Have started to gather information 3
Currently planning the details of my itinerary 4
In the process of working out the details of travel and accommodation arrangements 5
Already booked my travel and accommodation arrangements 6

E. DESIRABLE EXPERIENCES/PRODUCT DEVELOPMENT OPPORTUNITIES AND INFORMATION SOURCES

ASK ALL

15 Now imagine your IDEAL trip to visit Alberta locations OUTSIDE the larger centres and Banff/Jasper National Parks. This ideal trip should include features that would *make you want to travel more often, or stay longer*, in such Alberta locations.

Please create two ideal trips, one a same day trip and the other a trip lasting one or more nights.
Select or type in answers to all questions for both trips.

FOR MC CODE 1 IF SELECTED, 0 IF NOT

a.	**What location would be your MAIN Alberta destination on the trip?**	**IDEAL SAME DAY TRIP**	**IDEAL TRIP OF 1 OR MORE NIGHTS**
	Type in name of main destination in Alberta outside the larger centres and Banff/Jasper National Parks	**1 SMALL BOX** ____________ ☐ **Don't know** ☐ **Would not do at all**	**1 SMALL BOX** ____________ ☐ **Don't know** ☐ **Would not do at all**
b.	**ASK IF Q15A NOT DON'T KNOW, AND NOT WOULD NOT DO AT ALL** **What other *Alberta* locations would you visit while on this trip?**	**IDEAL SAME DAY TRIP TO … (ANSWER Q15a)**	**IDEAL TRIP OF 1 OR MORE NIGHTS TO … (ANSWER Q15a)**
	Type in a list of other locations outside the larger centres and Banff/Jasper National Parks you would like to visit while on this trip	**6 SMALL BOXES** ☐ **No other locations**	**6 SMALL BOXES** ☐ **No other locations**
c.	**ASK IF Q15A NOT WOULD NOT DO AT ALL** **In what month/s would you take this trip?**	**IDEAL SAME DAY TRIP TO … (ANSWER Q15a)**	**IDEAL TRIP OF 1 OR MORE NIGHTS TO … (ANSWER Q15a)**

	Select from list. You may choose more than one if they have equal appeal	**January … December**	**January … December**
d.	**ASK IF Q15A NOT WOULD NOT DO AT ALL** **How long would this trip last?** *Select one*		**IDEAL TRIP OF 1 OR MORE NIGHTS TO … (ANSWER Q15a)**
	Same day trip	M	-
	1 night	**PRE-FILL (CODE 1)**	2
	2 to 6 nights		3
	7 to 13 nights		4
	14 nights or longer		5
e.	**ASK IF Q15A NOT WOULD NOT DO AT ALL** **What type/s of accommodation would you use?** *You may select more than one*		**IDEAL TRIP OF 1 OR MORE NIGHTS TO … (ANSWER Q15a)**
	Resort		☐
	Luxury hotel		☐
	Moderately priced hotel/motel		☐
	Budget hotel/motel		☐
	Rented a condo/suite/apartment hotel with kitchen/cooking facilities		☐
	Hostel/dormitory/college or university residence		☐
	Back country camping		☐
	Campground (e.g., tent, tent trailer, camper, camper van, fifth wheel)		☐
	Motorized recreational vehicle		☐
	Platform/yurt tenting (luxury camping/glamping)		☐
	Roadside, pull-out or parking lot (e.g. Walmart)		☐
	Home of a friend or relative		☐
	Bed & Breakfast		☐
	Cottage/cabin/vacation home you or someone you know owns		☐
	Rented cottage/cabin		☐
	Spa		☐
	Hunting or fishing lodge, camp or outpost		☐
	Wilderness lodge		☐
	Farm or guest ranch		☐
	Other (please specify) __________		☐
	Not sure		☐
f2.	**ASK IF Q15A NOT WOULD NOT DO AT ALL** **What would a travel package or special deals, coupons or discounts for this trip include?** *Select all that apply*	**IDEAL SAME DAY TRIP TO … (ANSWER Q15a)**	**IDEAL TRIP OF 1 OR MORE NIGHTS TO … (ANSWER Q15a)**
	Vehicle rental	☐	☐
	Air, train or bus transportation	☐	☐
	Food or beverages	☐	☐
	Accommodation	☐	☐
	Recreation or entertainment	☐	☐
	Shopping	☐	☐
	A tour guide or escort	☐	☐

	Other items (please specify) __________	☐	☐
	Not sure	☐	☐
	Nothing - would not use a package deal/coupons etc.	☐	☐
g.	ASK IF Q15A NOT WOULD NOT DO AT ALL **What are all the things you would do while on this trip?** *Select all the activities you would like to do while on the trip*	**IDEAL SAME DAY TRIP TO … (ANSWER Q15a)**	**IDEAL TRIP OF 1 OR MORE NIGHTS TO … (ANSWER Q15a)**
	OUTDOOR ACTIVITIES		
	Golfing	☐	☐
	Rock climbing	☐	☐
	Horseback riding/ trail rides	☐	☐
	Camping	☐	☐
	Hiking/ backpacking	☐	☐
	Walking/ running	☐	☐
	Cycling/ mountain biking	☐	☐
	Dirt biking/ motocross	☐	☐
	Motorcycling	☐	☐
	Off highway vehicle (ATV, quadding, 4X4)	☐	☐
	Hunting	☐	☐
	Geocaching (using a GPS to find hidden stashes)	☐	☐
		IDEAL SAME DAY TRIP TO … (ANSWER Q15a)	**IDEAL TRIP OF 1 OR MORE NIGHTS TO … (ANSWER Q15a)**
	WATER-BASED ACTIVITIES		
	Visit/ stay at a lake, reservoir, river or stream	☐	☐
	Swimming	☐	☐
	Windsurfing, wakeboarding, waterskiing, tubing	☐	☐
	Canoeing, kayaking or rafting	☐	☐
	Boating, sailing	☐	☐
	Fishing	☐	☐
		IDEAL SAME DAY TRIP TO … (ANSWER Q15a)	**IDEAL TRIP OF 1 OR MORE NIGHTS TO … (ANSWER Q15a)**
	WINTER ACTIVITIES		
	Snowboarding	☐	☐
	Downhill skiing	☐	☐
	Cross-country skiing	☐	☐
	Snowshoeing	☐	☐
	Dog sledding	☐	☐
	Sleigh ride	☐	☐
	Snowmobiling	☐	☐
	Tobogganing or tubing on snow	☐	☐
	Ice fishing	☐	☐
	Ice skating	☐	☐
	Ice walking/ ice climbing	☐	☐
		IDEAL SAME DAY TRIP TO … (ANSWER Q15a)	**IDEAL TRIP OF 1 OR MORE NIGHTS TO … (ANSWER Q15a)**
	NATURE EXPERIENCES		
	Visit a National or Provincial Park (e.g., Waterton, Elk Island, Wood Buffalo NPs; Dinosaur, Cypress Hills, Crimson Lake PPs, etc.)	☐	☐

Visit a protected area (e.g., Willmore Wilderness Park, Athabasca Dunes, Kleskun Hill Natural Area, Whaleback Ridge, etc.)	☐	☐
Northern lights viewing or stargazing	☐	☐
Birding	☐	☐
See natural wonders, wildlife or scenic views (e.g., unusual rock formations, rolling hills, forests, wildflowers)	☐	☐
	IDEAL SAME DAY TRIP TO … (ANSWER Q15a)	**IDEAL TRIP OF 1 OR MORE NIGHTS TO … (ANSWER Q15a)**
FESTIVALS AND EVENTS		
Watch a sports event/ tournament (e.g. hockey, soccer, baseball, curling, etc.)	☐	☐
Participate in a sports event/ tournament (e.g., running event, fishing derby, hockey, soccer etc.)	☐	☐
Attend a nature-based or outdoor recreation event (e.g., wildflower festival, sand castle or ice sculpture contest, air show, demolition derby, mud bog)	☐	☐
Attend an agricultural festival, country fair or show, rodeo or other western themed event	☐	☐
Attend a music festival, event or concert	☐	☐
Attend an arts or culture festival (e.g., heritage, poetry, film, theatre) or with a regional/cultural theme (e.g., Ukrainian Pysanka or Highland Games)	☐	☐
	IDEAL SAME DAY TRIP TO … (ANSWER Q15a)	**IDEAL TRIP OF 1 OR MORE NIGHTS TO … (ANSWER Q15a)**
PLACES, HISTORY AND CULTURE		
See historical sites, museums or interpretive centres (e.g., heritage buildings, pioneer museums, ghost towns, Royal Tyrrell Museum, Frank Slide, Ukrainian Cultural Heritage Village etc.)	☐	☐
Visit a community with a distinct cultural heritage (e.g., French, Ukrainian, Scandinavian, etc.)	☐	☐
Experience Aboriginal culture (e.g., powwow, storyteller, teepee living, traditions and lifestyles)	☐	☐
Stroll the streets of a small town and browse	☐	☐
Shop for local food or visit a food producer (e.g., at a farmers' market, fruit stand, farm shop, u-pick farm, greenhouse, local bakery or ice cream shop, or tour a farm, winery, cheese factory, etc.)	☐	☐
	IDEAL SAME DAY TRIP TO … (ANSWER Q15a)	**IDEAL TRIP OF 1 OR MORE NIGHTS TO … (ANSWER Q15a)**
ARTS AND CRAFTS		
Attend a live theatre performance, dinner theatre or open air play	☐	☐
Visit an arts or craft gallery, studio or show	☐	☐
Shop for authentic Aboriginal arts and crafts	☐	☐
Shop for interesting antiques, arts or crafts or other items	☐	☐
Arts/crafts learning experience (e.g., photo safari, fine arts camp, workshop learning to make pottery, etc.)	☐	☐

	IDEAL SAME DAY TRIP TO … (ANSWER Q15a)	IDEAL TRIP OF 1 OR MORE NIGHTS TO … (ANSWER Q15a)
ATTRACTIONS		
See large roadside statues or other quirky attractions (e.g., Ukrainian Easter Egg, Star Ship Enterprise, Piggy Bank, Dinosaur, UFO Landing Pad, Gopher Museum, etc.)	☐	☐
Visit a theme or amusement park, a zoo, aquarium or botanical garden	☐	☐
Visit a corn maze	☐	☐
Railway excursion or ride on historic train	☐	☐
	IDEAL SAME DAY TRIP TO … (ANSWER Q15a)	**IDEAL TRIP OF 1 OR MORE NIGHTS TO … (ANSWER Q15a)**
SIGHTSEEING		
Sightsee on a circle route, drive from one place to another or tour along an historic trail	☐	☐
Tour backcountry roads	☐	☐
Aerial tours (hot air balloon rides, helicopter or small plane sightseeing tours)	☐	☐
Take a guided group tour, interpretive walk or program	☐	☐
	IDEAL SAME DAY TRIP TO … (ANSWER Q15a)	**IDEAL TRIP OF 1 OR MORE NIGHTS TO … (ANSWER Q15a)**
NIGHTLIFE AND ENTERTAINMENT		
Go to a nightclub, lounge, pub, bar with live band, jazz club, etc.	☐	☐
Go to a casino	☐	☐
Go to the movies/cinema	☐	☐
Dine out at a notable local/ home town restaurant	☐	☐
	IDEAL SAME DAY TRIP TO … (ANSWER Q15a)	**IDEAL TRIP OF 1 OR MORE NIGHTS TO … (ANSWER Q15a)**
OTHER ACTIVITIES		
Go to a spa	☐	☐
Things for children to do (e.g., petting farm, mini-golf, spray park, playground, interpretive walk)	☐	☐
Visit friends or family (include wedding, graduation, anniversaries, family reunion, etc.)	☐	☐
Relax	☐	☐
Other (please specify) ___________________	☐	☐
None/nothing	☐	☐

ASK ALL

15-1 Which of the following are the four MOST IMPORTANT features or activities TO INCREASE OR IMPROVE at Alberta locations outside the larger cities and Banff/Jasper National Parks? Please choose features that would *make you want to travel more often, or stay longer*.

*Please type **1** next to the item you think is most important to increase or improve, **2** next to the second most important item, then mark your choice for third as **3** and fourth most important as **4***

RANDOMIZE LIST

a. **Aboriginal experiences, attractions or activities** (e.g., improve quality, variety or availability of Aboriginal arts and crafts, rock art, interpretive centres, powwows, teepee accommodation, food, or story telling)
b. **Accommodation facilities** (e.g., campground availability, crowding and rules/ restrictions; availability and quality of hotels and motels, cabins, B&Bs; amenities offered or costs)
c. **Advertising, promotion and information** (e.g., need to know more about where to go, what is special and why, what else there is to see and do, how to get there, what facilities/ amenities/ supplies are available, etc.)
d. **Agricultural experiences** (improve quality, variety or availability of rodeos, livestock shows, exhibitions and auctions; country fairs or farmers' markets with artisans demonstrating their crafts; tour a farm, greenhouse or processing plant to see how products are raised or made; visit a heritage farm or grain elevator; vacation on a working farm, attend a ranch riding camp or experience the cowboy lifestyle; shop at farm stores or farm stands; take part in a barn dance or challenge a corn maze)
e. **Arts and cultural attractions** (e.g., improve quality, variety or availability of museums or exhibits, historic sites, historic towns, architecture or forms of transportation; performing arts like live theatre, dance, symphony, opera; fine arts and crafts, galleries, studios and exhibitions of things like pottery, stained glass, furniture or paintings)
f. **Connectivity** (availability of cellphone reception, WiFi connections, GPS signals)
g. **Culinary experiences** (e.g., improve quality, variety or availability of places to purchase or pick fresh local food ingredients, sample local specialities at restaurants or tea houses, attend a food fair or festival, tour a winery, etc.)
h. **Ensure there are enough fun experiences** (e.g., enough to do in daytime and to entertain at night; offer exciting, adventurous or challenging activities)
i. **Festivals and events** (e.g., improve quality, variety or availability of nature-based or outdoor recreation events, arts, cultural or music festivals, etc.)
j. **Reservations/ booking ahead** (e.g., ability to book ahead, to book at short notice, to book online; accuracy of online availability, price information and facility pictures)
k. **Roads** (e.g., road surface and condition, finding your way)
l. **Roadside rest areas** (e.g., number, amenities available like washrooms, picnic tables, play areas, dog areas, walking paths, etc.)
m. **Service quality** (e.g., service staff attitudes and skills; hours of operation of restaurants, bars, laundromats or stores)
n. **Sports events/tournaments** (improve quality, variety or availability of sporting events to attend as a spectator, competitor, or volunteer)
o. **Trail development** (e.g., improve quality, variety or availability of trails for hiking, cycling, mountain biking, equestrian/horse trails, cross-country skiing, snowmobiling, etc.)
p. **Update attractions** (add new features or exhibits, provide a reason to visit again; modernize or refresh older facilities)
q. **None of these would make a difference**

ASK IF "None of these would make a difference" IS NOT RANKED 1st IN Q15-1

16-1 What specifically could be improved about … (*PIPE IN q15-1 1st BOLD TEXT ONLY*) at Alberta locations outside the larger cities and Banff/Jasper National Parks?

____

ASK ALL EXCEPT IF BOTH SAME DAY AND 1+ NIGHT ANSWERS IN Q15a WERE "would not do at all"

16 What information sources would you PREFER to use for a trip to visit Alberta locations OUTSIDE the larger centres and Banff/Jasper National Parks, BEFORE YOU LEAVE HOME?

Select all that apply

17 And what information sources would you PREFER to use WHILE YOU ARE ON THE TRIP?

Select all that apply

CODE 1 IF SELECTED, 0 IF NOT

PREFERRED information sources:	BEFORE LEAVE HOME	WHILE ON TRIP
Visitor information centres	☐	☐
A travel association (e.g., CAA, AMA)	☐	☐
Printed information from hotels/motels, campgrounds, retail stores, gas stations, restaurants, attractions	☐	☐
Travel agents/ tour operators	☐	☐
Advertising or information at a sports venue (stadium, arena, etc.)	☐	☐
Advertising or information in an airport/ bus depot/ train station or on a plane, bus or train	☐	☐
Roadside sign or billboard	☐	☐
Newspaper ad/feature	☐	☐
Magazine ad/feature	☐	☐
Radio ad/feature	☐	☐
Television ad/feature	☐	☐
Vacation guides/ brochures/ books or maps	☐	☐
Printed event calendar	☐	☐
Online event calendar	☐	☐
Consumer show (e.g., home and garden show)	☐	☐
Google, Bing or other online search engines	☐	☐
Websites like TripAdvisor, Expedia or a travel blog for product information, reviews, ratings and price comparisons	☐	☐
Provincial or municipal destination websites for information on what to do and where to go	☐	☐
Hotel, car rental, etc. websites for detailed information and bookings	☐	☐
e-mail alerts, newsletter or e-zine	☐	☐
Social media like Facebook, Twitter, Pintrest, YouTube, LinkedIn, Foursquare or Yelp	☐	☐
Travel App for a mobile device	☐	☐
GPS information (in vehicle, handheld, on mobile device, etc.)	☐	☐
Friends or family	☐	☐
People on your way to or at the destination	☐	☐
Your own past experience	☐	☐
Other (please specify) ____________	☐	☐
None/nothing	☐	☐

F. TRAVEL ATTITUDES/EQ SEGMENTATION

ASK ALL

18 For each of the following statements regarding your attitude toward travel, please rate your level of agreement.

RANDOMIZE LIST

a) I like to be able to impress my friends with all of the 5 star hotels and resorts I have been to.
b) I just want to relax and not have to deal with any worries or obligations.
c) The part that makes me most uncomfortable about travelling is having to adjust to unfamiliar locations, foods, people, languages and a different way of doing things.
d) I have everything I need at home; there's no reason to spend money to travel.
e) I like to be able to take my time at a historic site or in a museum and not feel rushed.

f) I avoid taking uncomfortable rides such as packed local buses. If it means missing something I wanted to visit, so be it.
g) I find it enriching to be exposed to others, engaging in their customs, routines, and rituals in their own environment – to me, that is the authentic travel experience.
h) I live for travel.
i) I feel safer if a tour operator has organized the hotel, the restaurants to eat at, and the sites to visit.
j) I am much more indulgent and carefree while on vacation than I am at home.

k) I'm more interested in understanding how my ancestors lived than in experiencing the culture as it exists now.
l) I want to get away from it all.
m) I prefer to visit places where I will be awe-struck by the sheer beauty of nature, the land, mountains, seas, and wildlife.
n) You can't find real culture here at home; you have to travel abroad to find it.
o) I like to experience local foods, local locations, and see local architecture.

p) I feel more comfortable travelling with other people or a guide.
q) I don't need to see all the recommended tourist sites to feel as if I've really visited a place; in fact, the best way to know a place is just to walk around and do everyday things like eating, shopping, socializing and relaxing, just as the locals would.
r) A family vacation is an important time to make family memories.
s) Wherever I go, I must have the very best there is to offer; the best hotels, the best restaurants, the best shopping, and the best service.
t) I want to come back from vacation feeling relaxed and refreshed.

COLUMN HEADINGS AND CODES

Totally agree 1
Somewhat agree 2
Somewhat disagree 3
Totally disagree 4

G. DEMOGRAPHICS

To conclude this survey, we would like to ask a few more questions for classification purposes only.

ASK ALL

19 How many people, including yourself and any babies, live in your household?

☐ **RANGE =1-15; IF Q19=1 (AUTOPUNCH Q20 =5)**

ASK IF Q19 >1

20 How old is the YOUNGEST child living in your household?

5 years and under 1
6 to 12 years 2
13 to 17 years 3
18 or older 4
No children in household 5

VALIDATION: COMPARE TO Q3; SCREEN OUT IF DIFFERENT

ASK ALL

21 Which of the following best describes your marital status?

Single, never married............................. 1
Married or living together as a couple..... 2
Widowed 3
Separated 4
Divorced 5

ASK ALL

22 What is the highest level of education you have COMPLETED to date?

Up to Grade 11 1
High school diploma.. 2
Trade certificate or diploma from a vocational school or apprenticeship training................ 3
Non-university certificate or diploma from a community college, school of nursing, etc. 4
University certificate or diploma below bachelor level 5
Bachelor degree... 6
University post-graduate degree or certificate above bachelor degree 7

ASK ALL

23 Were you born in … (DREGION)?

Yes 1
No... 2

IF Q23=2, ASK

24 How long ago did you come to … (DREGION)?

Within the last 2 years............................ 1
Over 2 to 5 years ago 2
Over 5 to 10 years ago 3
Over 10 to 20 years ago 4
Over 20 years ago 5

Alberta Tourism, Parks and Recreation and Travel Alberta thank you for participating in this survey and helping the Alberta tourism industry to respond to your needs.

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