

Visiting Friends and Relatives in Alberta Study (2016)

Quantitative Report for Alberta Culture and Tourism

Produced by TNS Canada

Report Date: November 25, 2016



Visiting Friends and Relatives in Alberta Study 2016

Report Date: 11.25.2016

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1. Executive Summary

1.1. Introduction, Summary of Method & Highlights

Introduction & Summary of Method

- The overall objective of this research was to better understand the nature and impact of the visiting friends and relatives (VFR) market in Alberta with the intent of increasing tourism visits and revenue generation from this market to the Province of Alberta.
- For the purposes of this research, a trip was classified as VFR if the visitor identified visiting a friend or relative as the primary purpose of their trip. Visitors categorized as 'pleasure' and 'business' by trip motive, but who stay with a friend or relative or even spend time with a resident they know, have also been considered a segment of VFR.
- This research consisted of two phases. An initial qualitative phase consisted of 14 focus groups across 6 markets among Albertans (those born and raised in Alberta or lived in Alberta more than 5 consecutive years) and new Albertans (those who have lived in Alberta less than 5 consecutive years) who have hosted at least one friend or relative in the past 2 years. These sessions were held across the province in April 2016. The results of the qualitative phase informed the quantitative research and are available as a separate report. The quantitative phase of research consisted of an online panel survey conducted among 2,057 Canadians aged 18 years and older that have hosted VFR for at least one night in the past two years:
 - The survey was in field from September 1st to September 30th, 2016;
 - Respondents for this survey were selected from among those who have registered to participate in online surveys;
 - As this was a panel survey, margin of error does not apply.
 - Surveying was conducted in English only and took an average of 15 minutes to complete.
 - The results have been weighted according to Statistics Canada's Census of the population according to age, gender and region within Alberta.

Highlights

- For most people, hosting is an enjoyable experience. It is an activity many have positive attachments to, and is likely something that people will be receptive to in communications from Alberta Culture and Tourism, Travel Alberta and other businesses and organizations involved in VFR either directly or tangentially. Hosting is important in the maintenance of people's relationships and is part of their lives.
- The fact that most hosts report having had additional expenses, particularly around groceries and restaurants, is an interesting impact of VFR in comparison to other forms of tourism. Although we still

find the typical expenses associated with tourism listed by respondents as extra costs (e.g., 49% listed restaurants, 33% entertainment, and 26% accommodations), the beneficiaries of VFR tourism activity are more likely to be outside of the traditional tourism sectors and areas, for example grocery stores (79%). This is an important story to tell in explaining and justifying efforts to engage VFR. It is a longer term investment that benefits a more dispersed group of stakeholders including residents, local businesses, smaller destinations, and visitors often overlooked by marketers but who can help create word-of-mouth marketing and awareness.

- Most on VFR trips didn't participate in many of the traditional sights and attractions of Alberta. Converting a percentage of those who considered activities but who did not visit them, would see a large boost in overall participation for these stakeholders.
- More than a third of respondents (36%) took vacation days to host their last group of visitors, with an average of 4.4 days for one hosting trip. From a balance of payments viewpoint VFR is encouraging Albertans to keep vacation time and money in the province.
- Almost two-thirds (65%) of the most recent VFR trips were initiated in part by the host. Residents are already convincing people to travel to their communities. In addition, while some visitors know what they want to see and have already decided before they arrive, hosts play a significant role in determining what visitors are doing or are at least helping to generate the list of activities that visitors are choosing from.
- VFR hosts are involved in much of the planning of activities, and do this both before (56%) their guests arrive, and during their visitors' trip (64%). Hosts use a variety of planning tools. However, they mostly depend on personal experiences and word-of-mouth from other friends and/or family.
- Hosting helps push tourism to smaller profile destinations. This may be because VFRs are more likely to be repeat visitors looking for new experiences. Once the iconic activities have been done, secondary places offer different and new things to do. There should be opportunities to influence activity by providing relevant and timely information on interesting and off the beaten path places and events.
- Older hosts, and those who have lived in Alberta longer, are more likely to host relatives. This is consistent with other studies that see a life cycle of the types of hosting people experience. VFR visitor groups seem to be either 1 or 2 people, or much larger groups.
- The majority (54%) of the most recent VFR trips were with relatives, a third (32%) with friends only and 14% with a mix of both, suggesting there were weddings, parties or other mixed events involved. Although the main activities were similar between friend and relative visits, visits from friends skewed toward more outdoor activities, overnight visits out of town, festivals and night clubs. Other literature suggests that groups of visiting friends tend to be more active and vacation oriented than relatives.

1.2. Opportunities

- First, engage residents to be familiar and comfortable with a variety of experiences, and refresh their knowledge of current events and activities happening at specific times where they can invite people, and know that things are happening during their guests' visits.
 - Nanaimo on Vancouver Island has held a tourism week in early summer aimed at encouraging residents to become familiar with what is on offer in their region, with the aim of making them more educated and trustworthy ambassadors for the destination.
 - Encouraging residents to think about specific events and activities and connect them to members of their own social networks, reminding residents of specific events and activities and prompting them to think about distant friends and relatives to visit- "Is there someone you know who would love to see the Rockies/Stampede/comedy festival etc.? Invite them this summer!"
- Almost half (47%) of VFR visitors who came for business reasons extended their stay for VFR. Learning more about this group and their travel patterns could be an interesting approach. Somehow making residents aware of conferences and making connections with their distant friends about coming to visit and extending their stay may be a fruitful approach.
- Offer packages or incentives to Albertans who are accompanied by an out-of-province guest. This could be used to identify a database of residents who do host, and to build a relationship with them on an ongoing basis both as ambassadors and intra-provincial tourists themselves.
 - Packages could be tailored to smaller, or more unusual experiences, that help residents feel like they're getting their guests a deal and being good hosts, while providing them an opportunity to visit somewhere different, and give their guests a sense of an authentic local experience.
 - This could help give residents a reason to invite people, and motivate them to explore their own province.
 - Each year, hosts could be reminded of previous trips and visitors, prompting social media activity, and possibly offering additional ideas for itineraries or deals etc. during that upcoming season.
- Second, once visitors are in the province, what can be done to encourage more activity?
 - Visitors not only decide what to do before they come, many people also determine some or all of the things they will do once they have arrived.
- Occasions that bring friends and family to visit are perhaps worth exploring. When there is a family wedding or celebration that brings people from across the country and beyond, there may be opportunities to offer the hosts some advice and guidance on providing suggested itineraries to their guests.

- Hosts need useful and timely information easily available. Although they consult many sources of information, respondents rated their own experiences and input from other friends and relatives as the most useful.
 - Perhaps also having a source of information that speaks to “Have guests coming this week? Here’s what you could do!” might be a good resource for people looking for interesting experiences.
- With more than a third of respondents taking more than 4 days off for their last hosting session it may be possible to encourage hosts to participate in further regional travel, encouraging more people to take more time to visit other Alberta destinations with their guests. This might be a useful indicator for measuring success of any future campaigns.
- Finally, what can be done to encourage more activity post visit, and repeat visitation by VFR visitors, and residents to other places that they’ve been to with their guests?
 - Build a relationship with residents as hosts. Hosting is a positive and emotional experience for many, brings visitors to the province, turns residents into local tourists, and helps promote Alberta through word-of-mouth marketing.
 - If a VFR campaign included some type of sign up and registration, residents could be engaged in the future with relevant prompts related to their hosting activities.
 - Being reminded of hosting may promote feelings of nostalgia and produce material worth sharing. Consider, for example, prompts such as “Remember this time last year when you took your friends to the Rockies? Take someone else this year and receive a discount”.
- Hosting does help put local attractions and sights in the mind of the resident host as possible places to visit, and of course conversion should be a goal, but it’s worth remembering that hosting can also be a tool for reminding residents of all the great things they have to do in their province for themselves on future trips.
 - Hosting makes people proud and happy, reminding them of this through communications could help encourage invites, and cause nostalgia for previous visits, that remind residents of the great places they have to visit themselves;
 - Positioning messages such as “Your guests are our guests, let us help you show them around.” might build engagement.
- Work with smaller regional DMOs to offer packages and incentives to Albertans travelling with out-of-province guests. This could provide a framework where residents can be engaged on an ongoing basis with reminders on anniversaries of past trips etc.
- Offer hosting advice and support to weddings and family reunions to promote additional travel for guests.
- Encourage business visitors to extend their stays and spend time with Albertan friends and relatives.

2. Foreword

2.1. Background

- Visiting Friends and Relatives (VFR) represents a considerable share of all tourism in Alberta, although knowledge of the VFR market is limited. According to Statistics Canada, VFR was the primary reason for 43% of trips to Alberta in 2012 and also accounted for 30% of all tourism spending in the province.
- VFR accounted for 45% of trips among in-province travellers and is the main reason for travelling to Alberta for more than half of Canadians visiting from elsewhere in Canada. In addition, VFR accounts for nearly one quarter of visits from the U.S. and approximately one third of the overseas visits to Alberta.
- Considering the size of the VFR market, Alberta Culture and Tourism and Travel Alberta wish to gain a better understanding of VFR travel in order to optimize marketing strategy and leverage this market to its full potential.
- This research not only offers Alberta Culture and Tourism and Travel Alberta the occasion to better understand the VFR market, but also to widen their perspective with regard to how this market is defined, potentially yielding new market opportunities.

2.2. Research Objectives

- The overall objective of this research is to better understand the nature and impact of the visiting friends and relatives (VFR) market in Alberta with the intent of increasing tourism visits and revenue generation from this market to the Province of Alberta.
- This research seeks:
 - To determine the incremental spend of the traveller and host from VFR;
 - To understand the role of the host in VFR trips;
 - To identify research tools used by the host;
 - To determine the extent of influence of new Albertans on friends and family and their decision to travel to Alberta;
 - To determine the extent of influence of Albertans on friends and family and their decision to travel to Alberta;
 - To identify the characteristics of VFR trips;
 - To identify the differences between hosting friends and hosting relatives;
 - To identify the needs and barriers of VFR.

- More specifically, this research seeks:
 - To determine what proportion of visits are from friends and what proportion are from relatives;
 - To identify who hosts, who visits and where do they come from;
 - To identify the characteristics of VFR market;
 - To determine if VFR visits included destinations outside of Alberta;
 - To understand how Travel Alberta/Alberta tourism industry could make hosting easier;
 - To understand how Travel Alberta/Alberta tourism industry can invest in Albertans as ambassadors to their province;
 - To develop a demographic and psychographic profile based on EQ quiz.

The findings will be used by Alberta Culture and Tourism to:

- To gain more insight into the VFR market in Alberta in order to determine ways in which Alberta can promote and support VFR;
- To guide Travel Alberta's future marketing efforts in the VFR market both domestically and internationally.

2.3. Defining VFR

- In order to better understand the VFR market, it is useful to take a broader approach to understanding VFR.
- A trip is classified as VFR if the visitor identifies visiting a friend or relative as the primary purpose of their trip. However, personal relationships between residents and visitors influence more tourism activity than the conventional methods for quantifying VFR suggest. Visitors categorized as 'pleasure' and 'business' by trip motive, but who stay with a friend or relative or even spend time with a resident they know could also be considered a segment of VFR. The influence and role of residents in all tourism activity should therefore be considered in order to fully leverage this target. Doing so has the potential to increase both volume and activity.
- For example, 2010 Statistics Canada data for the Toronto CMA indicated that 49 per cent of all overnight visitors were VFR by trip motive alone (versus pleasure, business or other). However, when type of accommodation was also accounted for this jumped to 61% (the additional 12% did not cite VFR as reason for their trip but stayed with a relative or friend). The International Travel Survey (Stats Can) also includes VFR as an activity and when this was included, the proportion jumped to 65% (65% is sum of VFR as trip motive, those who stayed with a relative or friend, or those who cited visiting friends and/or relatives as an activity on their trip).
- Personal relationships between residents and visitors are prevalent in 'pleasure' and 'business' tourism and although the influence may be less, the potential opportunity should still be considered.

- Another consideration is that VFR turns residents into domestic tourists who consume hotel nights and activities themselves, an impact that is seldom accounted for. Residents as hosts are often obliged to recommend and participate in local tourism activities. Hosts can use the visit as justification to take time off and enjoy their region with their guests, showing off what they are proud of, and finding new experiences that may be repeated and promoted in their personal networks.
- For new Albertans, hosting may offer the chance to explore and connect with the local culture, and seasoned hosts may look for alternative and diverse activities to entertain repeat visitors. The effects of hosting on resident behaviour and perceptions on Alberta as a destination, both during and after the visit are also worth considering.
- For the purposes of this research, VFR was defined from the host’s point of view, not the visitor’s. Recruited respondents had hosted friends or family for a minimum one night stay in the past 2 years.

2.4. Method

The research project involves two phases:

- The qualitative phase consisted of 14 focus groups across 6 markets among Albertans and new Albertans who have hosted at least one friend or relative in the past 2 years. The results of the qualitative phase informed the quantitative research and are available as a separate report.
- The quantitative phase consisted of an online panel survey conducted among 2,057 Alberta residents age 18 years and older that have hosted VFR for at least one night:
 - The survey was in field from September 1st to September 30th, 2016;
 - Respondents for this survey were selected from among those who have registered to participate in online surveys;
 - As this was a panel survey, margin of error does not apply. Surveying was conducted in English and took an average of 15 minutes to complete.
 - To allow for regional analyses, regional quotas were set as follows:

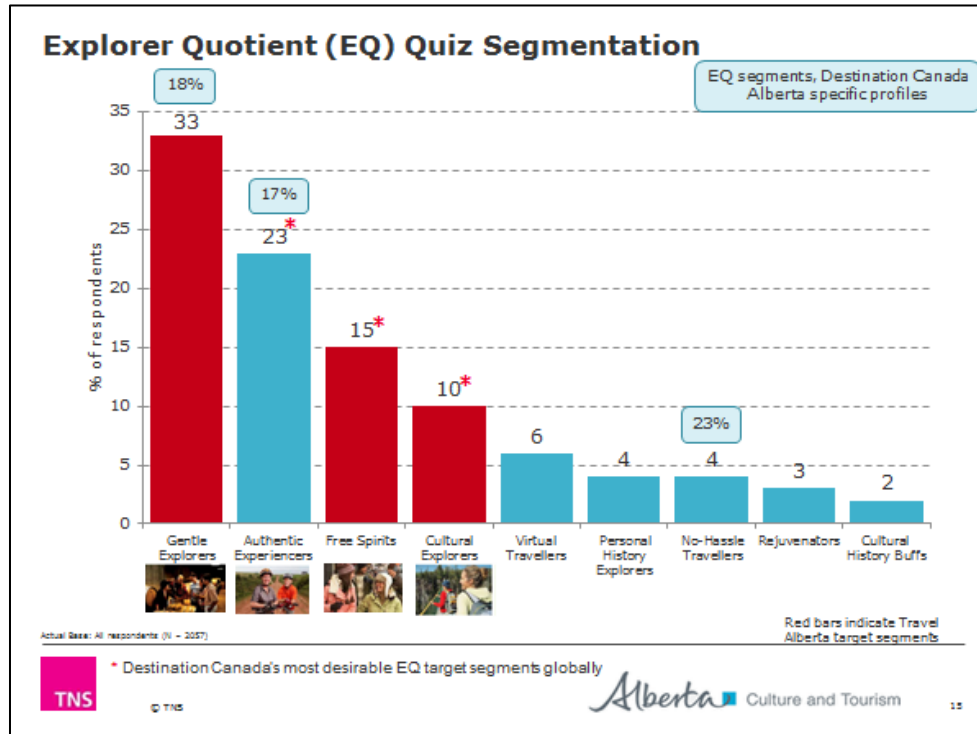
Region	Quota	Complete
Calgary	700	700
Edmonton	700	700
Canadian Rockies (Canmore, Banff, Jasper)	100	56
Central Alberta (Camrose, Cold Lake, Lacombe, Lloydminster, Red Deer, Wetaskiwin)	200	200
Northern Alberta (Grande Prairie, Fort McMurray, High Level)	200	201
Southern Alberta (Brooks, Lethbridge, Medicine Hat)	200	200

- The data have been weighted by gender, age and region to reflect the demographic composition of the population in Alberta who are 18 years and older according to Statistics Canada's 2011 Census as follows:

	Calgary	Canadian Rockies	Central Alberta	Edmonton	Northern Alberta	Southern Alberta	Totals
Males 18-25	2.27%	0.24%	1.05%	1.87%	1.14%	0.87%	7.44%
Males 26-35	3.32%	0.29%	1.34%	2.51%	1.47%	1.10%	10.04%
Males 36-49	4.46%	0.46%	1.94%	2.91%	1.99%	1.59%	13.34%
Males 50-64	3.83%	0.52%	1.86%	2.69%	1.87%	1.69%	12.45%
Males 65 +	1.77%	0.29%	0.99%	1.46%	0.94%	1.08%	6.53%
Females 18-25	2.22%	0.22%	0.99%	1.84%	1.05%	0.84%	7.17%
Females 26-35	3.32%	0.29%	1.35%	2.39%	1.39%	1.08%	9.82%
Females 36-49	4.39%	0.46%	1.96%	2.84%	1.91%	1.57%	13.12%
Females 50-64	3.75%	0.48%	1.86%	2.69%	1.73%	1.70%	12.22%
Females 65 +	2.23%	0.29%	1.18%	1.91%	1.01%	1.24%	7.86%
Totals	31.56%	3.54%	14.52%	23.11%	14.49%	12.77%	100.00%

3. Who are the hosts?

3.1. EQ Quiz Segmentation



- VFR hosts in Alberta tend to be from the 3 most desirable EQ segments identified by Destination Canada, however, the largest is the “Gentle Explorers” segment, also a very desirable segment for Alberta as they enjoy and have a tendency to return to past destinations, among other things.
 - “Gentle Explorers” (33% in this study) tend to be those who like to return to past destinations and enjoy the security of familiar surroundings. They appreciate convenience, relaxation and typically look for all the comforts of home.
 - Gentle Explorers make up a sizable portion of the Alberta population, at 18%.
 - “Authentic Experiencers” (23% in this study) are somewhat like improvisational artists. They like to explore nature, history and culture, all on the path to personal development.
 - “Free Spirits” (15% in this study) tend to be thrill-seeking hedonists; their travel satisfies their insatiable need for the exciting and the exotic.
 - “Cultural Explorers” (10% in this study) tend to be very active travelers who enjoy frequent weekend escapes. Always on the move, they immerse themselves in nature, local culture and history.

Gentle Explorers

- The largest segment is “Gentle Explorers” which include 33% of respondents surveyed



Characteristics

- They like returning to past destinations
- Enjoy the security of familiar surroundings
- Seek the most comfortable places, avoid the unknown
- Like well-organized travel packages and guided tours
- They think “Travel should be fun, not extra work”
- If it’s fun, chances are they’ll come back

Most likely to be seen at...

- Branded hotels
- Hotel pool
- Spa
- Cottage
- Organized tour
- Main attractions
- Golfing/Fishing

Travel values

- **Comfort** – seek familiar surroundings
- **Package Travel** – like organized tours that leave decision-making to others
- **Selective** – desire luxury, exclusivity and pampering
- **Structure** – prefer pre-planned trips that leave little room for error



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Authentic Experiencers

- The 2nd largest segment is “Authentic Experiencers”, including 23% of respondents.



Characteristics

- Appreciate both the beauty of natural and cultural environments
- Enjoy using all of their senses when they explore
- Quickly adapt to personal challenges and risks
- Figure out how to meet the most of every situation
- Want to be fully immersed in travel experience and tend to stay away from group tours and rigid plans

Most likely to be seen at...

- Nature reserves
- World heritage sites
- Hiking trails
- Museums
- Home-stays
- Campsites

Travel values

- **Learning travel** – like to learn everything about a place, time, or culture
- **Nature** – enjoy vast natural settings and wonders
- **Cultural immersion** – prefer integrating into the local culture
- **Personal development** – seek self-improvement through understanding others



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Free Spirits

- The 3rd largest segment is “Free Spirits” which includes 15% of respondents surveyed



Characteristics

- Thrill-seeking hedonists, travel satisfied their insatiable need for the exciting and exotic
- Like the best of everything and want to be surrounded by others who feel the same way
- Lots of energy and want to see and do everything
- Young or young-at-heart, travel for the thrill and emotional charge

Most likely to be seen at...

- Luxury hotel
- Tourism hot spots
- Top restaurants
- Night clubs
- Group tours

Travel values

- **Sample travel** – like to see and experience a bit of everything
- **Constant exploration** – always plan for the next trip
- **Companion experiences** – prefer traveling with like-minded people
- **Indulgence** – seek the best you can afford



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Cultural Explorers

- The 4th largest segment is “Cultural Explorers” which includes 10% of respondents surveyed



Characteristics

- Constantly seek opportunities to embrace, discover and immerse themselves of the culture, people and settings of places visited
- Not content to just visit historic sites and watch from the sidelines – they want to participate in the modern-day culture as well
- They often attempt to converse with locals, attend local festivals or go off the beaten path to discover “how people truly live”

Most likely to be seen at...

- Heritage sites
- Cultural events
- Museums
- Festivals
- Bed & Breakfast Hotels
- Hostels

Travel values

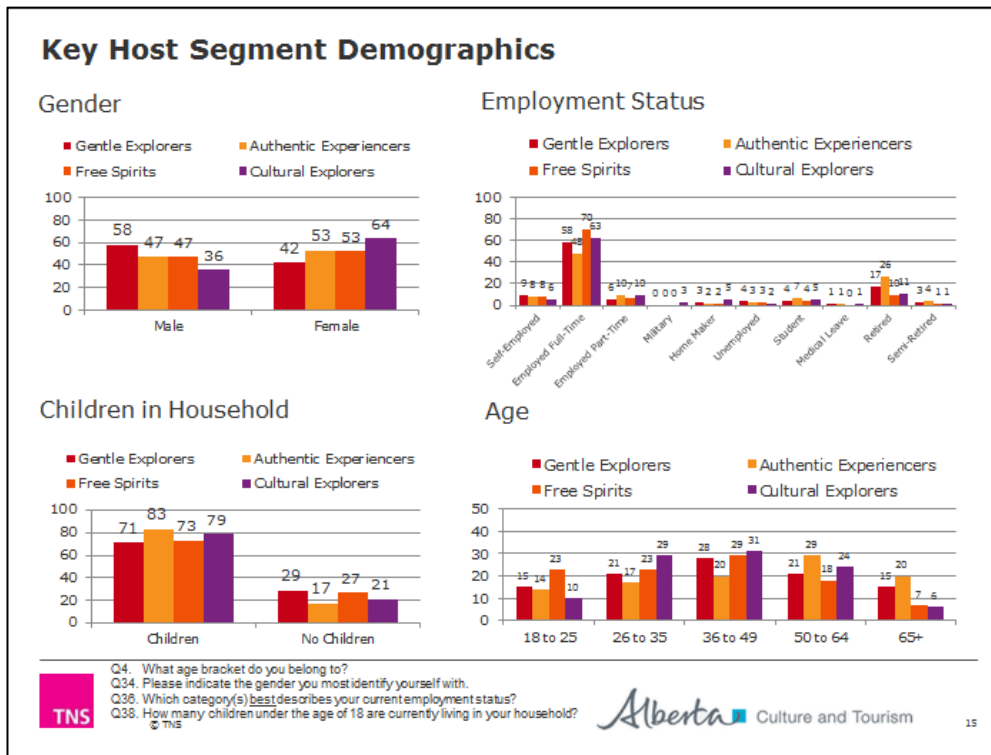
- **Companion experiences** – prefer traveling with like-minded people
- **Living history/culture** – enjoy ancient history and modern culture
- **Learning travel** – seek to learn everything about a place, time, or culture
- **Constant exploration** – always plan for the next outing



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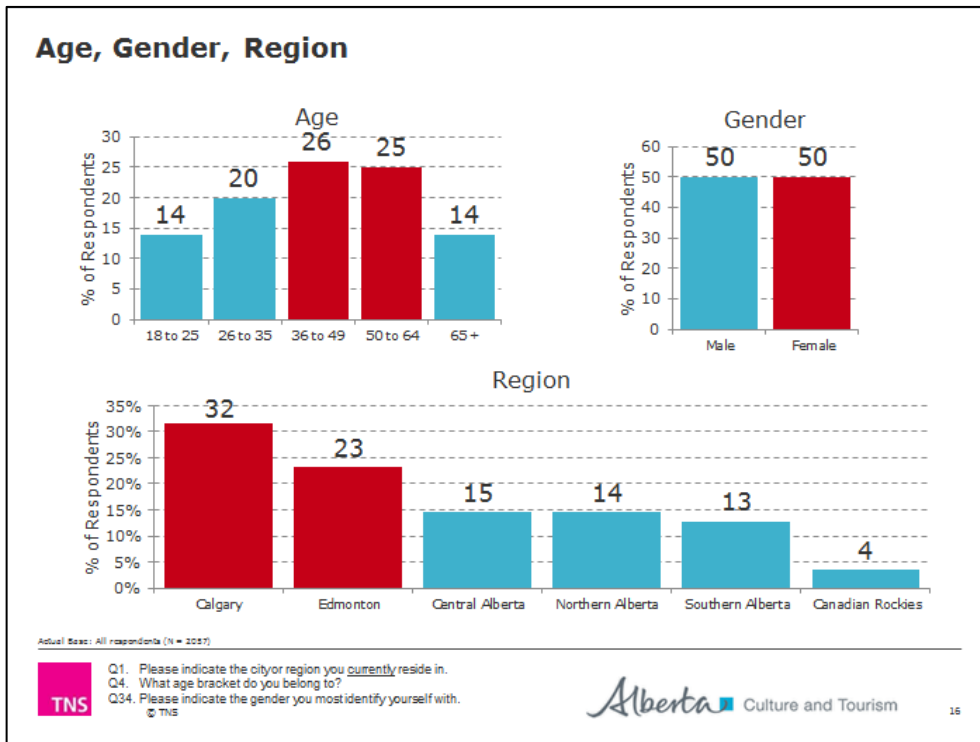
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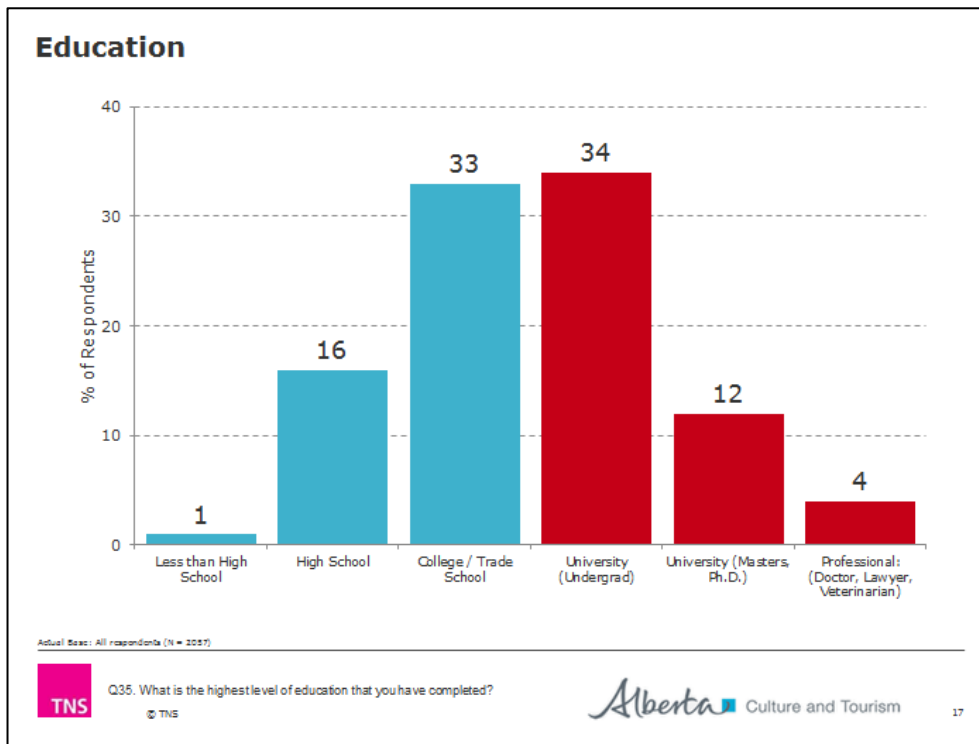
- Gentle Explorers have the highest representation of males (58%) and the highest representation of kids in household (29%).
- Authentic Experiencers have a higher likelihood to be retired (26%), not have kids in the household (17%) and be 50 years of age or older (49%).
- Free Spirits are more likely to be employed full time (70%) with higher than average 18-25 year olds (23%).
- Cultural Explorers tend to skew female (64%) and are more likely to be aged 26-49 years (60%) and least likely to be 18-25 or 65+ years of age.
- Although no quotas were set on these EQ segments, and in this study they are built on hosts (not travellers/visitors), their demographic skews are consistent with those seen in Destination Canada’s EQ segments.

3.2. Demographic Profile of Participants



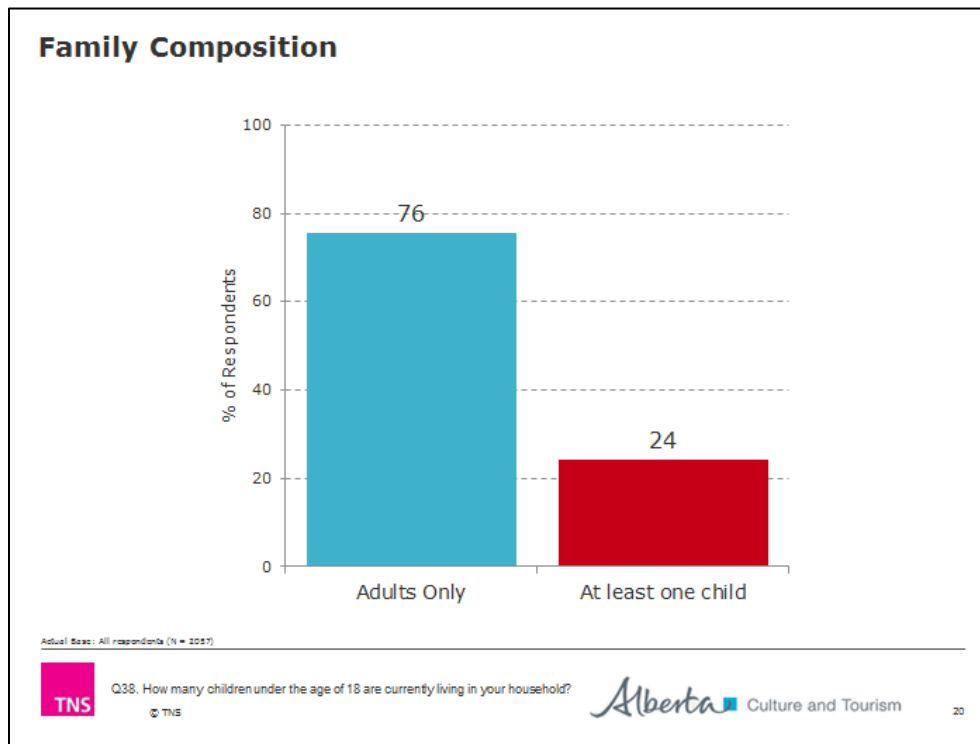
- There was a wide range of hosts represented in the survey, weighted on age, gender and region to Alberta’s general population distribution.

3.3. Education of Participants



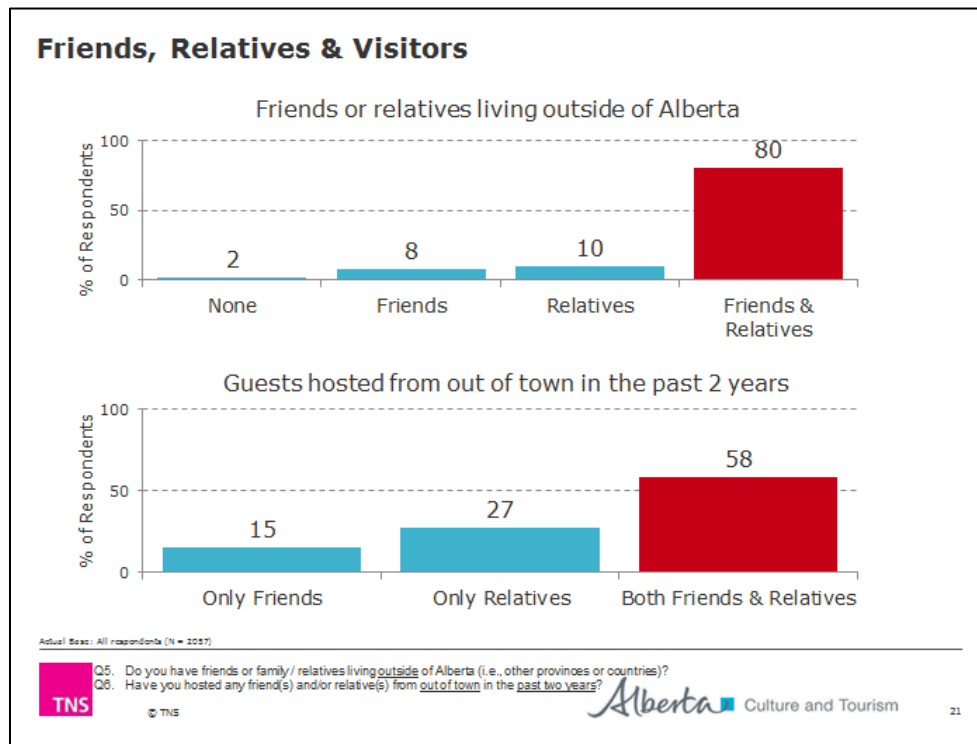
- Half (50%) of the hosts in this study are university educated with 34% having an undergraduate degree and the remaining 16% indicating they have an advanced degree (i.e., Master’s, Ph.D. or Professional degree).
- A significant minority, 17%, have high school or less.

3.4. Family Composition



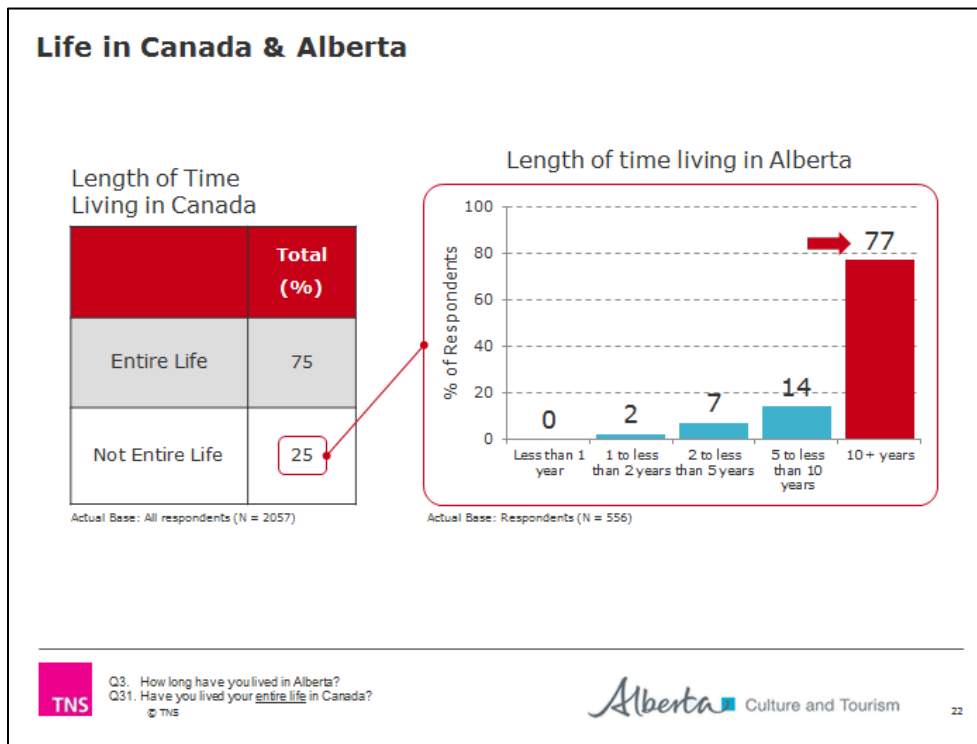
- The majority (76%) of VFR hosts in this survey indicate they do not have children living in the home
- Although not shown in this chart:
 - 4% have at least one child 2 years old or younger
 - 14% have at least one child aged 3 to 12 years old
 - and 11% have teenagers aged 13 to 17

3.5. Friends, Relatives & Visitors



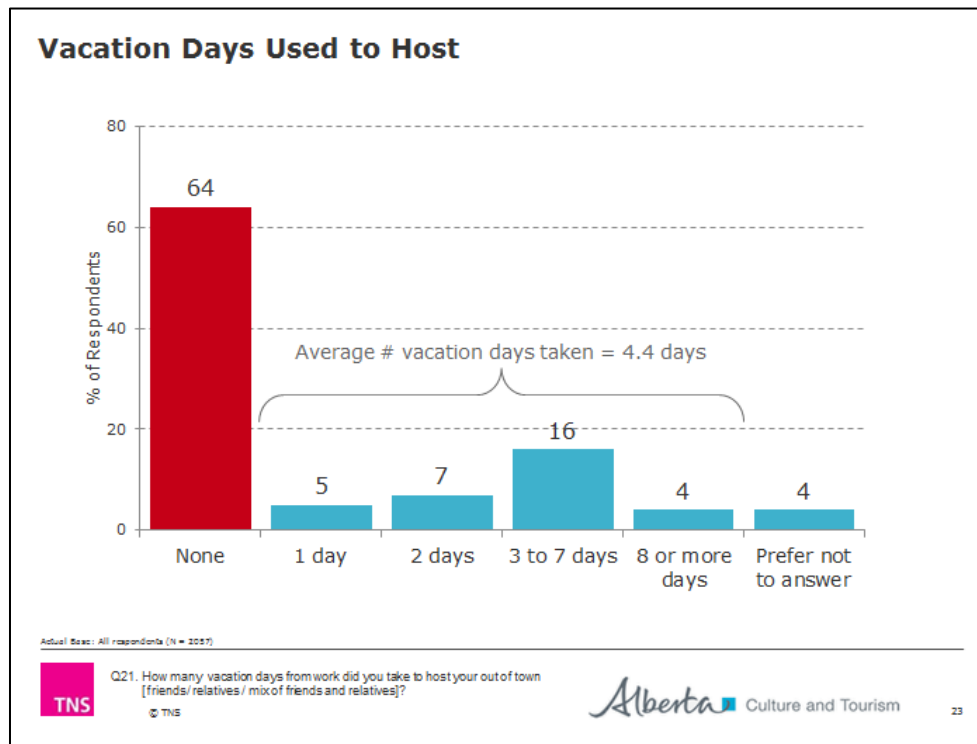
- 98% of hosts have friends or family outside of Alberta - the majority of hosts (80%) indicate they have both friends as well as relatives living outside of Alberta.
- In the past two years, about a quarter (27%) of individuals indicated they only hosted visits from relatives and just over 1 in 6 indicated they have only hosted friends, however, the majority (58%) have hosted visits from both. This is good news as it means that most hosts in this study are open to a broader range of visitors from out of town (i.e., both friends and family, not only one or the other).
- Hosts who were aged 65+ years were more likely to host both friends and family (65%) and least likely to host only friends (9%).

3.6. Life in Canada & Alberta



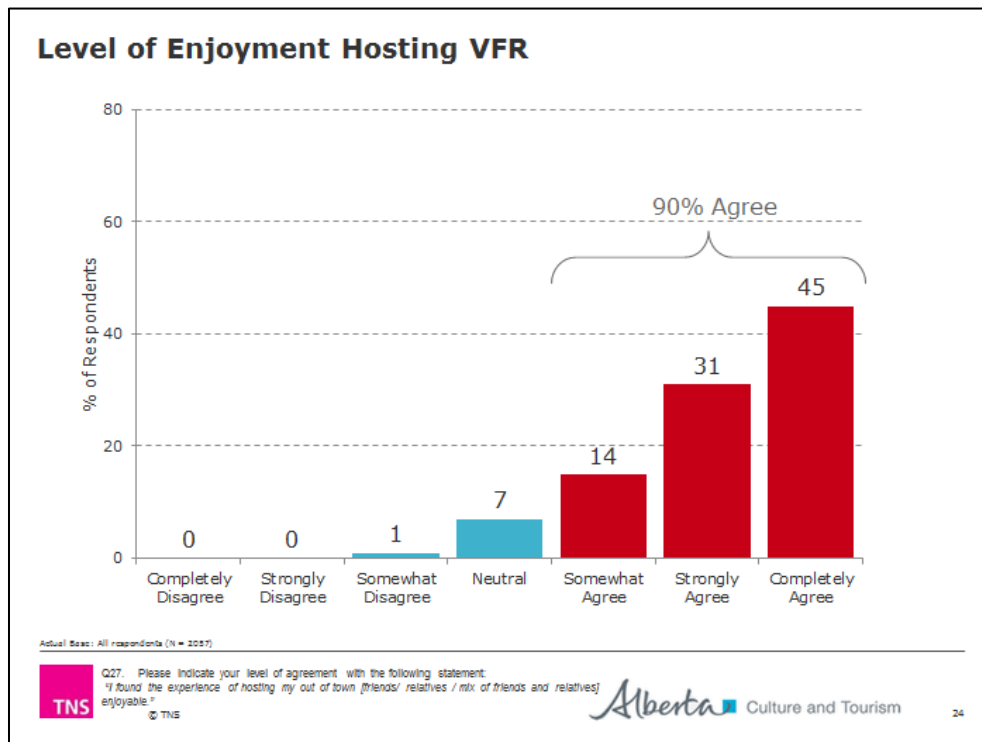
- Most hosts in this study (75%) indicate they've lived in Canada their entire life.
- Of the 25% who have not, the large majority (77%) have lived in Alberta for 10 or more years.
 - A minority of 9% say they have lived in Alberta for less than 5 years.
- It is worth noting that reaching immigrants, especially recent arrivals, through online panels is comparatively hard. It's therefore likely that they are under-represented within this sample.

3.7. Vacation Days Used to Host



- More than a third (36%) of respondents reported taking vacation days from work to host their most recent visiting friends and relatives.
- The average number of days taken to host VFR was 4.4 days:
 - Half of the 36% who said they used vacation days took between 3 and 7 days to host;
 - A small number (4%) of hosts indicated they took off more than 7 days.

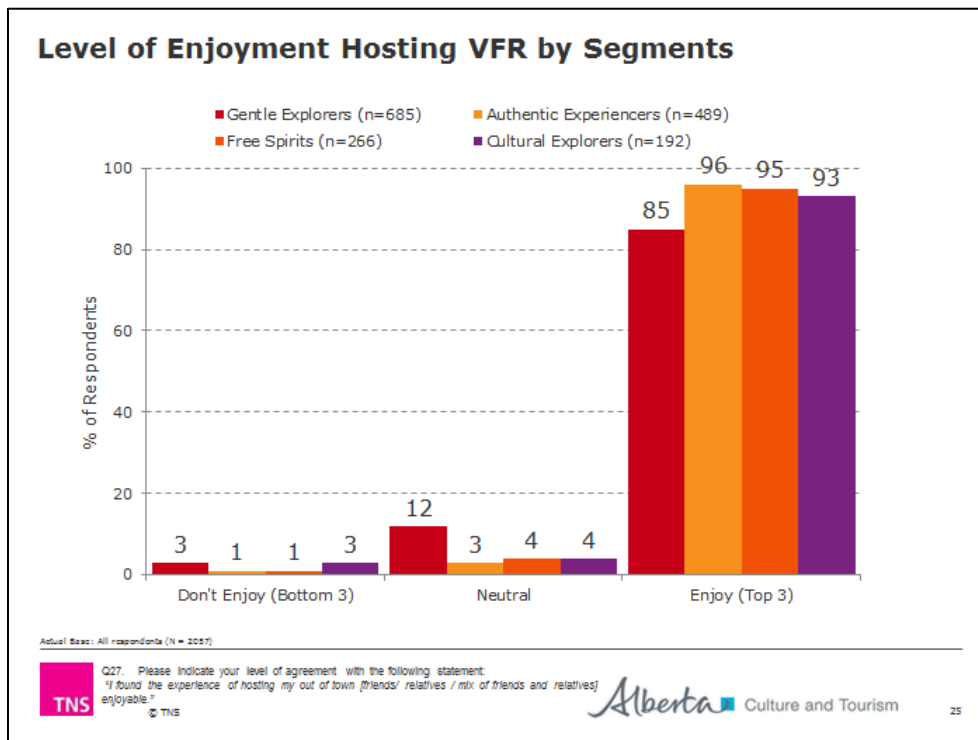
3.8. Level of Enjoyment Hosting VFR



- Hosts were asked to indicate the extent to which they agree or disagree with the following statement regarding their most recent hosting experience, using a 7-point scale ranging from 1, "Completely Disagree", to 7, "Completely Agree":

"I found the experience of hosting my out of town [friends / family / mix of friends and family] enjoyable."

- VFR is a very enjoyable activity for hosts in Alberta with almost half (45%) who completely agree and the lion's share (90%) who said they agree (top 3 points on the scale) with the statement.



- The results differ meaningfully across EQ segments, with a higher percentage of respondents in each of the following EQ segments indicating they find the experience of hosting their out of town guests enjoyable:
 - The three main target segments enjoy hosting more than average:
 - Authentic Experiencers (96% enjoy, representing 23% of hosts);
 - Free Spirits (95%, 15% of hosts);
 - Cultural Explorers (93%, 10% of hosts).
 - Gentle Explorers (representing 33% of hosts) were one of the most neutral segments (12%), surpassed only by Rejuvenators (at 26% neutral).


3.9. Words Used to Spontaneously Describe Hosting VFR

Words Used to Describe Hosting (Spontaneous)

Words Hosts Used to Describe VFR Experiences	Total (%)
Good, great, nice	45
Fun, interesting, good times	29
Happy, pleasurable, glad, joy	23
Satisfying, content, pleased, gratified	12
Comfortable, relaxing, stress-free, easy, peaceful	11
Informative, knowledgeable, eye-opening, enlightening, educational, learning experience	6
Accommodating, welcome, warm	5
Awesome, amazing, wonderful, outstanding, fantastic, excellent	5
Beautiful	4
Different, break in daily routine, refreshing	4
Grateful, thankful	3
Love	3

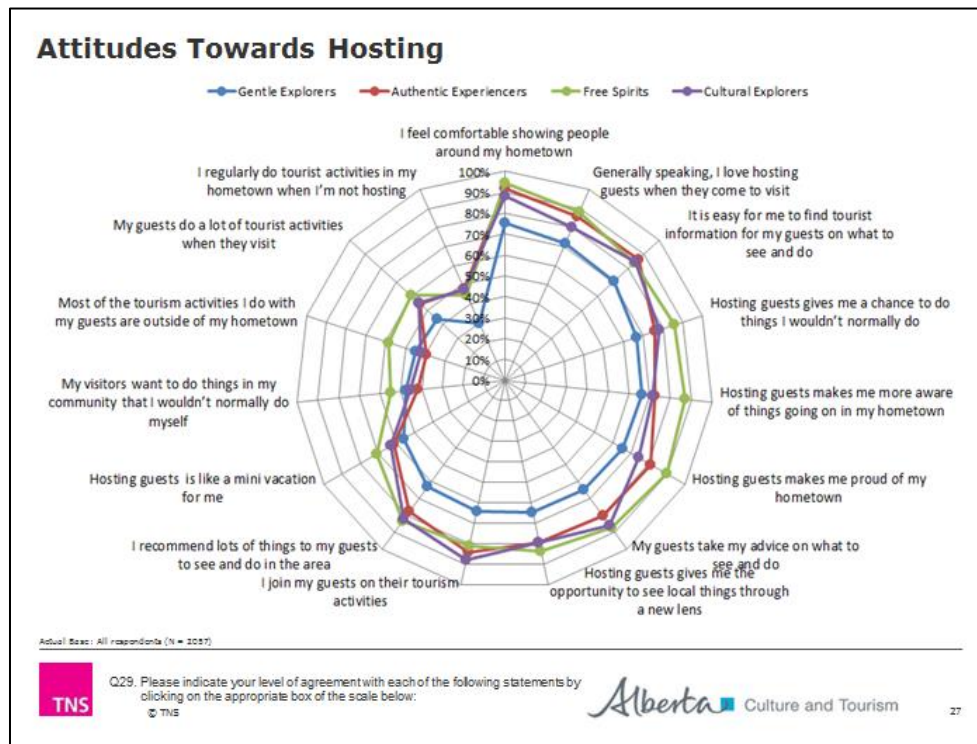
Actual Base: All respondents (N = 2057)

Q28. What word(s) best represent how you felt about hosting your [friends/relatives / mix of friends and relatives] from out of town?

TNS  26

- In a completely open-ended, unprompted fashion, respondents were asked to give up to 5 words that best represent how they felt about hosting.
- Reinforcing the fact that 90% agree the experience is enjoyable, words used by hosts to spontaneously describe their experiences hosting VFR were positive –Alberta Culture and Tourism and Travel Alberta should reinforce these words and themes in communications:
 - Almost half (45%) say it was generally “good/great/nice”
 - Almost a third (29%) say their VFR was fun, interesting and that they had good times
 - About a quarter (23%) describe VFR visits as happy, pleasurable, glad, joyous
 - While 11% say it was relaxed, comfortable, stress-free, easy or peaceful.

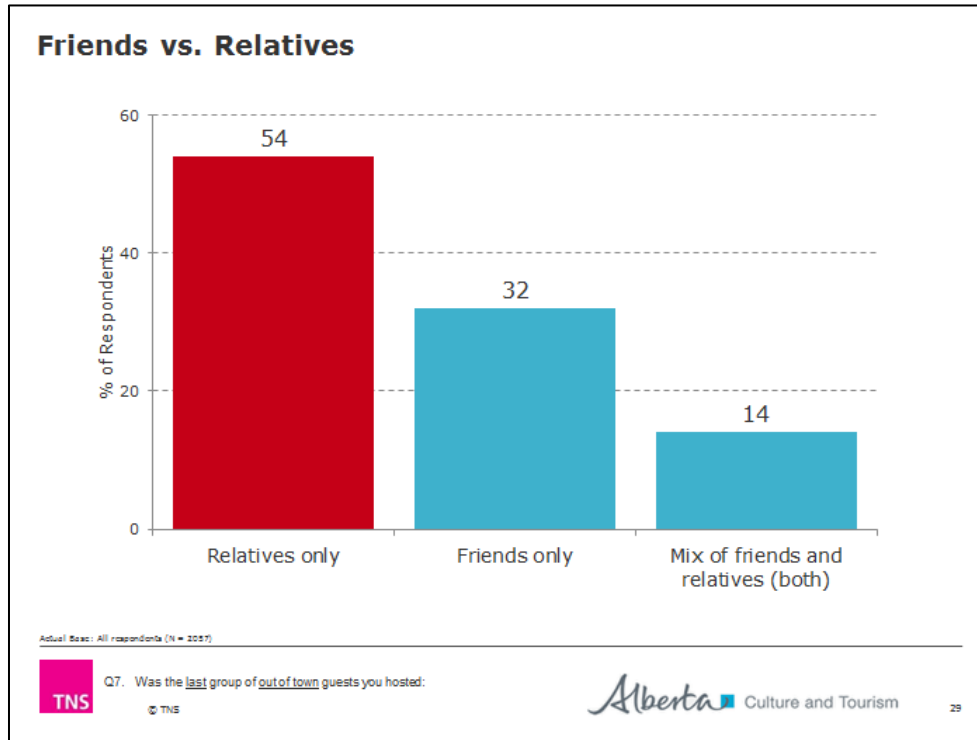
3.10. Hosts' Attitudes Towards Hosting



- The chart above shows the percentage of hosts who agreed (top 3 points on a 7-point scale ranging from 1, "Completely Disagree" to 7, "Completely Agree") with each of several statements about VFR.
- Although there are some differences in the overall percentage of each key EQ segment indicating they agree, overall the trend is the same with respect to which statements they agree with most and least. However, although the trend is similar, it should be noted that fewer of the "Gentle Explorers" agree with many of the statements compared to other EQ segments.
 - Overall, Albertan hosts indicate they feel very comfortable showing people around their hometown. They love hosting when guests come to visit, they find it easy to find out about tourist information for their guests and hosting gives the host a chance to do things they normally wouldn't.
 - The statements key EQ segments disagreed with most were ones that suggested they regularly do tourist activities when they aren't hosting, that their visitors want to do things in their community that the host wouldn't normally do themselves and that the tourism activities they do with their guests are typically outside of their hometown.

4. Who are the Visitors?

4.1. Visitor Group Composition: Relatives vs. Friends



- Although 80% of hosts in this study said they have both friends and relatives living outside of Alberta and 58% indicated that they have hosted both friends and relatives in the past two years, most (54%) report that the **last** visit they had was comprised of relatives only.
- Older hosts (i.e., 55 years old and more, 66%), those who are retired (60%) and hosts who have lived in Alberta for 10 or more years (57%) were more likely to host relatives only than others.
- Although much less frequent than hosting “homogenous” groups of relatives (54%) or friends (32%), 14% indicate their last VFR was a blend of friends and relatives in the same trip.

4.2. Visitor Group Composition: Where Visitors Are From

Where Visitors are From

Where guest is visiting from	Total (%)	Last group composition		
		Friends	Relatives	Both
Somewhere else in Alberta	30	31	25	48*
Somewhere else in Canada	61	55	64*	64*
Somewhere in the US	10	10	8	18*
Other	5	6	4	8

* Significant difference at the 95% confidence level

Actual base: All respondents (N = 2027)

TNS Q10. Where were your out of town [friends/relatives / mix of friends and relatives] visiting from? Alberta Culture and Tourism 30

- Respondents were asked both about the type of visitors they hosted during their last VFR as well as where their out-of-town friends, relatives or mix of friends and relatives were visiting from (visitors could be from more than one place so multiple responses were allowed).
 - The reason why totals add up to more than 100% is because a group of visitors may have people from different places. Those who hosted a group of both friends and relatives together have people from multiple places, perhaps indicating celebrations such as weddings or reunions, etc.
- When asked about their most recent guests, the majority (91%) of visitors are coming from within Canada with a significant minority (30%) coming from within Alberta and the majority (61%) from within Canada but outside of Alberta:
 - The most frequent visitors from outside of Alberta within Canada come from British Columbia (26%), Ontario (18%), and Saskatchewan (11%).
- Only 15% of VFR guests are coming from outside of Canada with 10% coming from the USA and 5% from outside of North America.


4.3. Visitor Group Composition: Numbers and Ages of Visitors

Number and Age of Visitors

Number of people in VFR group	Total (%)	Age group visiting					
		55+	30-54	18-29	13-17	3-12	0-2
1 Visitor	25	21*	19*	21*	2	1	-
2 Visitors	40	47*	29*	28*	8	5	8
3 Visitors or More	34	33	52*	51*	90*	95*	92*
Mean # visitors	3.0	1.8	2.0	2.0	1.9	2.0	1.2
Median # visitors	2.0	2.0	2.0	2.0	1.0	2.0	1.0

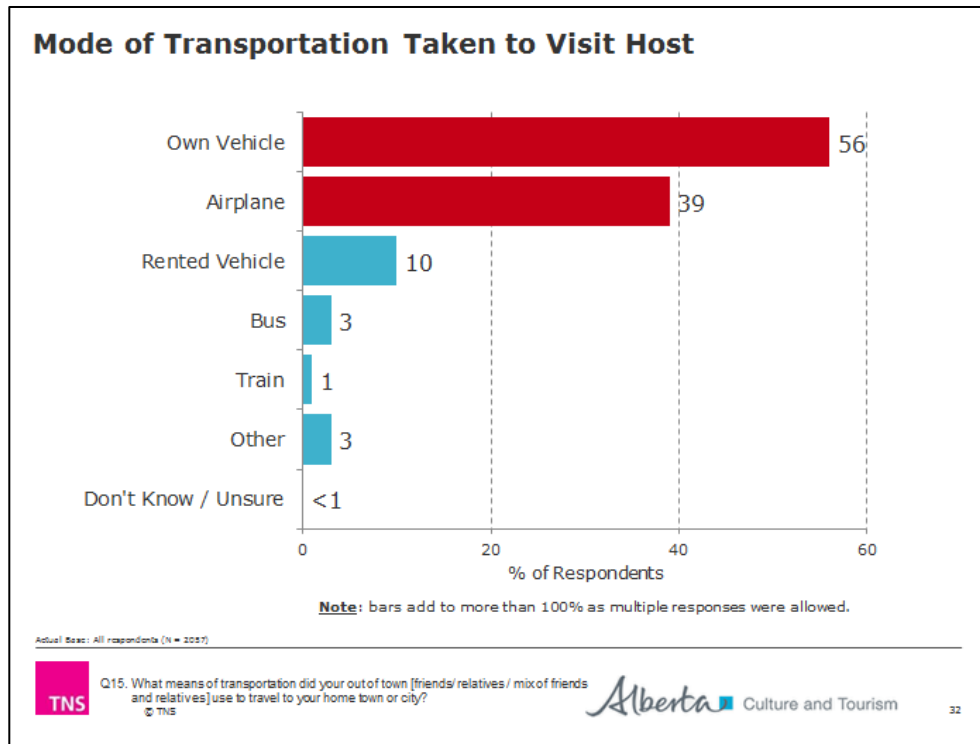
• Significant difference at the 95% confidence level
Total column is a volume sum of answers from columns to the right

Actual Base: All respondents (N = 2057)

TNS Q14. Please indicate the number of people in each of the following age categories that were in the group that came to visit.  31

- The overall average number of VFR visitors is 3 and the median number of visitors is 2. The majority (65%) comprise 1 or 2 visitors (25% and 40%, respectively).
- When visiting groups are comprised of 1 or 2 people, they tend to be adults 18 years or older, however, as visiting group size grows, significantly more young children and infants are present in the groups.

4.4. Mode of Transportation Taken to Visit Host

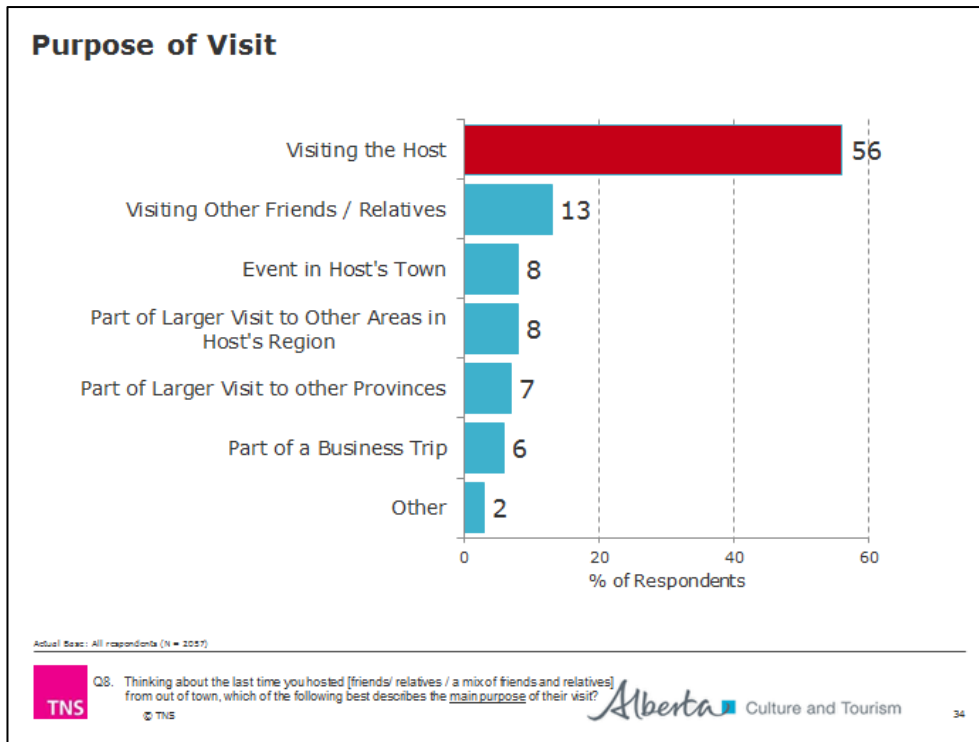


- Most hosts say visitors came in their own vehicles (56%), 39% took airplanes and a small proportion (10%) rented vehicles.
 - A very small percentage took a bus (3%), the train (1%) or some other form of transportation.
- Those who used their own vehicles (56%), tend to be from households with lower incomes (68% with less than \$30K income/household per year), retired (62%) and older (59% 50 to 64 year-olds and 61% 65+ years old).
- Not surprisingly, those most likely to take an airplane were from outside of Canada and the US (71%) or were from the US (58%).

5. Characteristics of VFR Trips

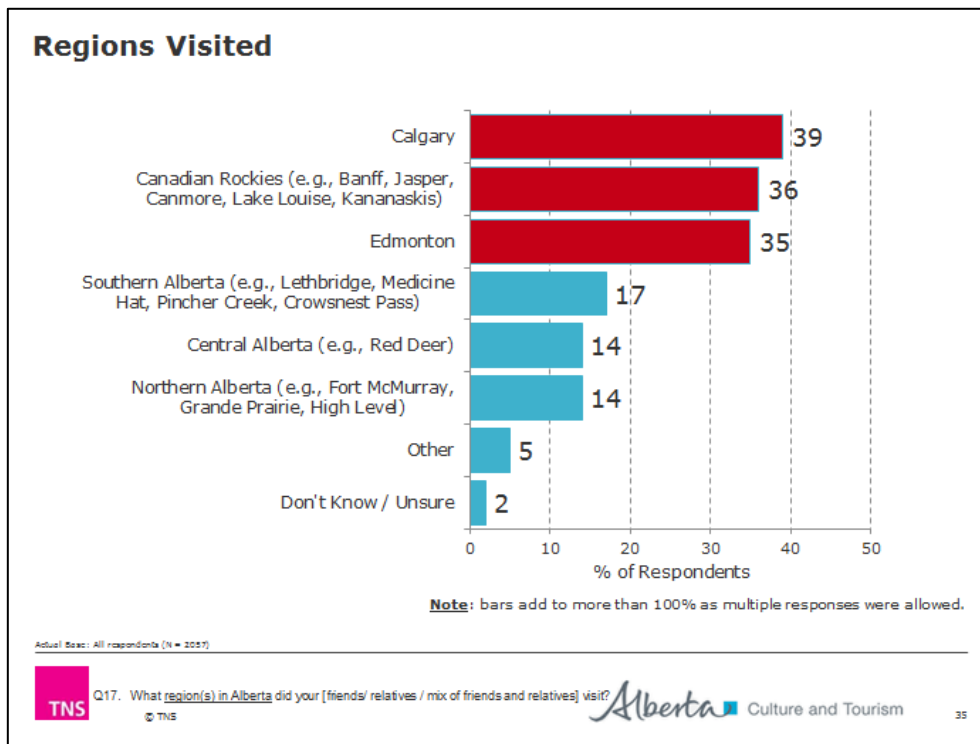
5.1. Purpose & General Characteristics of the Visit

5.1.1. Purpose of Last VFR Hosted



- Although hosts indicate that visiting friends and families had a variety of reasons for their most recent visit, the main purpose of the VFR was visiting the host (56%) and/or visiting other friends and family (13%).
- Some respondents (8%) came primarily to attend some sort of event in the host’s town or as part of a larger visit to other areas in the host’s region (8%) or other provinces within Canada (6%).
- The main purpose of the visit didn’t vary meaningfully across other groups, including the EQ Quiz segments.

5.1.2. Regions Visited by the Visitor(s)



- Hosts were asked what regions in Alberta their guests visited during their stay. This didn't vary meaningfully across subgroups or EQ segments.
- The large urban cities, specifically, Calgary (39%) and Edmonton (35%) and the Canadian Rockies (36%) are what attracted the largest number of visitors, not surprisingly.
- However, almost one in five (17%) also visited smaller towns in Southern Alberta (e.g., Lethbridge, Medicine Hat, Pincher Creek, Crowsnest Pass), and just under one in seven (14%) also visited Central (e.g., Red Deer) and Northern Alberta (e.g., Fort McMurray, Grande Prairie, High Level).
- As mentioned earlier, approximately 5% also visited other regions and/or provinces as part of a larger trip to the area.

Regions Visited by Location of Host

Regions Visited	Total (%)	Location of Host					
		Calgary	Canadian Rockies**	Edmonton	South Alberta	Central Alberta	North Alberta
Calgary	39	79	35	23	25	24	10
Canadian Rockies (e.g., Banff, Jasper, Canmore, Lake Louise, Kananaskis)	36	51	73	33	17	27	22
Edmonton	35	12	34	84	10	31	32
Southern Alberta (e.g., Lethbridge, Medicine Hat, Pincher Creek, Crowsnest Pass)	17	13	4	5	74	12	2
Central Alberta (e.g., Red Deer)	14	8	4	11	5	52	4
Northern Alberta (e.g., Fort McMurray, Grande Prairie, High Level)	14	2	-	6	2	2	78
Other	5	5	4	5	5	9	4
Don't Know / Unsure	2	1	1	1	2	6	1

** Caution Small base size n=56

□ = Regions visited more often by guest in host region

Actual base: All respondents (N = 2057)

Note: bars add to more than 100% as multiple responses were allowed.



Q17. What region(s) in Alberta did your [friends/ relatives / mix of friends and relatives] visit?

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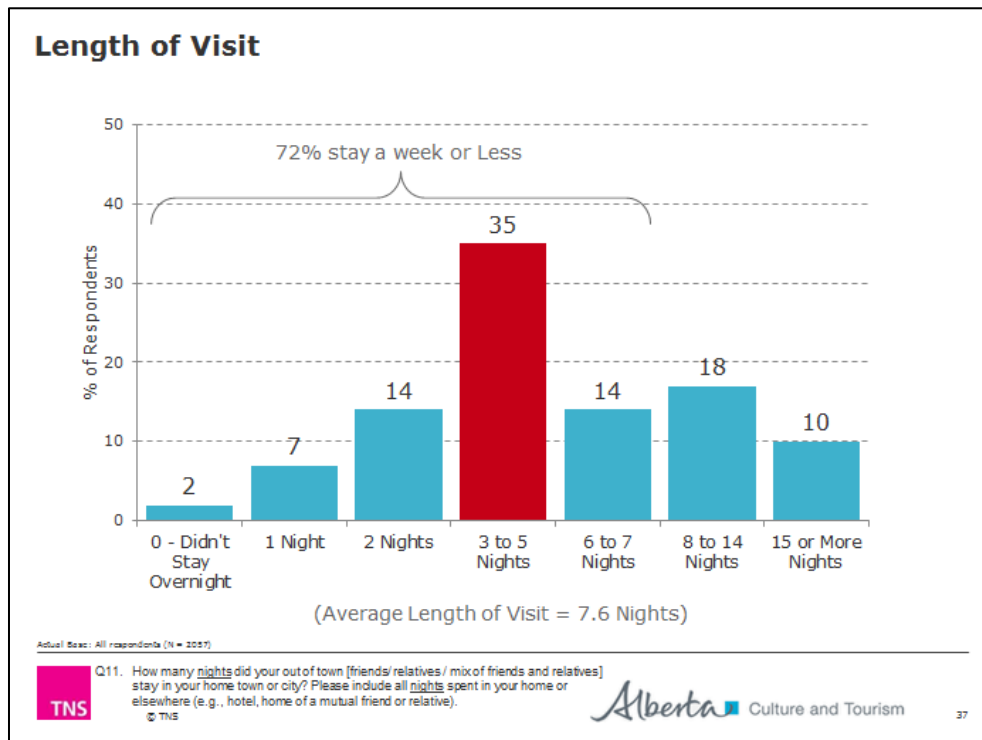
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- Not surprisingly, guests visited their host city/region (73-84%) more than any other region. However, this was least likely the case in Central Alberta (52%).
- All regions visited Calgary to some degree (23-35%), with fewest visitors from Northern Alberta (10%).
- Similarly all regions visited the Canadian Rockies to some degree (22-33%), with the most visitors from Calgary (51%) and the fewest visitors from Southern Alberta (17%).
- Visitors to Edmonton were least likely to come from Calgary (12%) and Southern Alberta (10%).

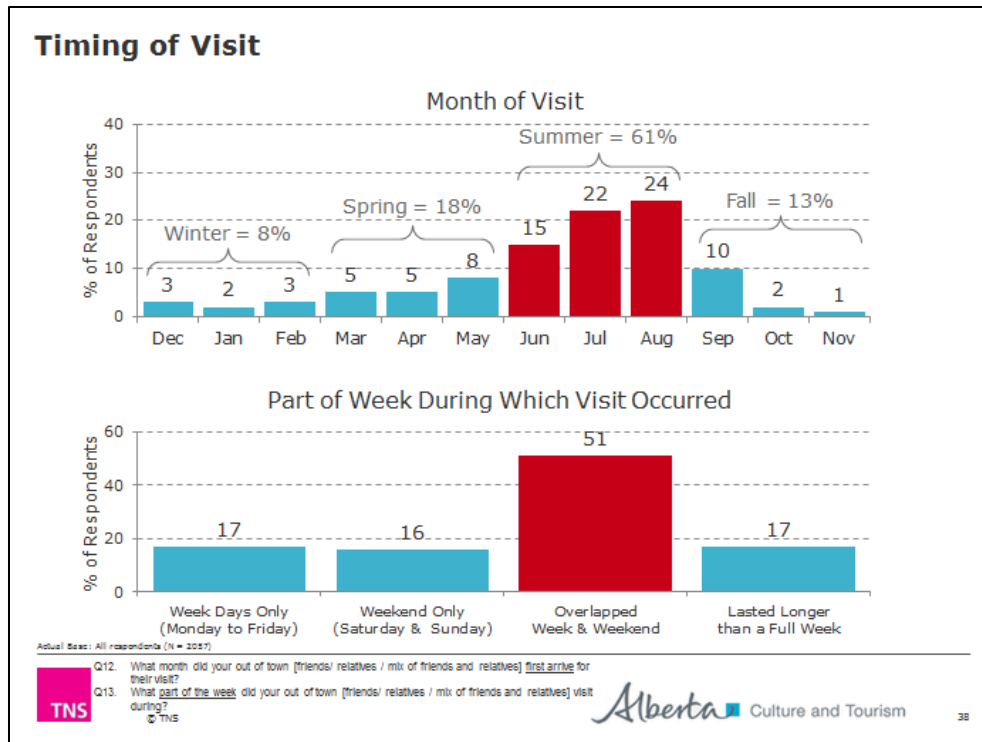
5.1.3. Length & Timing of Visit

Length of Visit



- While the average visit length was just over one week (mean = 7.6 nights), a wide range of visit lengths was observed in this research, ranging from 0 nights for a small number of visitors likely representing a “drop-in” on the way to another destination, through to 15 nights or more.
 - The majority of visits (72%) were for a week or less and about one in five (21%) said they stayed for a night or two.
 - The most frequent length of stay was between 3 and 5 nights (35%), however, just over 1/4 of visits (28%) were for more than a week, with 10% of hosts indicating their visitors stayed for 15 nights or more.
 - The longer the visit, the more likely it is that visitors are from outside of Canada. When trips are between one and two weeks, visitors tend to be from the US or outside of Canada and the US. Visitors that stay longer than two weeks are most likely from outside of North America.

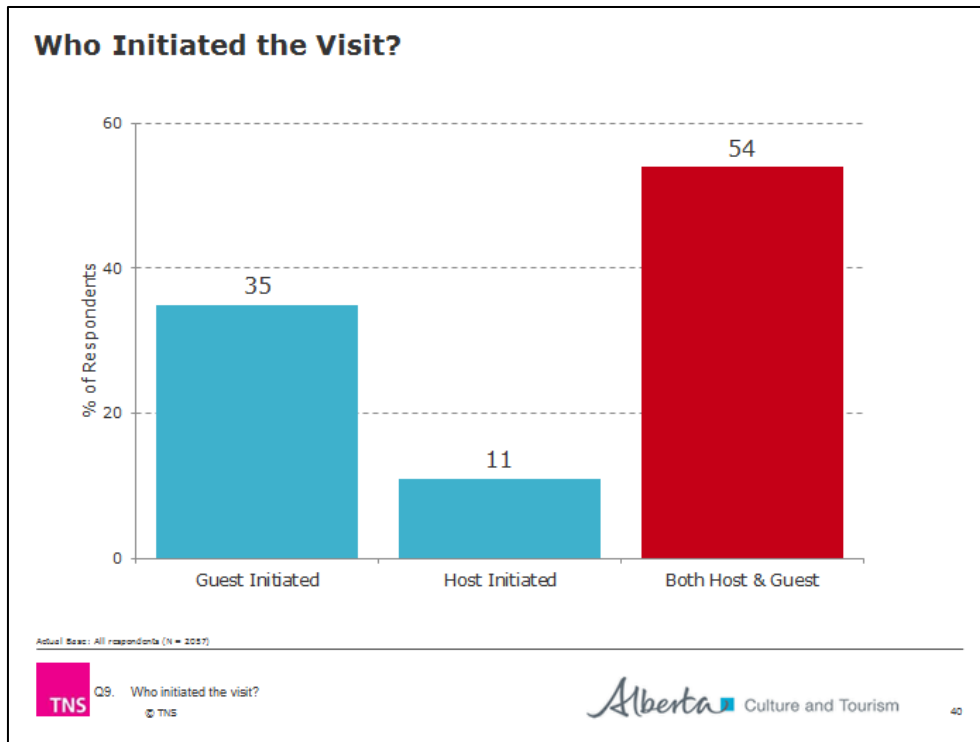
Timing of Visit



- Not surprisingly, most hosts report their VFR trips between May and September (79%), with the bulk (61%) occurring in June, July and August. Although this may be when people most often visit Alberta, it's difficult to say, as the question asks hosts about their most recent visit and the survey was fielded in September.
- The majority of trips (51%) overlapped both the week and the weekend.
- Interestingly, when business was the main purpose of the visit, while they were significantly more likely to only visit during week days than others (40% vs. 17%), many (47%) also took advantage and extended their business trips over the weekend.

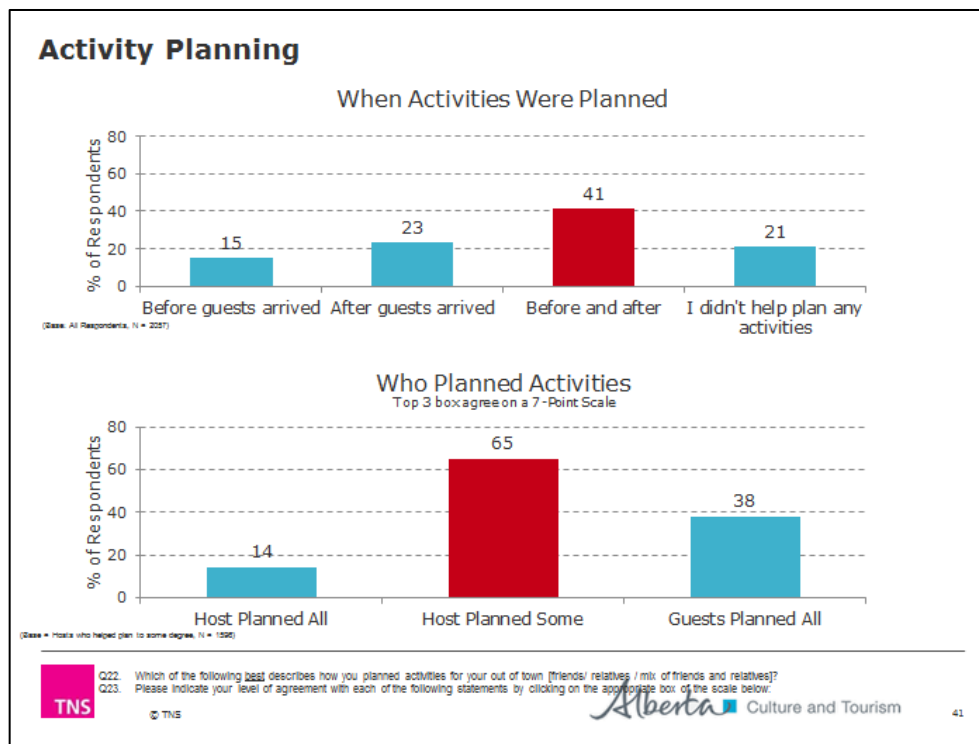
5.2. Role of the Host

5.2.1. Visit Initiation



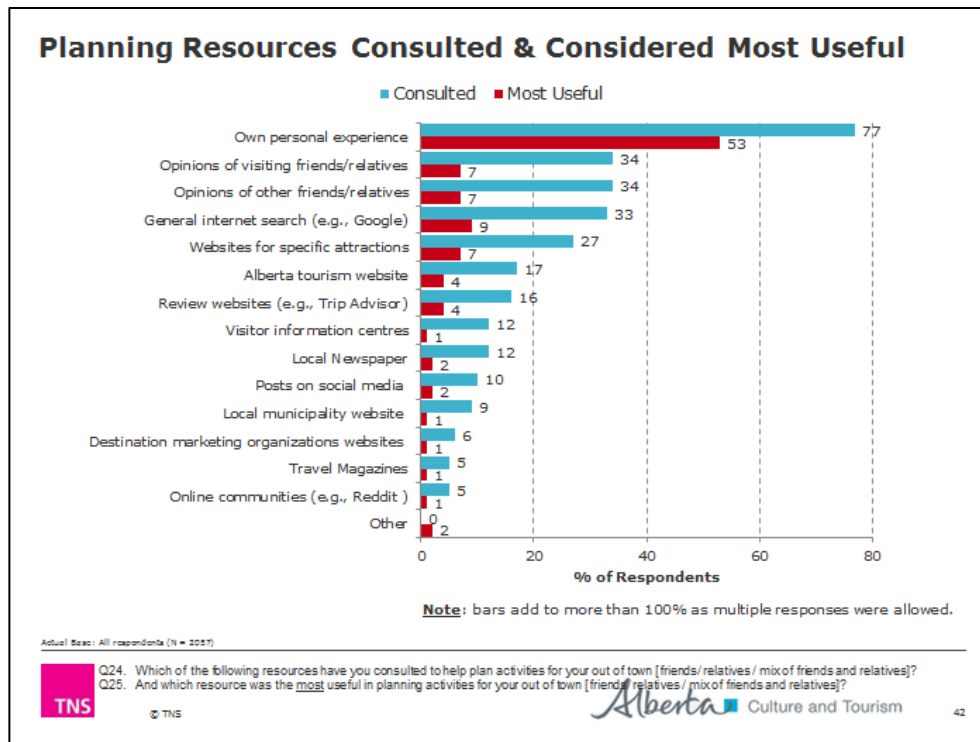
- Not that surprisingly, the host and guest are joint initiators of the visit in the majority of cases (54%), with about 1/3 of guests initiating (35%) on their own. Interestingly, while one might assume the host initiates at least as equally as the guest, the data indicate that only about 1 in 10 hosts (11%), initiated the last VFR trip.
- When the host indicated that the guest initiated, more frequently than other groups, business travelers were the initiators (60%) or when the guest was coming to the host's town for a specific event (52%).
- The "Rejuvenators" (54%), "Cultural History Buffs" (51%), and "Personal History Explorers" (50%) were more likely to initiate visits than other EQ segments.

5.2.2. Activity Planning



- Although for most VFRs planning is a joint effort between hosts and visitors, one in 5 hosts (21%) indicated they weren't involved in any planning at all. This most often occurred when the trip was for business purposes (35% of those whose main purpose was for business). Also, some guests knew exactly what they wanted to do without input from the host – these guests tended to be coming into town for a specific event (53%), or coming into town to visit friends or family other than the host (47%).
- Timing of planning and planning itself are somewhat fluid. Very few hosts (15%) plan activities in advance of the guests arriving. More often plans are made after the guest(s) have arrived (23%) or both before and after guests arrive (41%).

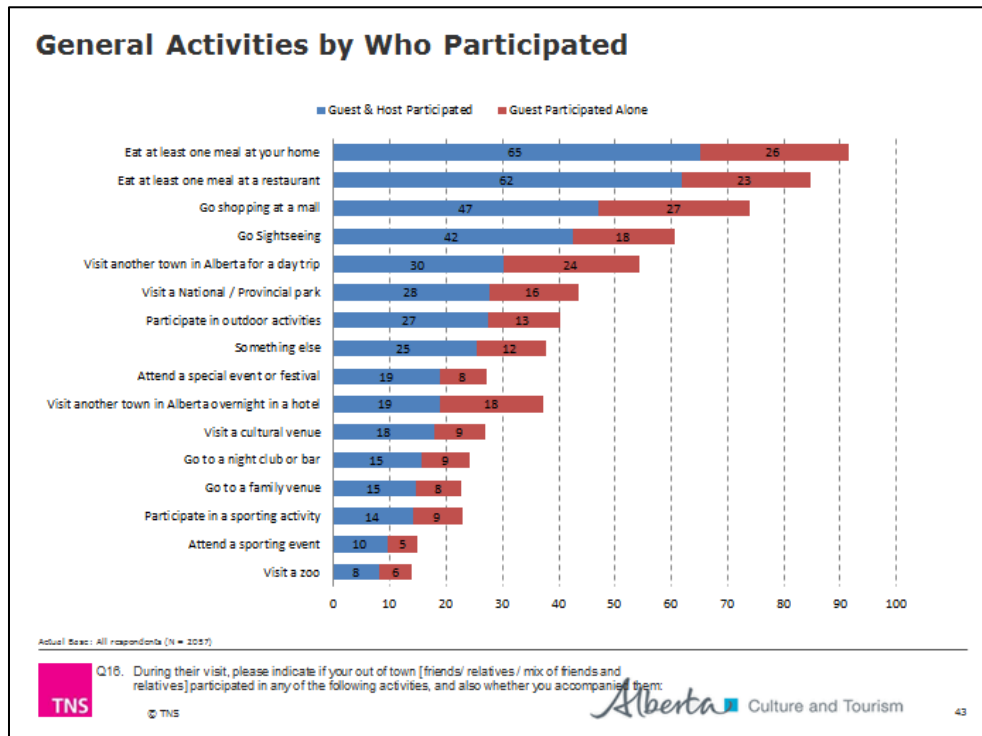
5.2.3. Resources Consulted to Plan Activities



- Hosts consulted a variety of resources to help them plan activities for their VFR, however, the large majority (77%) used their own experience to determine what to do with their friends and/or family. Just over half (53%) indicated that they felt their own experience was the most useful source that they were able to find. This likely is related to the fact that most hosts in this research have lived in Alberta for 10 or more years (77%).
- After personal experience, the opinions of the visiting friends and relatives (34%) and the opinions of other friends and relatives (34%) and general internet searches (33%) were the most widely used sources of activity planning.
- Less than one in five (17%) said they consulted the Alberta Tourism website (travelalberta.com).

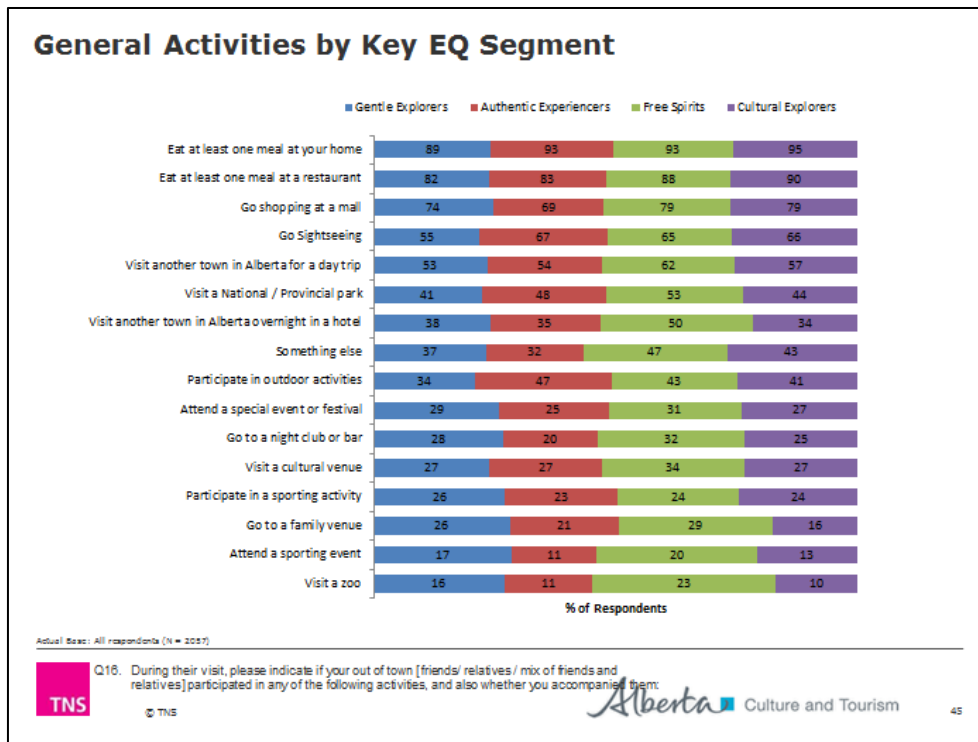
5.3. What is Considered and Done on Visits?

5.3.1. General Types of Activities by Who Participated



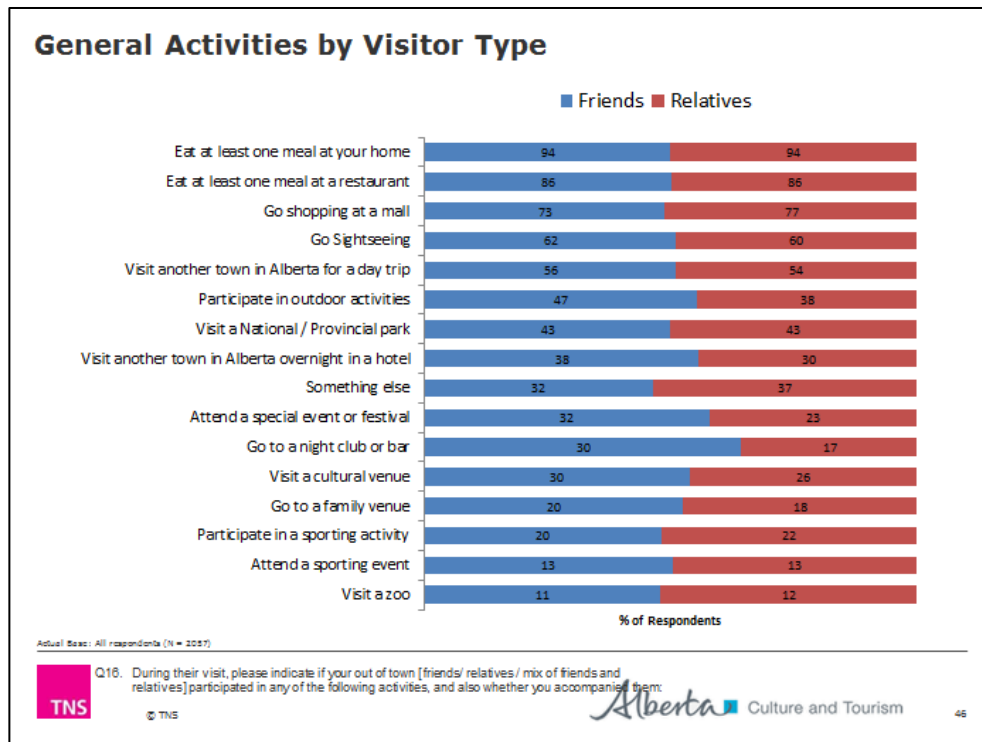
- The most popular activities participated in overall by hosts and guests or guests alone were centered on being together and sightseeing.
 - The top tier activities participated in by hosts and their visitors or by their visitors by themselves were eating at the host's home (91%) and at restaurants (85%) and going shopping (74%).
 - The next tier of activities was sightseeing (60%), day trips to towns in Alberta other than the host's (54%), visiting National Parks (44%) and other outdoor activities (40%).
- It is encouraging that more than half (54%) of guests visited another town in Alberta for a day trip, and 30% of hosts joined them. Further, more than a third (37%) of guests spent a night or more in a hotel in another town, and 19% of hosts joined them.
 - If we conservatively estimate that 80% of hosted groups each year are comprised of three people, on average, and 37% of these guests spend a night in a hotel, and 19% of the hosts join them, this is a substantial number of hotel room nights that is being consumed.
 - This means that VFR brings hotel visitors to the province, and turns around 15% of local residents into hotel guests as well.

5.3.2. General Activities Participated in by Key EQ Segments



- The chart above shows the percentage of hosts who either indicated they participated in each activity with their guests or the guests participated alone split as a function of key EQ segments.
- Interestingly, overall, the most popular general activities remain the same regardless of which segment you're from.
- Some differences across segments within and across activities do exist, most notably:
 - Authentic Experiencers were more likely to participate in outdoor activities than other segments (47% vs. 34% to 43% in other segments) and were the most likely to go sightseeing (67% vs. 55% to 66% in other segments) and least likely to go to a night club (20%) or sporting event (11%).
 - Free Spirits were more likely to visit towns other than the host's overnight at a hotel (50% vs. 34% to 38% in other segments), going to nightclubs or bars (32% vs. 20% to 28% in other segments), attend a special event or festival (31% vs. 25% to 29% in other segments), going to family venues (29% vs. 16% to 26% in other segments) or visit a zoo (23% vs. 10% to 16% in other segments).

5.3.3. General Activities Participated in by Visitor Type



- As with previous ways of looking at the general activities, the top activities remain the same when looking at whether visitors were friends or relatives.
- Some differences between family and friend visits are worth noting, in particular, hosts and their visiting friends or their visiting friends by themselves are more likely to do the following activities than when visitors are relatives. Specifically, when friends are involved they are more likely to:
 - Participate in outdoor activities (47% with friends vs. 38% with family);
 - Visit another town in Alberta other than the host's overnight in a hotel (38% with friends vs. 30% with family);
 - Attend special events or festivals (32% with friends vs. 23% with family);
 - Go to a nightclub or bar (30% with friends vs. 17% with family).

General Activities by Location of Host

General Activities (Guest alone or with host)	Total (%)	Location of Host					
		Calgary	Canadian Rockies**	Edmon- ton	South Alberta	Central Alberta	North Alberta
Eat at least one meal at your home	91	91	83	90	91	95	94
Eat at least one meal at a restaurant	85	86	90	90	78	83	81
Go shopping at a mall	74	77	51	80	69	68	75
Go Sightseeing	61	66	79	62	56	55	53
Visit another town in Alberta for a day trip	54	58	75	47	52	61	49
Visit a National / Provincial park	44	56	85	40	41	32	29
Participate in outdoor activities	42	42	56	35	37	48	46
Visit another town in Alberta overnight in a hotel	37	36	49	39	31	34	43
Attend a special event or festival	29	39	26	27	28	21	17
Visit a cultural venue	27	30	26	34	26	15	23
Go to a night club or bar	24	28	15	27	25	19	19
Participate in a sporting activity	23	24	27	24	23	20	24
Go to a family venue	23	26	8	26	20	13	27
Attend a sporting event	15	19	20	16	12	11	12
Visit a zoo	14	23	12	15	11	5	4

** Caution Small base size n=56

Actual Base: All respondents (n = 2027)

□ = significantly higher than other regions
□ = significantly lower than other regions

Note: bars add to more than 100% as multiple responses were allowed.

Q16. During their visit, please indicate if your out of town [friends/ relatives / mix of friends and relatives] participated in any of the following activities, and also whether you accompanied them:

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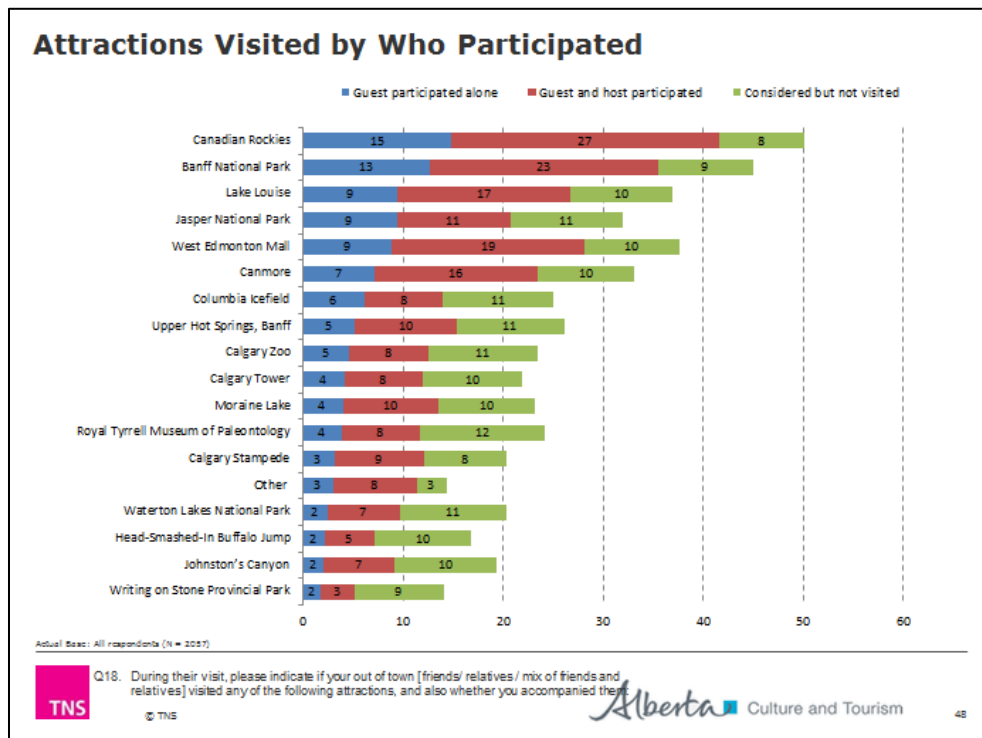
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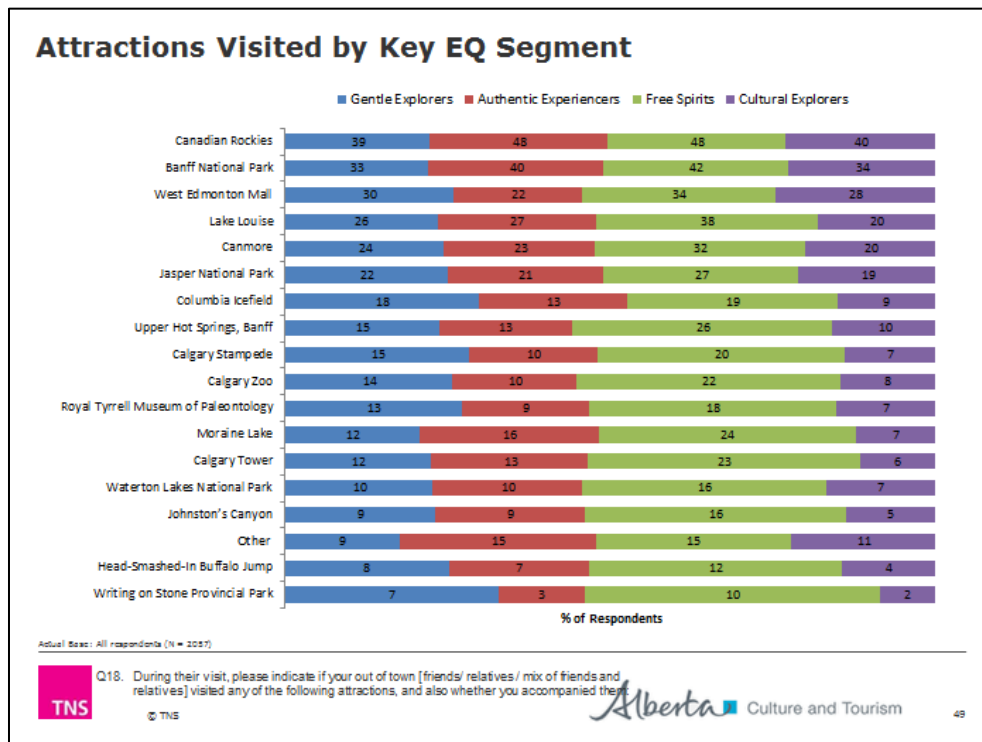
- Visitors to Calgary tend to participate in more activities generally, notably sightseeing (66%), visiting a national park (56%), attending festivals (39%) and visiting a zoo (23%).
- Not surprisingly, visitors to Edmonton were more likely to visit a mall (80%).
- Visitors to Central Alberta were well placed to day trip to another Alberta town (61%) but were less likely to visit a cultural or family venue or visit a zoo.

5.3.4. Attractions Visited by Who Participated



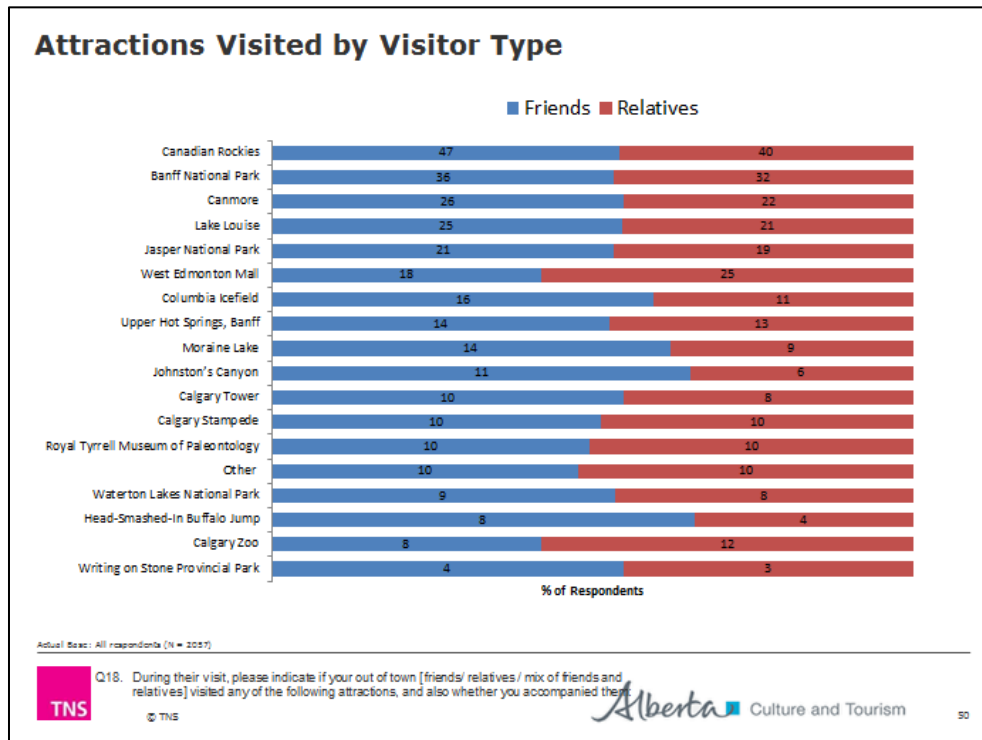
- Not surprisingly, the most common attraction visited by hosts and their guests are the Canadian Rockies (42%), Banff National Park (36%), West Edmonton Mall (28%) and Lake Louise (27%).
- Waterton Lakes National Park (9%), Johnston's Canyon (9%), Head-Smashed-In Buffalo Jump (7%) and Writing-on-Stone Provincial Park (5%) were the least visited attractions.
- Roughly 10% of guests considered but did not visit the various venues, suggesting there may be potential to capitalize on the interest expressed by guests and optimize visitation.

5.3.5. Attractions Visited by Key EQ Segment



- This chart shows the percent of attractions that hosts and visitors visited together or that visitors visited alone as a function of EQ segment.
- Overall, the most popular attractions remain essentially the same across EQ segments.
- However, some differences exist between EQ segments, most notably, that Free Spirits are more likely to visit attractions than other segments.

5.3.6. Attractions Visited by Visitor Type



- Although generally speaking the top attractions remain the same, some differences in visitation exist between family and friend groups.
 - More relatives than friends indicated they went to the West Edmonton Mall (25% vs. 18%) and the Calgary Zoo (12% vs. 8%)
 - More friends than relatives indicated they went to Moraine Lake (14% vs. 9%), Johnston's Canyon (11% vs. 6%), and Head-Smashed-In Buffalo Jump (8% vs. 4%).

Attractions Visited by Location of Host

Attractions Visited (Guest alone or with host)	Total (%)	Location of Host					
		Calgary	Canadian Rockies**	Edmon- ton	South Alberta	Central Alberta	North Alberta
Canadian Rockies	42	54	86	39	33	37	21
Banff National Park	36	55	76	31	19	27	13
West Edmonton Mall	28	14	16	62	8	25	29
Lake Louise	27	39	54	25	18	18	12
Canmore	23	39	56	18	12	15	8
Jasper National Park	21	18	51	31	10	10	23
Upper Hot Springs, Banff	15	24	27	14	10	8	7
Columbia Icefield	14	16	52	17	7	6	10
Moraine Lake	14	21	42	13	8	4	6
Calgary Zoo	13	22	15	11	9	4	5
Calgary Stampede	12	24	16	8	11	2	2
Calgary Tower	12	20	6	9	13	7	5
Royal Tyrrell Museum of Paleontology	12	18	7	10	11	8	6
Waterton Lakes National Park	10	11	7	7	27	3	3
Johnston's Canyon	9	16	17	9	4	4	1
Head-Smashed-In Buffalo Jump	7	10	3	7	13	2	1
Writing on Stone Provincial Park	5	6	4	5	11	2	1

** Caution Small base size n=56

Actual Base: All respondents (N = 2027)

□ = significantly higher than other regions



Q18. During their visit, please indicate if you out of town [friends/ relatives / mix of friends and relatives] visited any of the following attractions, and also whether you accompanied them.

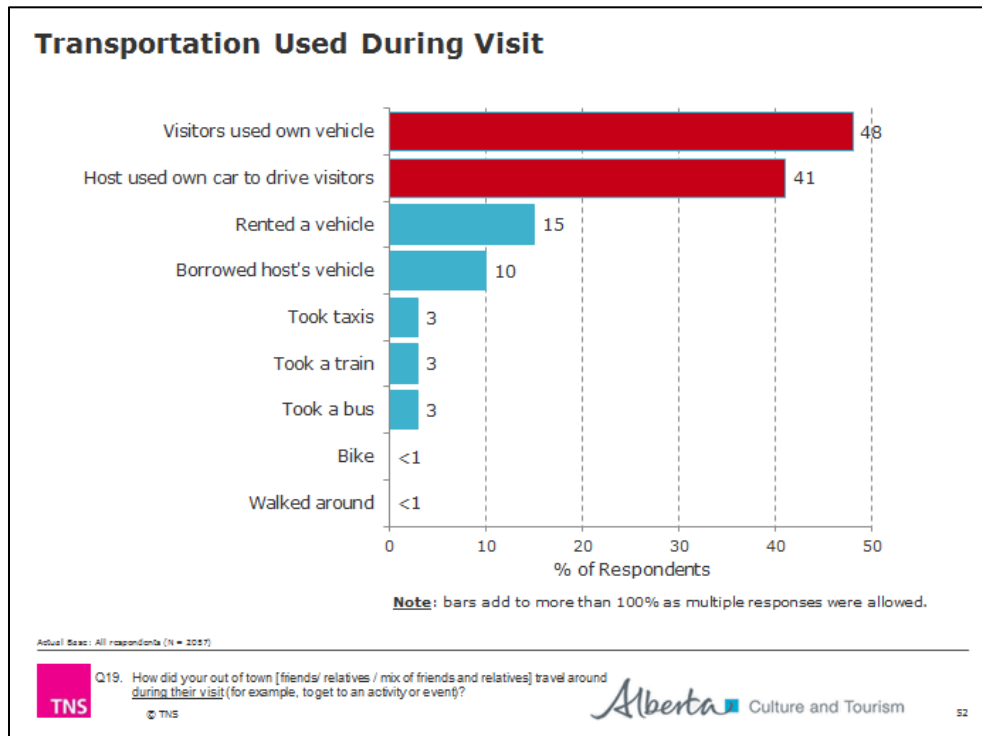
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- Visitors to Calgary visited more attractions in general. *Note:* 12 of the 17 attractions listed here are located in the southwestern part of the province which makes them closer to Calgary and Southern Alberta in general; proximity to these attractions affects the results.
- Visitors to Edmonton were more likely to visit the West Edmonton mall (62%) and Jasper National Park (31%).
- Visitors to Southern Alberta were more likely to visit Waterton Lakes National Park (27%), Head-Smashed-In Buffalo Jump (13%) and Writing-on-Stone Provincial Park (11%).

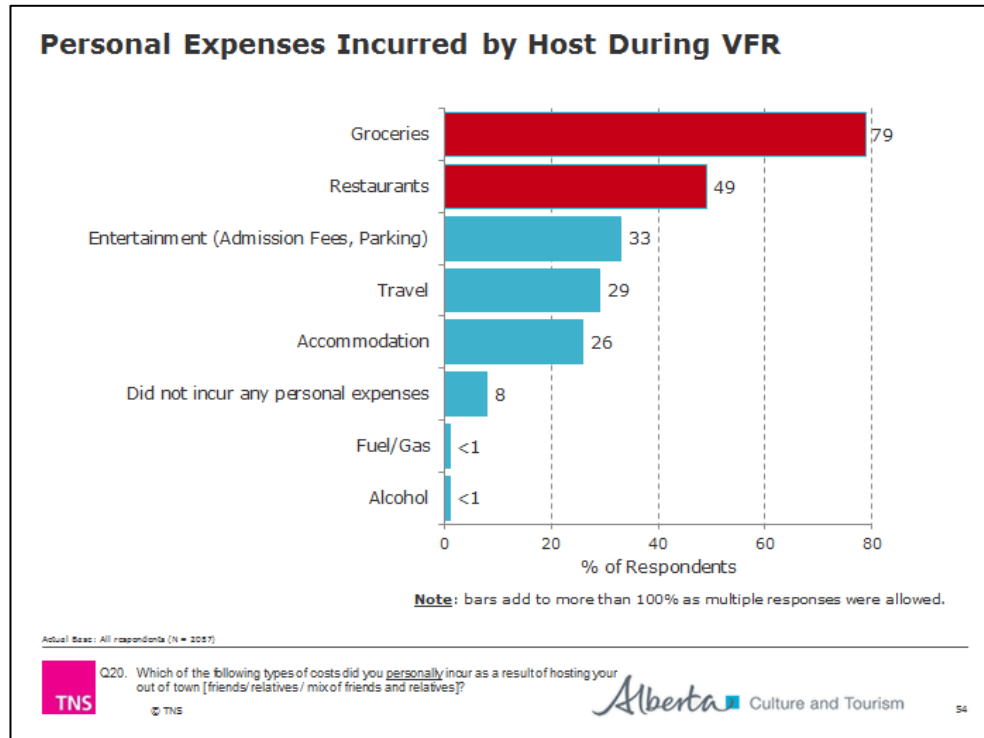
5.3.7. Transportation Used During Visit



- Most visitors used their own vehicles (48%) or hosts used their own cars (41%) to drive their visitors around while they were in town. Ten percent of hosts lent their personal vehicles to their visitors, not surprisingly, more often to family than friends.
- Fifteen percent of visitors rented a vehicle. Very few took public transportation.

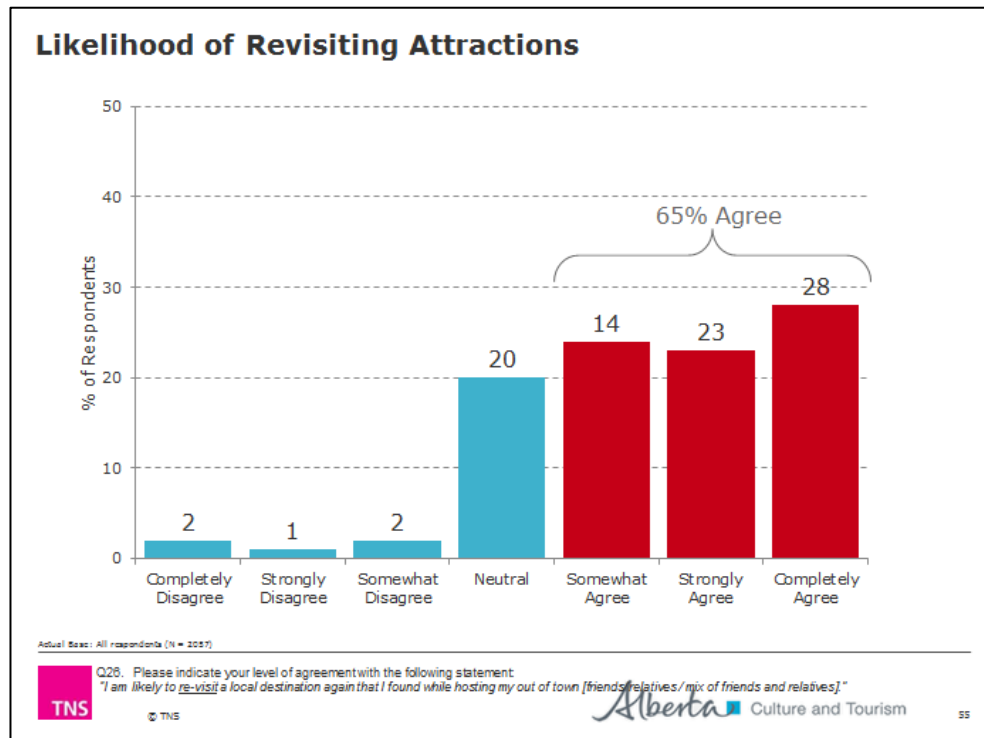
5.4. Incremental Spending

5.4.1. Personal Expenses Incurred by Host During VFR



- Hosts were asked what types of costs they personally incurred as a result of hosting their out-of-town friends and/or relatives.
 - Eleven out of 12 hosts (92%) indicated that they incurred additional personal expenses as a result of hosting their most recent visitors.
- As these are the two most frequently participated in activities, it's not surprising that most additional host spending was related to groceries (79%) and restaurants (49%) during their hosting period.
- As hosts were also attending local attractions and events, entertainment and related expenses for parking (33%) as well as travelling to and from activities (29%) and accommodations (26%) was reported.

5.4.2. Likelihood of Re-Visiting Attractions



- Hosts were asked to indicate the extent to which they agreed or disagreed with the following statement using a 7-point scale that ranged from 1, "Completely Disagree" to 7, "Completely Agree:"

"I am likely to re-visit a local destination again that I found while hosting my out-of-town [friends/ relatives/ mix of friends and relatives]."

- 65% of hosts in this study agree that they are likely to re-visit attractions they saw with their visitors during their last visit, with almost one third of hosts (28%) indicating that they are highly likely to (i.e., they completely agreed with the above statement).
- The likelihood of re-visiting attractions data suggests that hosting VFRs reminds or introduces people living in Alberta to attractions that they end up either going to themselves again or bring future visitors to; in both cases, establishing and refreshing attachments and awareness to places and activities, and increasing future revenue generation in Alberta.

6. Areas for Further Exploration

- It would be interesting to know whether hosts of different EQ segments receive visitors of the same or similar EQ segments, and if not, how their hosting behaviour changes as they find activities to suit different interests.
- Although in-depth questioning of expenditures of hosts and visitors was beyond the scope of this VFR study, a study that focusses specifically and in depth on expenditures of host and visitors would be useful.
 - The issue is conceptualising what incremental spending is defined as. Asking someone in an online panel survey about extra spending at restaurants for example is problematic, as the respondent is required to first think about how much money they would regularly spend at restaurants, and then think about the additional money spent because of hosting.
 - A more focussed, face-to-face data collection approach would be recommended.
- A specific focus on new Albertans might be worth considering too, especially those from key international target markets where there is both substantial investment and sizeable immigrant communities (possibly the UK and China, for example).
 - Integrating a VFR ambassador program with existing marketing efforts may be powerful leveraging opportunities.
- Unfortunately, new Albertans are difficult to reach via online research panels. Recently arrived residents have stronger friendship ties with distant networks, meaning that more friends come to visit in those early years after arrival. As the novelty of the new residents' community and emigration wears off, and friendship ties wane, hosting becomes more revolved around family maintenance and obligations. For destination marketers, those first couple of years after a new migrant's arrival are a chance to leverage those personal friendships that are still strong, and an opportunity to encourage newcomers to explore the region as a tourism destination themselves. Future research should strive to better understand this potentially important group of VFR hosts.

7. Summary, Conclusions & Recommendations

Summary & Conclusions

- Initially, it's important to remember that for most people hosting is an enjoyable experience; it is an activity many have positive attachments to, and is likely something that people will be receptive to. Hosting is something that many people do, and it is important in the maintenance of their relationships, and is part of their lives.
- The fact that most hosts had additional expenses, particularly around groceries and restaurants, is an interesting impact of VFR in comparison to other forms of tourism. Although we still find the typical expenses associated with tourism listed by respondents as extra costs (e.g., 49% listed restaurants, 33% entertainment, and 26% accommodations), the beneficiaries of VFR tourism activity are more likely to be outside of the traditional tourism sectors and areas, for example, grocery stores (79%). This is an important story to tell in explaining and justifying efforts to engage VFR. It is a longer term investment that benefits a more dispersed group of stakeholders including residents, local businesses, smaller destinations, and visitors, often overlooked by marketers, can help create word-of-mouth marketing and awareness.
- Given the size of this market, converting a percentage of those who considered many of the activities to visit, but who did not visit, would see a large boost in overall participation for these stakeholders. It is interesting that the number of those who considered but did not visit the different attractions is fairly consistent at around 10-12% down the list of attractions (in section 5.3.4 Attractions Visited by Who Participated), from the icons to the less well-known destinations.
- More than a third of respondents (36%) took vacation days to host their last group of visitors, with an average of 4.4 days for one hosting trip. From a balance of payments viewpoint, VFR is encouraging Albertans to keep vacation time and money in the province.
- Almost two-thirds (65%) of the most recent VFR trips were initiated in part by the host. Residents are already convincing people to travel to their communities. In addition, as we've seen, while some visitors know what they want to see and have already decided before they arrive, hosts are playing a significant role in determining what visitors are doing or are at least helping to generate the list of activities that visitors are choosing from.
- VFR hosts are involved in much of the planning of activities, and do this both before (56%) their guests arrive, and during their visitors' trip (64%). Hosts are using a variety of planning tools, however, they are still mostly depending on personal experiences and word-of-mouth from other friends and/or family. Hosting helps push tourism to smaller profile destinations. This may be because VFRs are more likely to be repeat visitors looking for new experiences. Once the iconic activities have been done, secondary places offer different and new things to do. There should be opportunities to influence activity by providing relevant and timely information on interesting and off-the-beaten-path places and events.
- Older hosts, and those who have lived in Alberta longer, are more likely to host relatives. This is consistent with other studies that see a life cycle of the types of hosting people experience. VFR visitor

groups seem to be either 1 or 2 people, or much larger groups.

- The majority (54%) of the most recent VFR trips were with relatives, a third (32%) with friends only and 14% with a mix of both, suggesting there were weddings, parties or other mixed events involved. Although the main activities were similar between friend and relative visits, visits from friends skewed toward more outdoor activities, overnight visits out of town, festivals and night clubs. Other literature suggests that groups of visiting friends tend to be more active and vacation-oriented than relatives.

Recommendations

First, ideas to help residents encourage new visits are worth considering.

- Engaging residents to be familiar and comfortable with a variety of experiences, and refresh their knowledge of current events and activities happening at specific times where they can invite people, and know that things are happening during their guests visits, will be useful.
 - Nanaimo on Vancouver Island has held a tourism week in early summer aimed at encouraging residents to become familiar with what is on offer in their region, with the aim of making them more educated and trustworthy ambassadors for the destination.
- Encouraging residents to think about specific events and activities and connect them to members of their own social networks, reminding residents of specific events and activities and prompting them to think about distant friends and relatives to visit, "Is there someone you know who would love to see the Rockies/Stampede/comedy festival, etc.? Invite them this summer!"
- Almost half (47%) of VFR visitors, who also visited for business reasons, extended their stay. Learning more about this group and their travel patterns could be an interesting approach. Somehow making residents aware of conferences happening, and making connections with their distant friends about coming to visit and extending their stay, may be a fruitful approach.
- Offer packages or personal incentives to Albertan hosts, for example, discounted groceries or photo processing, complimentary meals at a restaurant or nights at a hotel during or after the visit. This could be used to identify a database of residents who host, and to build a relationship with them on an ongoing basis both as ambassadors and as tourists themselves. Packages could be tailored to smaller or more unusual experiences that help residents feel like they're getting their guests a deal while being good hosts and provide opportunities for them to visit somewhere different while providing guests with a sense of authenticity of a local experience. This could help give residents a reason to invite people and motivate them to explore their own province. Hosts could be reminded of their trips leading up to anniversaries, prompting social media activity, and possibly offering additional ideas for itineraries or deals, etc.

Second, once visitors are in the province, what can be done to encourage more activity? Remember, they not only decide what to do before they come, many people also determine some or all of the things they will do once they have arrived.

- Occasions that bring friends and family are perhaps worth exploring. When there is a family wedding or celebration that brings people from across the country and beyond, there may be opportunities to offer the hosts some advice and guidance on providing suggested itineraries to their guests.

- Hosts need useful and timely information easily available. Although they consult many sources of information, respondents rated their own experiences as the most useful.
- Perhaps also having information that speaks to hosts, e.g., “Have guests coming this week? Here’s what you could do!” might be useful for people looking for interesting experiences.
- With more than a third of respondents taking more than 4 days off on their last hosting trip, it may be possible to encourage hosts to participate in regional travel, encouraging more people to take more time to visit other Alberta destinations with their guests. This might be a useful indicator for measuring success in future campaigns.

Finally, what can be done to encourage more activity post-visit, repeat visitation by VFR visitors, and residents to visit other places that they’ve been to with their guests?

- If a VFR campaign included some type of sign-up and registration, residents could be engaged in the future with relevant prompts related to their hosting activities.
 - Being reminded of hosting as well may promote feelings of nostalgia and produce material worth sharing. Consider, for example, prompts such as “Remember this time last year when you took your friends to the Rockies? Take someone else this year and receive a discount.”
 - Hosting does help put these places in the mind of the host as possible places to visit and conversion should be a goal, but it’s worth remembering that hosting can also be a tool for reminding residents of all the great things they have to do in their province for themselves on future trips.

8. Questionnaire



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