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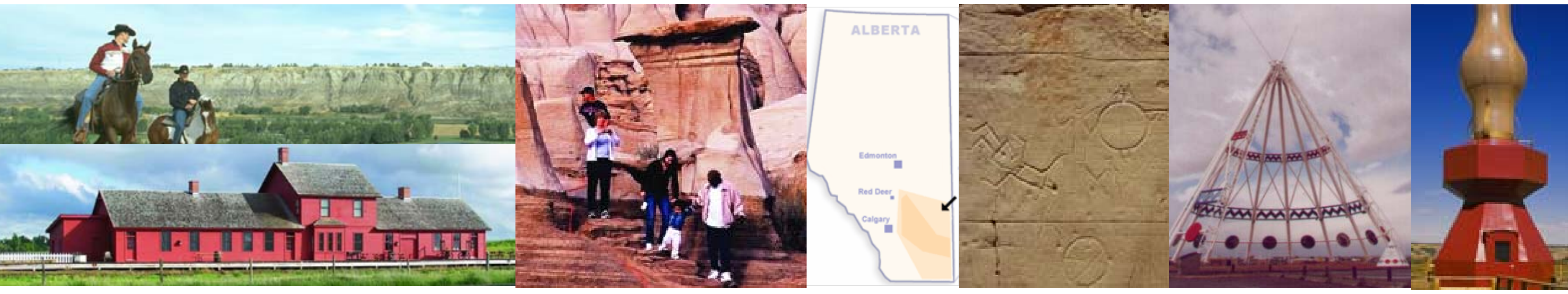
Report

Alberta Tourism, Parks, Recreation and Culture

January 18, 2008



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Executive Summary

Introduction

This study was an investigation of western Canadian market potential for the Canadian Badlands, a recently defined tourism region in southeast Alberta. Its intent was to provide a comprehensive understanding of current travel patterns and preferences, knowledge and perceptions of the region and interest in the experiences, attractions and activities it has to offer. Current and potential market size was estimated.

Study results are based on 1403 online interviews conducted in November/December 2007, with 200 completed in each of the following metropolitan areas: Vancouver, Kamloops/ Kelowna combined, Edmonton, Calgary, Saskatoon, Regina and Winnipeg. All markets were given equal weight in the data analysis.

The target market was further defined as including two demographic groups: Young Families (household heads aged 25 to 49 with at least one child in the household under the age of 18) and Mature Families/Singles (household heads aged 50 to 69 with or without children in the household). These groups were weighted to their true proportions in each location, resulting in an overall split of 43% Young Families and 57% Mature Families/Singles.

According to the 2001 census, the target market included almost one million households and made up 50% of all households in the areas surveyed. Among these households, 75% qualified for the survey by having traveled in Canada or the US on at least one pleasure or vacation trip lasting one or more nights in the past three years.

The questionnaire was built on the findings of a preliminary qualitative stage that included twelve focus group conducted in six of the cities. This stage was reported separately and also addressed some topics and materials not covered in the survey.

General vacation and pleasure travel behavior

92% of the market had taken a vacation or pleasure trip in Canada in the past three years lasting one or more nights. 52% had visited the US and 25% had visited other countries. The most popular western Canadian destinations (86%) were British Columbia and Alberta (53% each).

Place of residence strongly influenced destination choice due to proximity, but other preferences also played a role. Five general destination clusters were identified and profiled:

- *BC Centric* (30%) visited BC and relatively few other destinations. They were the largest cluster in Kamloops/Kelowna (53%) and Calgary (40%) in particular and to a lesser degree in Edmonton (31%);

- *Sun and Warmth* (21%) much preferred US destinations, especially the US Pacific region including California, Washington and Hawaii, as well as Florida. They were the least likely to visit Alberta. This was the largest cluster in Vancouver (49%) and included many Kamloops/Kelowna (28%), Calgary (28%) and Edmonton (20%) residents;
- The *North Central* (21%) cluster mainly visited destinations in Central Canada, Manitoba and the US West North Central, especially Minnesota. They dominated in Winnipeg (59%) and were strongly represented in Saskatchewan, especially Regina (31%);
- *Prairie Hearts* (15%) concentrated their travel in Alberta and Saskatchewan and were the largest cluster in Saskatoon (36%) and Regina (25%) and well represented in Edmonton (21%);
- *Peripatetic* (13%) travelers had very high levels of visiting all locations in Canada, the US and other countries and were found in all markets, though less in BC. Alberta was as frequently mentioned as a destination as among Prairie Hearts, but the competition is the whole world.

Visitors to Alberta in the past three years were found most often in Regina, Saskatoon and Edmonton (72%, 68% and 61% respectively). They were least likely to be from Vancouver (27%), followed by Winnipeg (40%) and about average in Kamloops/Kelowna (47%) and Calgary (52%). On average, they had taken 4.8 trips to the Province, more if they lived in Edmonton and Calgary, less elsewhere. The median was 3.

Calgary and Area was the most frequently mentioned Tourism Destination Region (52%), Alberta North the least (14%). 36% had visited Alberta South at least once in this timeframe, especially Calgarians (58%) and Peripatetics (48%) and not Prairie Hearts (23%).

Seasonality was more pronounced for Alberta than for all destinations in general. The most popular month for visiting was July (45% had visited at least once), followed by August (38%). June and September were strong shoulder months (24%). A fairly similar proportion visited in each of the remaining months (12% to 18%) with the low occurring in January.

The most frequent trip length taken within western Canada was 3 to 7 days (43%), followed by weekend trips (36%), though many people took longer trips on an occasional basis.

In terms of travel party composition, 44% of the market traveled most often in western Canada with children and 56% in adult-only parties. Young Families traveled most often as a couple with children (50%) or one parent with children (19%). Mature Families/Singles traveled most often as a couple (49%) or alone (22%). However, at some point in the past three years, 30% of the market had traveled with adult friends and 24% with adult relatives (both without children), 21% as an extended family with children and relatives and 18% with friends and children, so there is considerable diversity on an occasional basis.

Overall, the most popular types of accommodation in western Canada were the homes of friends and relatives (34%), moderately priced hotels/motels (24%) and campgrounds (tent or RV 12%). Many other types of accommodation were used on an occasional basis and use differed in important ways by income, lifestage, traveler segment and city of residence.

By far the most popular source of information about western Canadian destinations was the Internet, used most frequently by 33% and in total by 69%. Advice from friends and family (23%/51%), their own past experience (20%/47%), and travel/auto associations (10%/17%) were the next most popular individual sources. Supplementary sources included information at the destination from visitor information centers and local tourism properties, and ahead of time from tourism destination bureaus.

Perceptions of the Canadian Badlands

Awareness, opinions and experience

In total, 82% thought they had heard of the Canadian Badlands, though the majority had only some or a little knowledge of it (58%) and very few claimed to "know a lot" about it (7%). Familiarity was highest in Calgary and Edmonton.

62% had a positive overall impression of the Canadian Badlands, with the modal response being "somewhat favorable" (42%). Very few had unfavorable perceptions (5%), so the balance was either neutral (24%) or there was no impression at all (11%) among those who felt they had heard of it.

Western Canadian visitor flows through and in the Canadian Badlands in the past five years

Respondents were next shown a detailed map of the region and 48% indicated they had visited in the past five years. 26% had visited over five years ago, while 24% had never been there. Average time since the last visit was 7 years, with Calgary residents being the most recent visitors (4 years), followed by Saskatoon and Regina (5 years). Vancouver residents were the least likely to have visited at all (46% had not) and those who did, did so longest ago (11 years).

Based on "hot spot" clicks made on the map, Drumheller was identified as the place visited by the highest proportion of regional visitors in the past five years (54%). The next most frequently seen areas were Highway 1 and its gateway cities, Medicine Hat and Calgary (38%-40%) – see map.

Five travel patterns in the Canadian Badlands were identified through cluster analysis.

- 30% of visitors have barely *Scratched the Surface* of the region, having seen only 3 places on average (most often Drumheller, Calgary, Medicine Hat, Highway 1 and/or Highway 2). They were light travellers in general, made fewer than average trips to Alberta and felt they knew little about the region. Many were more interested in city destinations or were Young Families who may limit the distances traveled and the number stops they make;
- 26% were *Southern Visitors* who were more likely to have visited Medicine Hat and Highways 1 and 3. Very few had been to Drumheller or any of the smaller towns in the north of the region. Most lived east of the province in Regina (37%), Winnipeg (17%) and Saskatoon (13%). They too had relatively low familiarity with the region. They were the least likely to have visited Alberta at all in the past three years and when they did, Calgary and Area was the destination at an above average rate, suggesting that many were simply driving through;
- 20% were termed *Just Drumheller* as most other destinations and roads were visited at below average rates. They rarely visited the south of the region or even other locations closer to Drumheller. Many were from Saskatoon (33%) and an above average number were Albertans (44%). They were very likely to visit Alberta and do so frequently, claimed high familiarity with the Canadian Badlands but only average favourability;
- 13% were *Regional Explorers*, distinguished by very high rates of visiting Drumheller and well above average rates for all the provincial parks in the region, along with many towns both in the north and the south. They particularly favored rural destinations, tended to be older (more Mature Families/Singles) and were both more familiar and more favourably inclined to the region than other clusters;
- 11% were classified in the *Been There* cluster due to the very large number of highways and places they marked on the map. They were more concerned with routes, while Regional Explorers were more focused on destinations. They had high rates of use of almost all roads, north-south and east-west, as well as above average visits to many towns, both in the south and north. They were overrepresented among Mature Families/Singles, were frequent travellers to Alberta, favored Alberta South and were more familiar and favourable than average in their knowledge of and attitudes to the Canadian Badlands.

Impressions of the Canadian Badlands

Using a five-point scale, respondents rated the degree to which they agreed with twenty-two statements that visitors have used to describe the region. Factor analysis revealed that these perceptions include three underlying image components:

- One component identified the *distinctive features* of the region. These included (in order of level of agreement):

- Has unusual natural features and landscapes (average rating 4.28 with 41% strongly agreeing)
- The best place in the world to go for dinosaurs (4.23 with 40% strongly agreeing)
- Has beautiful scenery (4.12)
- A place where you learn (4.08)
- Offers unusual and rare attractions, activities and experiences (3.97)
- Fun for children (3.92)
- Offers western experiences and pioneer history (3.82)
- People are friendly (3.78)

By far the strongest agreement was found for the first two statements, identifying them as *the* two key features of the region. Most of the other statements in this component elaborate on the two key features (e.g., resulting from the unusual landscapes and dinosaurs, it is a place to learn, there are unusual and rare things to see and do, it is fun for children, it has beautiful scenery).

The remaining items, which are linked – western experiences/pioneer history and friendliness of local residents – were less important, but also describe a distinctive facet of the Canadian Badlands.

- Another component described the *activities and services* available in the region. These centered on the amount and variety of activities and the quality of hospitality services available and paint a picture of the types of things adults find interesting. As the scores were generally lower, they are supporting features rather than the main event:
  - There are lots of interesting places to visit (3.90)
  - Includes interesting small towns and cities (3.80)
  - Fun for adults (3.77)
  - You can see lots of wildlife and birds (3.74)
  - There are lots of opportunities for relaxation (3.69)
  - The weather is great for visiting (3.62)
  - Offers opportunities to learn about Aboriginal culture (3.60)
  - There are good hospitality services (e.g., accommodation, food) (3.59)
  - There are lots of different recreational activities you can do (3.59)
  - A comfortable, familiar place for you (3.35)
  - Rich in the arts – theatre, music festivals, painting, pottery and more (3.29)
  - There is enough for you to do at night (3.24)
- The final component included statements about the experience of driving through the region. The factor loadings were negative, indicating greater disagreement with the sentiments expressed:
  - Boring to drive through (2.91)
  - The distance between attractions is too great (2.50)

People who had never visited the region had less positive impressions of all aspects, but especially the two key defining features. Many parents of pre-school children – the next generation of visitors – lacked knowledge about the region, answering "don't know" more than any other lifestage.

INTEREST IN WHAT THE CANADIAN BADLANDS HAS TO OFFER

To investigate the potential drawing power of the region's signature attractions, pictures of eight attractions and four activities were shown and rated according to the influence they would have on visits to the Canadian Badlands and the economic impact these visits would have on Alberta and the region. The options included: go specifically to the region to see the attraction, extend a trip in or through Alberta to visit, visit but not change the trip length in Alberta, not visit as the attraction is of no interest. The results showed that:

- The strongest attractions were the Royal Tyrrell Museum and Dinosaur Provincial Park where the single largest response was that they would make a special visit to see these attractions (45% and 39% respectively). The majority of the market would spend additional funds in Alberta and the Canadian Badlands to make a special visit or extend a trip (66% and 62% respectively);
- Writing-On-Stone Provincial Park proved to be the next strongest draw, with a similar proportion (61%) likely to have an incremental economic impact. However, fewer would make a special visit (31%);
- Cypress Hills Interprovincial Park and its recreational opportunities ranked next highest in drawing power with 49% indicating an incremental economic impact, though for the largest proportion (37%) the visit would be substitutive;
- Alberta Prairie Railway Excursions was the final attraction to show substantial pulling power at 40% who would make a special trip or extend a trip;
- The historic Atlas Coal Mine Historic Site and Blackfoot Crossing Historic Site drew in the 25% to 30% range, with half the respondents willing to visit if they were in the area.
- Horseback riding/western experiences (26% incremental economic impact), golfing (24%) and water recreation (23%) were the activities tested. These tended to be either of interest, or not, as they registered high "would not go there" responses (43%, 56%, 41% respectively);
- The arts-based attractions of Rosebud Theatre (21% incremental economic impact) and Medalta Potteries and Clay Works Historic District (13%) were the least likely to draw people to the region, but like the historic sites would be visited once there (both 43%). There were also many who found them of no interest at all (37% and 44% respectively).

In summary, it was primarily the natural attractions – which correspond to the distinctive features component – that appeared to have the ability to draw a substantial portion of the market to the area or to entice them to stay longer. The remaining attractions help to round out the experience but are not sufficiently strong to lead the appeal.

One of the more important findings was that the Canadian Badlands offers the potential to retain tourism dollars within the province, especially from the 40% of Calgary residents who were BC Centric.

To see these and other attractions, 20% of the market would take a multi-day escorted motor coach tour starting in a city in Alberta, 27% would take a one day or half day escorted bus tour starting in the Canadian Badlands and 33% would take a guided walk with an interpreter.

Respondents also indicated which of thirty-eight activities they would be interested in experiencing in the Canadian Badlands. These activities are currently or could be offered in the region. Over 50% indicated interest in experiences that mostly belong in the distinctive features component, cementing the importance of their appeal:

- Natural wonders and panoramic views (e.g., unusual rock formations, geological layers, canyons/coulees, hoodoos) (69%)
- Historic sites, palaeontological/archaeological sites (e.g., coal mine, ghost town, authentic pioneer village, dinosaur dig) (65%)
- Museums or exhibits (e.g., dinosaur museum, heritage museum, NWMP, industrial heritage museums) (64%)
- Peace and quiet (64%)
- Lovely scenery (e.g., green rolling hills, lakes, river valleys, prairie) (64%)
- Historic architecture/buildings, forms of transportation (e.g., railway station, steam train, ferry, churches, suspension/trestle bridges) (50%)

Six experience clusters were identified from the responses provided. These corresponded strongly to other travel interests expressed throughout the survey and are profiled in some detail below since they offer opportunities for defining target audiences and/or shaping messages.

- The *History and Nature* cluster (30%) were especially interested in history-related experiences (historic/palaeontological/archaeological sites, museums/exhibits and historic architecture/buildings/transportation), in nature (natural wonders/panoramic views, lovely scenery, wildlife/birds, wildflowers/flora) and more likely to express an interest in hiking/backpacking and stargazing/eclipse viewing/star parties, photography and peace and quiet. They had an above average interest in taking guided walks with an interpreter and also had an above average interest in cultural or arts-related activities (aboriginal experiences, fine arts and crafts).

They were less interested in modern built facilities and amenities (casino, resort, movies/cinema, health/wellness spa), were less physically active and more risk averse (ATVs/quadding, water-based activities, motorcycling).

Consistent with the above, they proved to be more interested than many of the other clusters in natural attractions (Writing-on-Stone Provincial Park, Cypress Hills Interprovincial Park), historic attractions (Atlas Coal Mine Historic Site, Blackfoot Crossing Historic Park) and cultural attractions (Rosebud Theatre, Medalta Potteries and Clay Works Historic District).

Two-thirds were Mature Families/Singles, generally empty nesters and older groups, traveling most frequently as a couple, by themselves with adult friends, or occasionally alone. They favored camping (tent or RV) as the most frequent form of accommodation. They traveled at a slightly above average rate throughout Canada and were somewhat overrepresented in the BC Centric and Peripatetic destination clusters and underrepresented among Urban Explorers, since they had a strong interest in tranquil rural destinations.

They had made relatively few trips to Alberta in the past three years, and were somewhat less likely to travel in Alberta October through March.

Many had visited the Canadian Badlands in the past five years and very few had never been there. However, despite being the most familiar of all with the region and having the most favorable overall opinion of it, their last trip was not more recent than average.

- People interested in a *High Life Escape* (20%) had below average interest in what the Canadian Badlands can offer, except for golf, shopping and enjoying peace and quiet. They would use a casino, resort and health/wellness spa in the region. The core distinctive features of the region were of below average interest, along with guided walks, hiking, cycling and campgrounds.

  Among the signature attractions and activities, High Life Escape members were more interested in the activities, especially water recreation and golf, to some degree horseback riding, and also in visiting Cypress Hills Interprovincial Park (presumably because recreational opportunities were shown and described). They agreed at an above average rate that the distance between attractions in the Canadian Badlands is too great and that it is boring to drive through.

  Members of this cluster were less well educated and less likely to be Accomplishers. They preferred familiar destinations and were less interested in seeing new places, staying at privately owned cottages/cabins more often than most. They were most likely to belong to the Sun and Warmth destination cluster.

  High Life Escape members were average in their familiarity with and opinions of the Canadian Badlands. The time since their last visit to the Canadian Badlands was slightly longer than average and a below average proportion had visited Drumheller. Many belonged to the Scratched the Surface travel cluster and they were underrepresented among Regional Explorers.

- *Up for Anything* (18%) cluster members were enthused about most of the experiences presented, offering the highest scores on most items – natural, historical and arts related – along with very high scores on many physical activities. They were particularly distinctive for their very strong interest in the creative arts (fine arts and crafts/galleries/studios/exhibitions, indoor or outdoor performing arts, local festivals and events, local foods/ingredients/recipes) and were the group most likely to be interested in a photo safari/fine arts camp/workshop.

  They also had the highest level of interest in most signature attractions and activities, with scores for the arts and culture items that were especially strong (Blackfoot Crossing Historic Park, Rosebud Theatre and Medalta Potteries and Clay Works Historic District), along with the Alberta Prairie Railway. They had the highest interest in a multi-day motorcoach tour, a same day bus tour and in guided walks with an interpreter.

  This cluster had only average familiarity with the Canadian Badlands but held a strongly positive opinion of it, especially on having enough to do at night, opportunities to learn about aboriginal culture, the richness of the arts scene, opportunities for relaxation and to enjoy western experiences. They were the only group to be above average in scoring the region as fun for both children and adults.

  They were predominantly female with a below average household income and underrepresented among Real Relaxers, since challenging themselves rather than relaxing was important when on a leisure trip.

  They were overrepresented in the BC Centric and North Central clusters and made above average use of the Internet as an information source, were more likely than others to use travel associations as an ancillary source and to follow road signs/billboards.

  They had made the most recent trips to the region, were slightly overrepresented in the Southern Visitors and Regional Explorer groups and underrepresented among those who have Been There.

- The *Fossil Focused* (17%) cluster was primarily interested in dinosaurs and at or below average on all experiences other than historic/palaeontological/archaeological sites and museums/exhibits.

  They were less interested in attractions other than the Royal Tyrrell Museum and Dinosaur Provincial Park, where they were average, suggesting that while this was the only theme that was of interest to them, it was not an overly compelling one. Their likelihood of taking part in activities like horseback riding, golf and water recreation or visiting Cypress Hills Interprovincial Park was especially low.

  Fossil Focused claimed high familiarity with the Canadian Badlands, but only average favorability. Specific perceptions showed a greater likelihood of seeing the region as the best place in the world to go for dinosaurs, as a place where you learn and one that offers unusual and rare attractions. While they did agree that the region has unusual natural features and landscapes, they were also more likely to say it is boring to drive through.

The cluster included a high proportion of males, a somewhat higher proportion of people aged 55-64 who still had adult children living at home (i.e., grown families) and an above average concentration of Saskatoon and Winnipeg residents.

They were especially interested in seeing new places and did not value peace and quiet on a vacation or leisure trip. They had visited Alberta less often than average in the past three years but had last been to the Canadian Badlands at an average rate. Not surprisingly, this cluster was strongly linked to the Just Drumheller travel cluster.

- *Outdoor enthusiasts* (11%) distinguished themselves by the high rate of selection of all outdoor activities (hiking/backpacking, water-based activities, horseback riding, ATV/quadding, cycling/mountain biking, winter activities and golfing), an above average interest in rustic accommodation (a guest ranch, a campground/RV park, cottage/cabin) and in other outdoor amusements (hot air balloon/helicopter ride, theme/amusement park).[1]

  Their interest in the signature activities stood out (horseback riding, water recreation and golfing, Cypress Hills Interprovincial Park). They were also very interested in Writing-on-Stone Provincial Park, the Alberta Prairie Railway and Atlas Coal Mine Historic Site. They had above average interest in a multi-day motorcoach tour, a same day bus tour and in guided walks with an interpreter.

  Outdoor Enthusiasts had average familiarity with the region and a strongly positive overall image of it. However, despite their enthusiasm, they did not have a distinctive image of the region and had a slight propensity to see the drive as boring and having long distances between attractions.

  Overwhelmingly made up of Young Families and including a high proportion of males, most had children under 18 living at home, especially pre-school and school-age families (up to 12 years). This explains the strong interest in man-made attractions side by side with physical activities.

  Outdoor Enthusiasts had the highest household income of all clusters and included the highest proportion of Accomplishers and the lowest of Urban Explorers. They were more interested in rural than urban destinations, look for excitement and like to challenge themselves on a trip.

  Their travel parties generally included children, usually the nuclear family, occasionally with other relatives. They were notable for taking weekend trips most often, with occasional one to two week trips, traveling from October through March as well as in July and favoring both luxury hotels and tents at an above average rate. They were especially likely to use the Internet as a source of information.

1. Note: Outdoor Enthusiasts were interested at an average rate in the distinctive features of the region; it is the activities that set them apart that are described above.

Outdoor Enthusiasts were overrepresented in traveling in Canada and western Canada, with Alberta as a major destination, making the largest number of trips to or in Alberta of any of the clusters. They had the shortest average time since their last trip to the Canadian Badlands and were overrepresented in both of the most widely traveled Canadian Badlands clusters (Been There, Regional Explorers).

- The *Not for Me* cluster (11%) found little to interest them in the Canadian Badlands by way of activities and attractions, while expressing the strongest agreement that the region is boring to drive through and that distances between attractions are too great. Part of the reason for their very poor impression of the region may be the fact that they also had lower familiarity with it.

  The cluster included a high proportion of males, Vancouver and Winnipeg residents and a low proportion of Edmontonians. Accomplishers were underrepresented as the Not for Me cluster like to relax at familiar destinations rather than see new places. They behave consistently with that value (lower visitation to western Canadian destinations, particularly Saskatchewan and Alberta, more often in the BC Centric cluster and less Peripatetic).

  Those who had visited Alberta were much less likely to have visited Alberta South. Half had never visited the Canadian Badlands and if they had, they had not been there for 10 years on average, the longest of any cluster.

Market potential

Currently, approximately 10% of the market visits the Canadian Badlands each year. Market potential to visit the Canadian Badlands over the next three years was assessed for the same economic impact scenarios used to determine the drawing power of the region's signature attractions. The results showed that:

- 38% would visit the Canadian Badlands in the next three years, making a special trip to the region to do so. This was a 19% gain on the baseline measure of interest (32%), taken before exposure to information in the survey other than the map. It reflects the impact of enriched information that could be conveyed by effective marketing and education efforts;
- 35% would extend a trip in or through Alberta to visit the region, a 16% gain over the 30% pre-exposure baseline measure;
- 36% would visit the region but not change the length of their trip in Alberta. At 38%, this represents the largest gain over the baseline measure (26%);
- On an overall basis, the best estimate of market size over three years is 36%, for an average 24% gain as a result of having more information (baseline 29%).

The strongest likelihood is that a special trip will made, which has potentially the greatest economic impact for both the province and the region. The strongest gain, however, was for a substitutive stay in the region rather than elsewhere in Alberta.

Markets with a high chance of visiting in the future included:

- Edmonton, Calgary and Regina residents;
- Young Families rather than Mature Families/Singles, including children of all ages, from pre-school to teen, with parents aged 25-34 or 35-44 years;
- Accomplishers, due to a strong interest in visiting unfamiliar new places, more often rural destinations and in wishing to challenge themselves;
- People who are Up for Anything, Outdoor Enthusiasts and those interested in History and Nature in the Canadian Badlands;
- Regional Explorers and the Been There travel clusters.

The travel patterns of high potential visitors are profiled in further detail in the report. The results show that large future market growth is unlikely to be achieved by fulfilling unmet demand from new regional markets, but rather by bringing back previous visitors with a positive impression of the region to explore and experience more of what it has to offer.

Table of Contents

Introduction

Alberta Tourism, Parks, Recreation and Culture (TPRC) has been actively pursuing a vision of developing a major new destination in Alberta to complement what is offered by the Canadian Rockies. Work on the concept started six years ago, spearheaded by the Town of Drumheller, Travel Alberta In-Province and Alberta Economic Development (now TPRC) with a vision for the destination being developed in 2001 as, "*A quality, year-round, branded, international, national and local tourism destination for all ages – a new Alberta destination icon*."

A considerable amount of work has been done since 2003 relating to identification and delineation of the region, naming and branding of the Canadian Badlands, building partnerships with many of the communities located in it and investigating opportunities to enhance the tourism experience. In 2004 a Marketing Committee was struck and prepared a marketing strategy. In 2006 this grew into Canadian Badlands Ltd., which has municipal membership.

Provincial government support for the Canadian Badlands continues, and the region is included in the Ministry's *Business Plan 2007-2010* under the heading *Significant Opportunities and Challenges*, as follows:

> "Alberta is a world-class tourism destination attracting visitors from across Canada and beyond. Rising demand for tourism experiences including Aboriginal, agri- and eco-tourism creates diverse opportunities for the province. Rural areas in the province, such as the Canadian Badlands, continue to develop as new tourism destinations and are becoming increasingly appealing to visitors from around the world."

More specifically, Goal 3, Strategy 3.4 is to, "Support the expansion of the tourism industry through development of new and enhanced destinations and products particularly in rural areas (including the Canadian Badlands, Tracking Alberta Dinosaurs, heritage tourism, experience-based tourism, sport tourism, learning/enrichment tourism, Aboriginal tourism and film tourism)."

The present study begins to address the marketing side of the equation. Exploratory qualitative research was conducted in September/October 2007 (*A study of western Canadian market potential to visit the Canadian Badlands: Exploratory qualitative research*, November 2007). The findings formed the basis for the current quantitative study. This was conducted to identify and understand segments in the western Canadian market that will be attracted to the new region and will provide economic benefits to it and the province.

The region extends across a swath of the SE corner of Alberta, east of Highway 2 and south of Stettler, extending to the Saskatchewan and Montana borders.

Canadian Badlands Region

Current marketing addresses four primary themes – Natural History (geological, palaeontological, archaeological), Industrial/Historical (rail history, mining, oil, clay, aboriginal influence), Western Lives (ranching and farming history, rural communities) and Arts, Culture and Recreation. These themes allow equal weight to be given to promoting all parts of the region. The Canadian Badlands website was launched in mid-2007 and a dozen touring routes are available. Six new routes are being prepared.

Purpose and objectives

The primary purpose of the research is to provide an in-depth and comprehensive understanding of Canadian regional market travelers who might visit the Canadian Badlands.

An important focus is on understanding the travel patterns and behaviors of Travel Alberta In-Province's four traveler segments as they relate to this destination, in addition to the target geographic market and two demographic market groups, Young Families and Mature Families/Singles.

The objectives of the study are to investigate:

1. Leisure/vacation trip behavior and rationale.
2. Vacation planning.
3. Travel patterns in western Canada.
4. Perceptions of the Canadian Badlands.
5. Reactions to attractions/experiences and tours/touring routes[2] in the Canadian Badlands.
6. Experiences of past Canadian Badlands visitors.

In order to make use of the information, recommendations on target segment/s, media and messages have been requested and are presented under separate cover.

Methodology

GEOGRAPHIC, DEMOGRAPHIC AND TRAVELER SEGMENTS

The market covered by the quantitative research was defined **geographically** as including residents of the metropolitan areas of Vancouver, Kamloops/Kelowna, Edmonton, Calgary, Saskatoon, Regina and Winnipeg. Kamloops and Kelowna, being very small markets, were combined for sampling and analysis.

2. The qualitative research included a thorough review of touring routes and should be referenced for information on interest in use, potential to influence visitation and opportunities for improvement. Due to questionnaire length, this topic was not addressed quantitatively.

Two **demographic market groups** were targeted:

- *Young Families*: Household heads aged 25 to 49 with at least one child in the household under the age of 18.
- *Mature Families/Singles*: Household heads aged 50 to 69 with or without children in the household.

Approximately 992,000 households are included in these markets, based on Census 2001 data. The two demographic market groups make up 50% of all households in these cities, as shown below.

	Number of Households (000)	Proportion of total households %
Vancouver	369	49
Kamloops/Kelowna	50	52
Edmonton	182	51
Calgary	178	50
Saskatoon	43	49
Regina	38	50
Winnipeg	132	49
Total	**992**	**50**

Four **traveler segments** were of interest: Accomplishers, Urban Explorers, Comfort Seekers and Real Relaxers. Participants were not recruited by segment, but answered short form classification questions during the interview. The segments are described and their distribution is shown and discussed in Appendix II.

Based on the findings from the survey itself, three further sets of clusters were identified. These are discussed in the report itself.

SAMPLE SIZE AND DISTRIBUTION

The survey was administered online. Three online panels were used to assemble a sample of sufficient size to permit online surveying in the smaller markets. The lead organization was OpenVenue eResearch Solutions' Web Perspectives Canadian Consumer Panel, supplemented by Global Market Insite and IPSOS Canada panelists.

Online panels are representative of the online population. According to Statistics Canada, the online population constitutes a majority of the population. In Calgary it includes 77% of adults, Vancouver 71%, Winnipeg 70%, Edmonton 69% and 68% in "other urban areas" in Canada.

90% of users access the Internet from home, with two-thirds doing so daily, so most are regular users. 63% of Internet users search for travel services such as hotel reservations and car rentals, and just over one-third (36%) of all Internet shoppers (who make up 41% of the online population) placed an order for such services. People over 45 years of age were more likely to purchase travel services this way. (*Canadian Internet Use Survey, 2005*)

200 interviews were conducted in each geographic market (100 each in Kamloops and Kelowna). Within each market, an approximately equal balance of respondents by demographic market group and gender was targeted, to ensure a sample base of sufficient size to examine each segment with some degree of confidence. However, the main objective was to generate the totals required for the smaller geographic markets. All participants had taken a discretionary pleasure or vacation trip in Canada or the US in the previous 3 years.

The survey was soft-launched on November 21, 2007 after which the questionnaire length was reduced. The main survey was conducted between November 26 and December 6, 2007, providing a total of 1403 responses by the cut-off. Appendix I outlines the number of responses received in more detail.

The results were weighted to restore true population proportions by demographic market group and gender within each geographic market, so that the findings would be representative of the target population. To ensure that each geographic area was given equal importance in the combined findings, the cities were not weighted proportionately relative to one another. The weighted sample is also shown in Appendix I.

QUESTIONNAIRE AND DATA ANALYSIS

Following completion of the qualitative research, a draft question list was prepared and approved. The questionnaire was soft-launched (pilot-tested) before the main launch. Final median survey time was 15.5 minutes. The questionnaire is included as Appendix II.

It should be noted that due to a significant change in format of one question following the soft-launch (month/s in which different destinations were visited) the sample base is reduced by about 50 for that question.

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

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

Summary of Findings

Vacation and pleasure travel behavior

TRIP DESTINATIONS

Most popular destinations

By definition, all survey participants had to have traveled for pleasure in Canada or the US on at least one trip lasting one or more nights in the previous three years.

Virtually everyone had been to a destination in Canada (92%), about half had visited the US (52%) and one-quarter had been elsewhere in the world (25%).

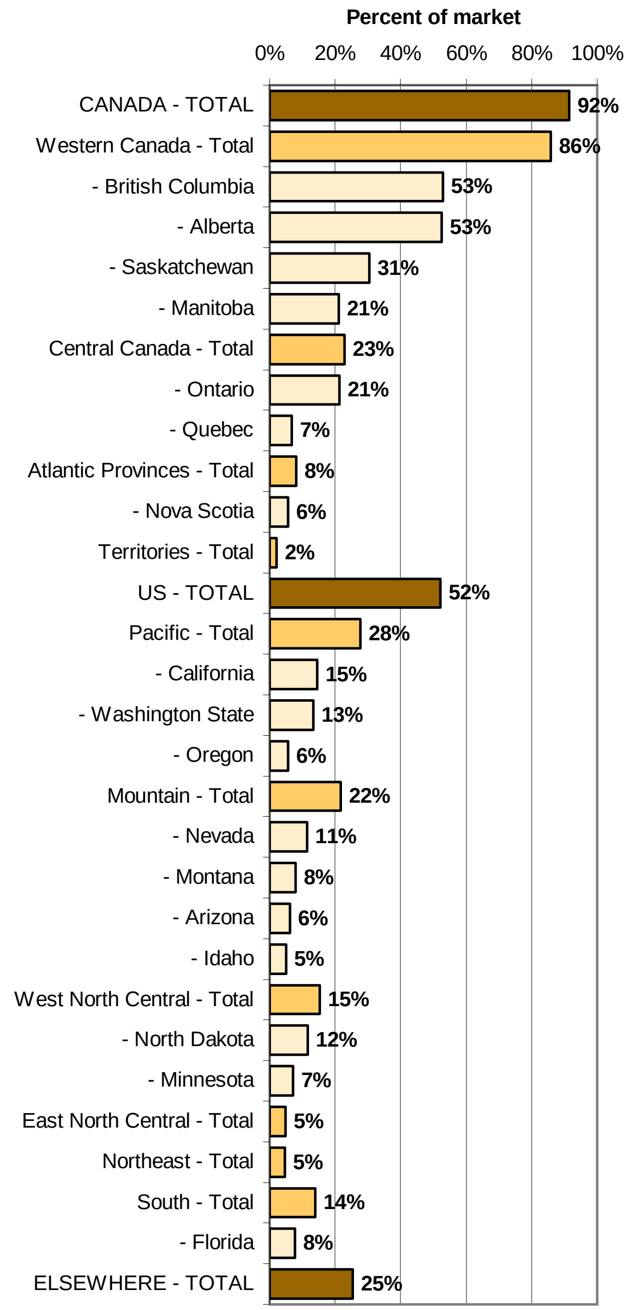
Within Canada and the US the most popular destinations tended to be located close to home. The overall patterns may be seen in Exhibit 1, which shows provinces and states visited by at least 5% of the western Canadian residents included in the target market.

Virtually everyone had visited a destination in western Canada at least once, with the most popular provinces being British Columbia (BC) and Alberta (53% each).

The next most popular region was the US Pacific at 28%, including California, Washington, Oregon, Hawaii and Alaska.

Of equal interest were the US Mountain region (Nevada, Montana, Arizona and Idaho in particular, also Utah, Colorado and New Mexico) and Central Canada, especially Ontario.

Exhibit 1: Most popular North American pleasure or vacation destinations in the past three years (n=1400)



Location makes a difference

The choice of destination was influenced primarily by place of residence, but other factors were clearly at play as well. Table 1 profiles the destinations by geographic market.

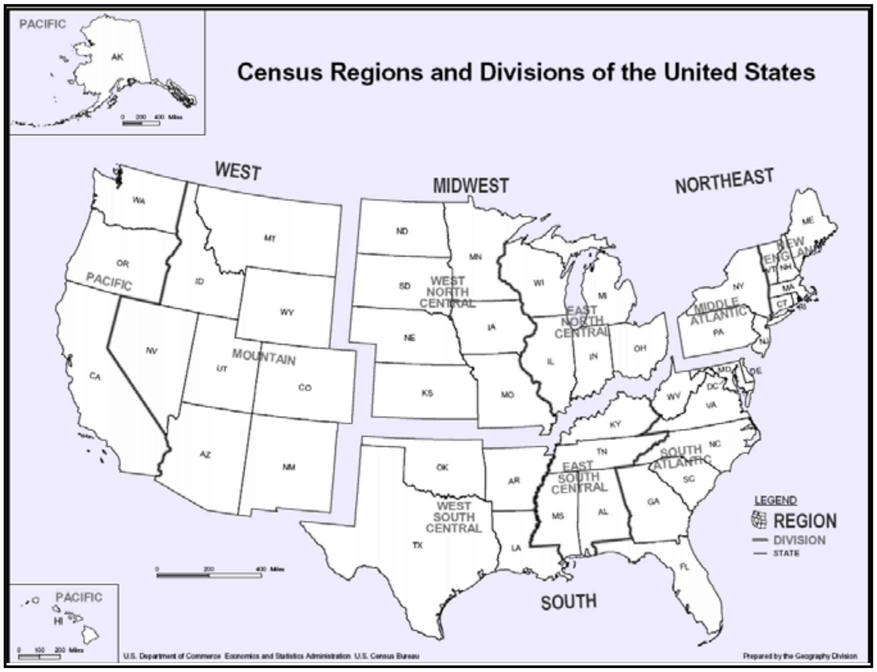
Table 1: Destinations visited by geographic market (n=1400)

	Total %	Vancouver %	Kamloops/ Kelowna %	Edmonton %	Calgary %	Saskatoon %	Regina %	Winnipeg %
CANADA - TOTAL	**92**	**86****	**95***	**89**	**94**	**94**	**97***	**87****
Western Canada - Total	86	79**	92*	84**	86	92*	94*	73**
- British Columbia	53	66*	81*	53	70*	36**	38**	26**
- Alberta	53	27**	47**	61*	52	72*	68*	40**
- Saskatchewan	31	7**	10**	25	21	61*	60*	29
- Manitoba	21	6**	9**	14**	12**	25*	32*	51*
Central Canada - Total	23	22	15**	25	23	18	22	35*
- Ontario	21	20	14**	22	20	18	22	34*
- Quebec	7	7	8	10	7	4	4	7
Atlantic Provinces - Total	8	4	5	16*	10	4	9	8
- Nova Scotia	6	3	4	10*	7	4	7	5
Territories - Total	2	+	1	2	1	0	1	0
US - TOTAL	**52**	**65***	**49**	**51**	**52**	**40****	**49**	**60***
Pacific - Total	28	58*	41*	21	29*	16**	17**	11**
- California	15	28*	18*	11**	20*	8**	11**	6**
- Washington State	13	37*	31*	4	9	7	3**	3**
- Oregon	6	13*	13*	2	5	4	2	1**
Mountain - Total	22	19	21	27	28	20	24	13**
- Nevada	11	9	11	16	16	10	12	6
- Montana	8	3**	5	6	11*	10	16*	5**
- Arizona	6	8	6	7	11	3**	6	4
- Idaho	5	3	8	6	8	6	4	1**
West North Central - Total	15	4**	4**	3**	5**	14*	30*	48*
- North Dakota	12	2**	2**	2**	3**	9*	26*	38*
- Minnesota	7	2	0**	2	1**	5	10*	30*
East North Central - Total	5	4	2	2	4	7	4	11*
Northeast - Total	5	6	3	8	5	3	4	4
South - Total	14	12	6**	11	21*	12	14	23*
- Florida	8	6	2**	5	13*	4**	10	15*
ELSEWHERE - TOTAL	**25**	**30**	**26**	**26**	**27**	**17****	**25**	**28**

* Significantly higher than other markets ** Significantly lower than other markets
+ Less than 0.5%

Different regions and cities showed different destination patterns:

- **BC residents** were less likely to visit western Canadian destinations, with the exception of their own province. They were more likely to be drawn to the US in general and the US Pacific region in particular, showing higher levels of visiting Washington, Oregon and California. They were less interested in US West North Central states and Kamloops/Kelowna residents – but not Vancouver residents – were underrepresented as visitors to the American South and Florida in particular.



- **Albertans** in the two major cities showed some similarities and some dissimilarities. Both were less likely to visit Manitoba and the US West North Central region. Although not a large destination, they were far more likely to visit Hawaii (8% each) than other westerners.

  In Canada, Edmontonians favored Alberta destinations more often as well as all the Atlantic Provinces, but especially Nova Scotia and New Brunswick.

  Calgarians headed west to BC and California or south to Montana more often. They were also drawn to Florida at an above average rate.

- Residents of the two **Saskatchewan** cities showed more congruent destination patterns. Both were especially likely to travel in western Canada, particularly in their own province … and even more in Alberta. They also visited Manitoba at an above average rate.

  Saskatoon residents were below average visitors to the US (especially Arizona and Florida, suggesting that fewer were snowbirds) and foreign destinations, but visited Wyoming (5%) more often than average.

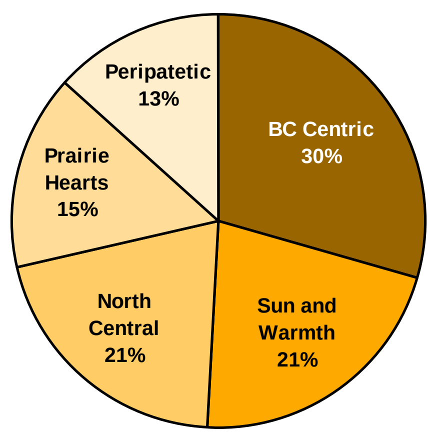
  Both cities were less likely to visit the Pacific area, whether BC or the US Pacific region states. Instead, they tended to head south to the adjacent states of North Dakota and Montana, with Regina residents also favoring Minnesota.

- **Winnipeg** destinations were focused more to the east than to the west, being overrepresented in visits to Central Canada (especially Ontario) adjacent US West North Central states (North Dakota and Minnesota), the East North Central region and the US South (Florida). They were underrepresented in visiting western Canadian destinations other than Manitoba itself, and the US Pacific and Mountain regions.

Personal needs are part of the equation

It is obvious that the destinations favored correspond well with proximity to place of residence, but that is not the only factor that influences choice. A special analysis of the data revealed that people can be classified into five meaningful groups favoring different clusters of destinations (Exhibit 2). They are influenced by proximity, but there appears to be more at play than distance.

Exhibit 2: Destination clusters (n=1400)



- The largest cluster has been named **BC Centric**. 100% of the members of this cluster visited BC in the past three years and this was the only destination they favored at an above average rate. In addition, they were significantly less likely to visit some places, including most Canadian (Atlantic Provinces, Central Canada and Saskatchewan) and US destinations (especially the South and Florida). Alberta was visited at an average rate (55%) as may be seen in Table 2.

  BC Centric individuals predominated in Kamloops/Kelowna, Calgary and Edmonton (Exhibit 3). While many Vancouverites fell into this cluster, it was a distant second to destinations that provide Sun and Warmth. Winnipeg residents were the least likely to belong to this group.

  There were virtually no identifying demographic characteristics for the BC Centric cluster, though slightly more than average were Real Relaxers (26%) and fewer were Urban Explorers (34%), due to their interest in tranquil rural locations. However, this was not a major determinant.

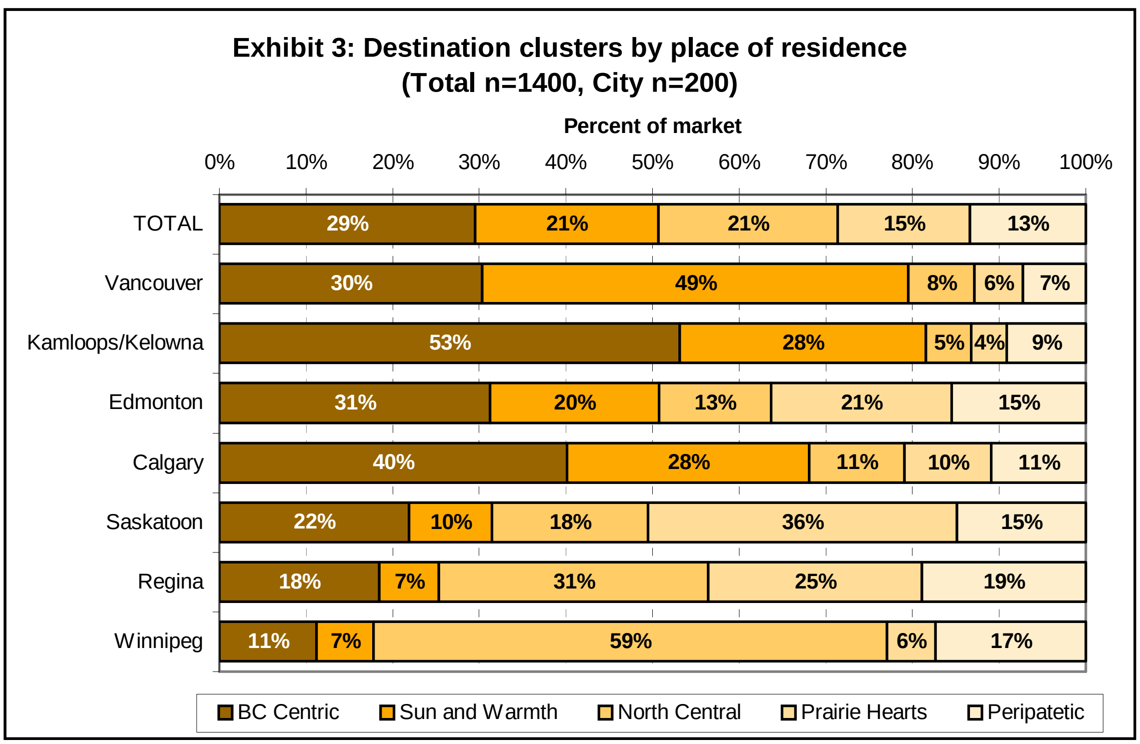
- Warm weather destinations formed the second largest cluster, termed **Sun and Warmth**. People in this cluster much preferred US destinations and were underrepresented in visiting any Canadian locations – and particularly locations in western Canada other than BC, where they were average. This segment was the least likely of all to visit Alberta (only 25% did so) and virtually no one had been to Saskatchewan or Manitoba.

While they appeared to be prairie-phobes, members of the Sun and Warmth cluster were not averse to US interior states, visiting the Mountain region at an above average rate (especially Montana, Nevada and Arizona).

Table 2: General destination cluster profiles

	Total (n=1400) %	BC Centric (n=401) %	Sun and Warmth (n=284) %	North Central (n=279) %	Prairie Hearts (n=207) %	Peripatetic (n=181) %
CANADA	**92**	**100**	**71****	**93**	**90***	**95**
Western Canada	86	100	62**	79	98*	88
- Alberta	53	55	25**	27**	76*	73*
Central Canada	23	8**	16	46*	1**	56*
Atlantic Provinces	8	3**	7	7	2**	30*
Territories	2	3	0	1	1	5*
US	**52**	**21****	**97***	**49**	**16****	**95***
Pacific	28	9	78*	7	3**	50*
Mountain	22	6	43*	4	7	66*
West North Central	15	2	2	32*	3	53*
East North Central	5	0	1	6	1	24*
Northeast	5	2	4	5	1**	16*
South	14	4**	18	13	3**	42*
ELSEWHERE	**25**	**23**	**30**	**26**	**8****	**42***

* Significantly higher than other clusters ** Significantly lower than other clusters



Their greatest distinction though, was their high preference for US Pacific region states, including California, Washington and Hawaii … and Florida.

The Sun and Warmth cluster predominated in Vancouver and drew a large cohort in Kamloops/Kelowna and Calgary, followed by Edmonton.

Cluster members were somewhat more often aged 55-64 years, had a high school diploma and fell into the lowest income group. They were slightly more often Urban Explorers (44%), but these characteristics did not form important points of differentiation.

- By far the most dominant cluster in Winnipeg and overrepresented in Saskatchewan and especially in Regina, the **North Central** cluster included destinations in Central Canada, Manitoba and the US West North Central, especially Minnesota. Other somewhat overrepresented destinations were Saskatchewan, North Dakota and Florida.

  Location was the only characterizing feature as there were neither demographic nor psychographic determinants.

- The **Prairie Hearts** cluster captures the commonalities of many residents of Saskatoon, Regina and Edmonton.

  A well above average proportion of cluster members visited Canadian destinations, while both the US and other foreign countries were much less likely to be visited. Within Canada, their attention was focused entirely on Alberta (76%) and Saskatchewan (64%); not a single person had visited either Manitoba or BC and they were also well below average visitors to the Atlantic Provinces and Central Canada.

  This cluster was especially likely to include Real Relaxers (28%), embracing rural tranquility. Cluster members also had a particular preference for familiar places (71%) in which to strengthen family bonds.

  From a demographic perspective, they were strongly overrepresented in larger households, predominantly households with pre-school children and two parents in the 25-34 or 35-44 years age groups. They were underrepresented among empty nesters.

  Also notable was their overrepresentation in the lowest household income group and the finding that they had the lowest average income of all clusters. Having a low income together with a large family size, suggests that stretched budgets may be a driving issue in the choice of destination. In all likelihood, VFR (visiting friends and relatives) is a key motivator, since it is just this lifestage that tends to visit parents/grandparents and other relatives for both family face-time and affordability reasons.

- While the smallest of all destination clusters, the **Peripatetic** group was unique in not being driven by geographic location or having a distinct set of destinations. Instead, they had very high levels of visiting all locations in Canada, the US and elsewhere in the world. Visit rates were significantly higher for every region and virtually every province or state.

  This is one of two groups in which Alberta was very frequently mentioned (73%) – the other being Prairie Hearts – but the competition is the whole world!

Cluster members appear to have a high degree of freedom to travel. Economic freedom was suggested by having the highest average household income of all groups and the highest proportion with an income of over $100,000, with fully half enjoying an income of $70,000 or more. Personal freedom was suggested by their lifestage. Almost half were empty nester couples – again the highest proportion among all clusters – supporting the smallest households and providing "built-in" travel companions. 40% of this group were aged 55-64 and likely either at their highest earning level or early retirees.

Accomplishers were overrepresented in this cluster (23%) – again the highest among all clusters – due to their interest in seeing unfamiliar (53%) new places (53%). They were also the only group with a high proportion interested in challenging themselves on a leisure trip (45%). Real Relaxers were underrepresented (16%) in the Peripatetic cluster.

For two of the five clusters, the predominant influence remained location and proximity (North Central and Prairie Hearts). However, if that were the only criterion, the link between place of residence and travel patterns would be clearer than they are for the BC Centric and Sun and Warmth clusters. Based on focus group discussions, we suggest that an element of group-think – call it social endorsement, popularity, the influence of what is promoted (formally or informally) in each city, or the way in which weather is regarded by the city's residents – influences these patterns as well.

Visits to Alberta

VISITED AT ALL

Looking again at the data in Table 1 for Alberta, just over half of all western Canadians in the target markets had visited the province in the past three years, with the proportion being highest in Regina, Saskatoon and Edmonton (72%, 68% and 61% respectively). It was lowest of all in Vancouver (27%), followed by Winnipeg (40%) and about average in Kamloops/Kelowna (47%) and Calgary (52%). Note that the overall rate of 53% is based on equal importance being given to each market. If population proportionate figures were used, that rate would be lower (44%), since Vancouver would have much greater influence on the total and Kamloops/Kelowna would barely be represented in it. The 53% total figure is an average and simply provides a base for comparison across the markets, treating each one as equally important.

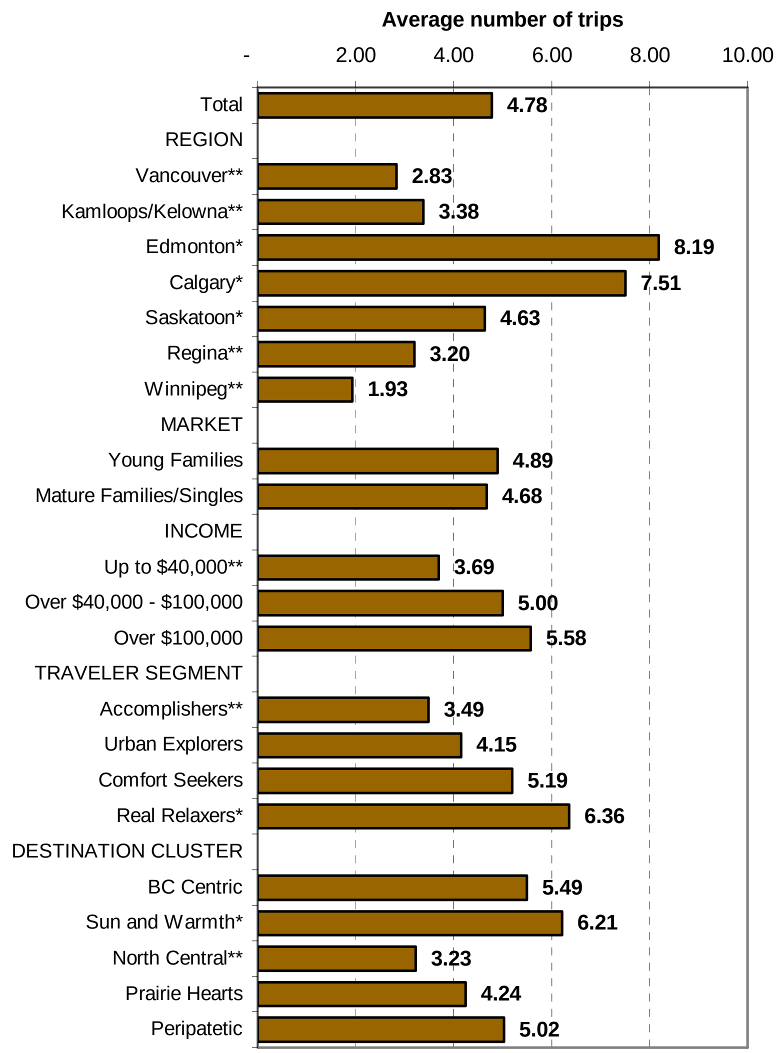
Demographically, the only distinguishing characteristic of visitors to Alberta was a smaller proportion in the Mature Families/Singles group (50% vs. 57% for Young Families), especially among grown families (i.e., with adult children living at home) and older singles/groups (50-69 year olds living alone or with several other adults) – both 40%. There were no significant differences by traveler segment.

In terms of destination clusters, Table 2 showed that the Prairie Hearts and Peripatetic clusters were most likely to have visited Alberta (roughly three in four members had), while those belonging to the BC Centric cluster were average visitors (one in two). The Sun and Warmth and North Central clusters visited at a far lower rate (about one in four).

TRIP FREQUENCY

Alberta visitors were asked how many times they had been there on a pleasure or vacation trip lasting at least one night in the previous three years.

Exhibit 4: Average number of vacation or pleasure trips made to Alberta in the past three years by Alberta visitors (n=736)



* Significantly higher **Significantly lower

The median number of trips was 3, indicating that half the Alberta visitors took one or more trips to Alberta per year and half took fewer than that. The average number of trips taken varied by location and demographic group as shown in Exhibit 4.

Albertans were the most frequent Alberta travelers, followed by residents of Saskatoon. Those who visited from Winnipeg and Vancouver made the fewest trips.

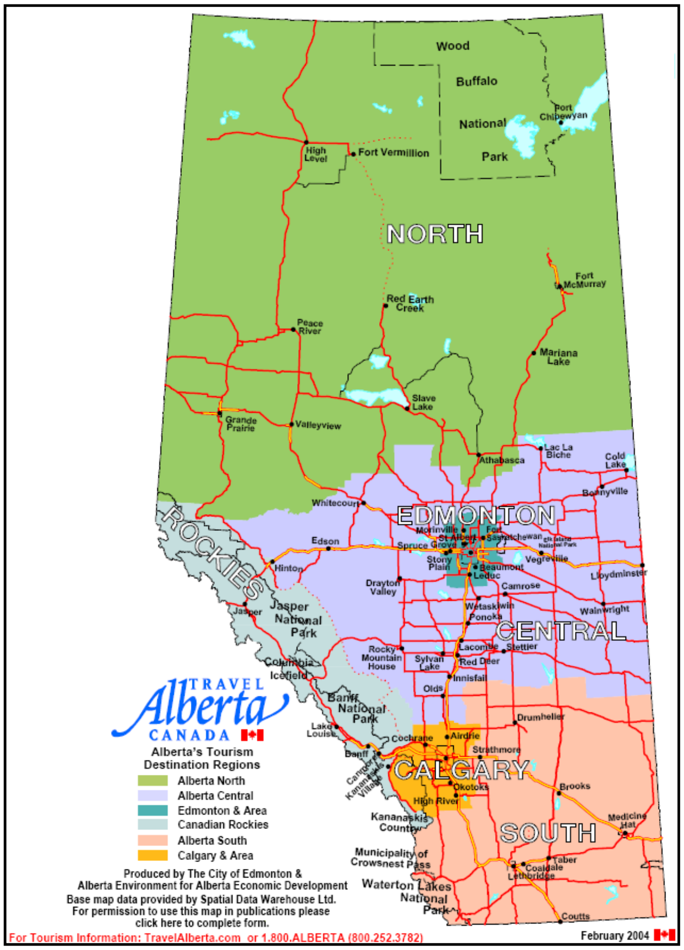
There were no significant differences by target market or by the more detailed lifestages among those who did visit. However, income played a role, with an increasing number of trips being made with increasing income – and significantly fewer in the lowest income group.

In the traveler segments, Real Relaxers were by far the most frequent visitors, followed by Comfort Seekers. Accomplishers made significantly fewer trips to Alberta.

While the propensity to visit Alberta was very distinctive by destination cluster, the number of trips made by those who did visit showed a different pattern. The only exception was that travelers to North Central destinations were both less likely to visit and made fewer trips to Alberta. The high likelihood Peripatetic and Prairie Hearts clusters were only average in their visit frequency, though this is likely for very different reasons (income constraints for Prairie Hearts and the lure of many other destinations for Peripatetics). The biggest surprise though, was the large number of trips made by the Sun and Warmth and BC Centric cluster members who do visit. This may be influenced by the many Calgary residents in both groups.

"Heavy" or more frequent visitors to Alberta, those who visited on average more than once per year in the past three years (the average being 9.2 and the median 6), differed in their travel behavior from "light" or less frequent visitors (average 1.9, median 2) and non-visitors in the following ways:

- More often international travelers while non-visitors were more often US visitors:
- Very likely to also visit BC and belong to the BC Centric cluster, while non-visitors were less likely to visit any of the three prairie provinces;
- Very likely to visit the US Mountain region and Nevada in particular, while non-visitors were less likely to visit Montana, Idaho and Wyoming.
- Non-visitors were more often Sun and Warmth cluster members and less likely to be Prairie Hearts or Peripatetic.



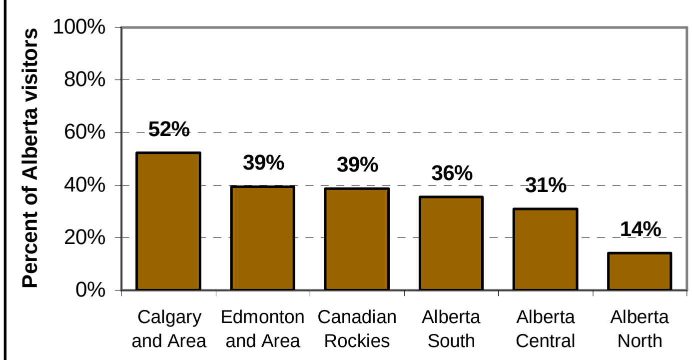
TOURISM DESTINATION REGION VISITED

Using flash technology, the map of Alberta shown alongside was displayed and respondents could use a magnifying glass to examine highways and place names in more detail. They were asked to indicate which of the TDRs they had visited in the past three years. If they still weren't sure, they could write down their destination and that was coded afterwards.

The overall results are displayed in Exhibit 5. This shows that Calgary and Area was the TDR visited by the largest proportion of visitors in the market, while Alberta North had the smallest.

The results vary quite substantially by place of residence as may be seen in Table 3.

Exhibit 5: Tourism Destination Regions visited on pleasure or vacation trips in Alberta in the past three years (n=736)



- Calgarians were by far and away the most likely geographic market to have visited Alberta South, while Kamloops/Kelowna and Saskatoon residents were the least likely to have done so.
- Calgary and Area was the region most likely to be visited by every market except Edmonton (and by Calgarians themselves).

- However, among Saskatoon residents, Edmonton and Area was as frequently mentioned as Calgary and Area. The only other geographic market with a similarly strong urban distribution was Vancouver.
- Kamloops/Kelowna residents, along with Vancouver residents, mentioned visiting the Canadian Rockies less often than average, while Edmonton and Calgary had the highest propensity to do so.
- Regina and Winnipeg visitors were far less likely than average to have visited Alberta Central or Alberta North and no Vancouver residents had been to the latter region.

Table 3: Alberta TDRs visited by geographic market (n=1400)

	Total %	Vancouver %	Kamloops/ Kelowna %	Edmonton %	Calgary %	Saskatoon %	Regina %	Winnipeg %
Calgary and Area	52	56	58	49	21**	56	64	62
Edmonton and Area	39	47	34	25**	37	55*	39	37
Canadian Rockies	39	25	23**	58*	54*	31	35	38
Alberta South	36	29	18**	44	58*	25**	35	40
Alberta Central	31	30	34	41*	43*	31	16**	24**
Alberta North	14	0**	16	25*	18	15	9**	8**

* Significantly higher than other markets ** Significantly lower than other markets

Demographically, the only noteworthy finding was that visitors to the Canadian Rockies were found increasingly with increasing income and education – and the difference was substantial, rising from 29% in the lowest income group, to approximately 39% in the middle and 49% in the highest.

Real Relaxers favored the Canadian Rockies to an above average degree and were less likely to visit the major cities. Urban Explorers were the opposite. Accomplishers were slightly overrepresented in visiting Calgary and Area.

Bigger differences were found by destination cluster (Table 4) with the Peripatetic cluster being more likely to have visited all TDRs other than Alberta Central, particularly the Canadian Rockies and also Calgary and Area and Alberta South. Prairie Hearts were less likely than average to have visited the Canadian Rockies, Calgary and Area, Edmonton and Area and Alberta South. The Sun and Warmth cluster were found more often to be Canadian Rockies visitors.

Heavy or frequent Alberta visitors were more likely to visit the Canadian Rockies, Alberta South, Alberta Central and Alberta North than medium visitors, while rates of mention of the two city centered regions were similar for both heavy and medium visitors. In other words, those who traveled in Alberta more often did so by also visiting rural regions.

Table 4: Alberta TDRs visited by destination cluster

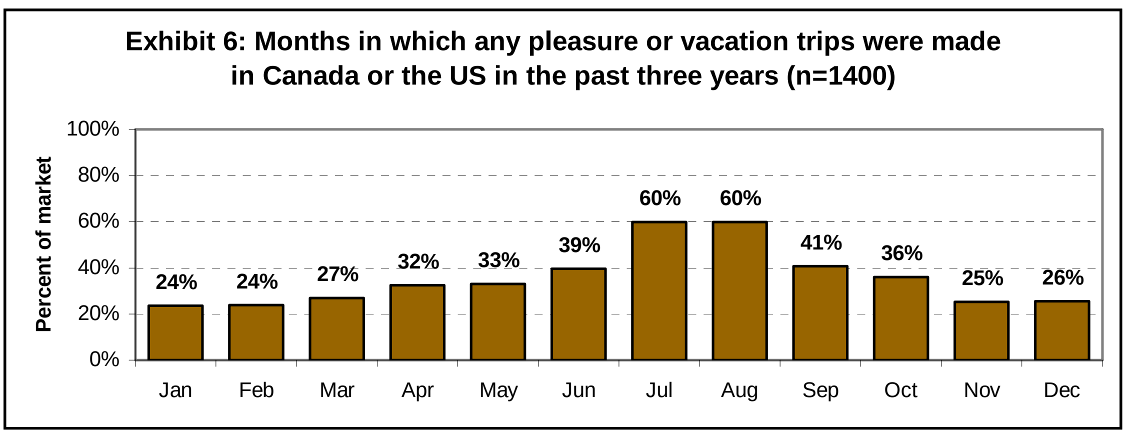
	Total (n=1400) %	BC Centric (n=401) %	Sun and Warmth (n=284) %	North Central (n=279) %	Prairie Hearts (n=207) %	Peripatetic (n=181) %
Calgary and Area	52	54	44**	58*	40**	63*
Edmonton and Area	39	40	42	40	29**	48
Canadian Rockies	39	38	48*	35	23**	58*
Alberta South	36	37	36	36	23**	48*
Alberta Central	31	36	34	26	29	28
Alberta North	14	17	13	6**	14	17

* Significantly higher than other clusters ** Significantly lower than other clusters

SEASONALITY

For each province or state visited for pleasure or vacation in the past three years, the respondent was asked in what month/s they had been there. The results show what proportion had traveled in each month of the year.[3]

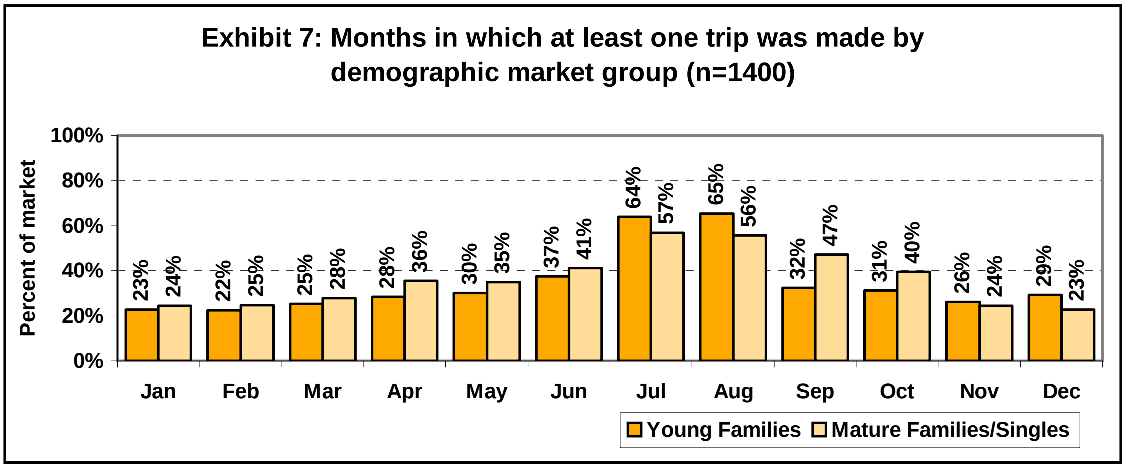
Exhibit 6 shows the results. From this it may be seen that July and August remain the most popular months of the year in which to travel. The lowest proportions were found for November, December, January and February.



The key influencer for traveling in different months relates to demographic market group and lifestage, as may be seen in Exhibit 7. Young Families were significantly more likely than Mature Families/Singles to travel during the summer school break, July and August (especially school-

3. As the information is not trip based, the data should not be interpreted any other way.

age families), and in December, probably for Christmas VFR reasons since it was pre-school families that were particularly likely to be traveling at this time.



Mature Families/Singles were significantly more likely to travel in the shoulder months, April through June, September and October. And within this group, it was empty nesters rather than older singles/groups that were traveling.

Other demographic differences included a lower incidence of travel in all months in the lowest income and education groups, while the most affluent segment were more likely than average to travel in the second quarter.

There were no significant differences in the timing of travel between the four traveler groups, but the destination clusters showed distinct patterns of travel by month that enhance the earlier descriptions. These results are shown in Table 5.

The Peripatetic travelers were more likely than any other group to travel in every month of the year. Seasonality still exists in this group, albeit at a different rate.

At the opposite end of the spectrum, the Prairie Hearts cluster was less likely to travel in every month – and rarely left home in the winter months, other than for Christmas. Their incidence of travel in June/July was not significantly below average and the most likely months of travel were July and August.

The only cluster to show a completely different pattern was Sun and Warmth. Sun seekers traveled at an above average rate in the first quarter and stayed home in the good weather in June and July.

The close-in travelers of the BC Centric and North Central clusters were average.

Table 5: Months of travel by destination cluster

	Total (n=1400) %	BC Centric (n=401) %	Sun and Warmth (n=284) %	North Central (n=279) %	Prairie Hearts (n=207) %	Peripatetic (n=181) %
January	24	24	28*	23	14**	38*
February	24	24	30*	22	12**	35*
March	27	27	37*	21	14**	39*
April	32	32	36	30	22**	49*
May	33	33	29	36	22**	46*
June	39	39	31**	41	34	59*
July	60	60	49**	62	55	75*
August	60	60	56	62	49**	69*
September	41	41	42	37	30**	60*
October	36	36	37	36	28**	48*
November	25	25	24	22	16**	44*
December	26	26	23	26	23**	39*

* Significantly higher than other clusters ** Significantly lower than other clusters
Note: Percentages do not add as each cell is independent. Read as follows, for example, 24% of BC Centric travelers took at least one trip in January while 60% took at least one trip in July.

Tables 6a and 6b show the proportion of travelers to a region who visited in each month and Exhibit 8 displays this distribution for Alberta.

Table 6a: Months of travel to Canadian destinations

	Western Canada (n=1190) %	Central Canada (n=315) %	Atlantic Provinces (n=112) %
January	17*	7	3
February	18*	5	5
March	20*	7	5
April	26*	12	5
May	30*	16	12
June	37*	19	15
July	60*	30	30
August	56*	30	22
September	36*	24	19
October	29*	18	17
November	20*	9	4
December	22*	8	5

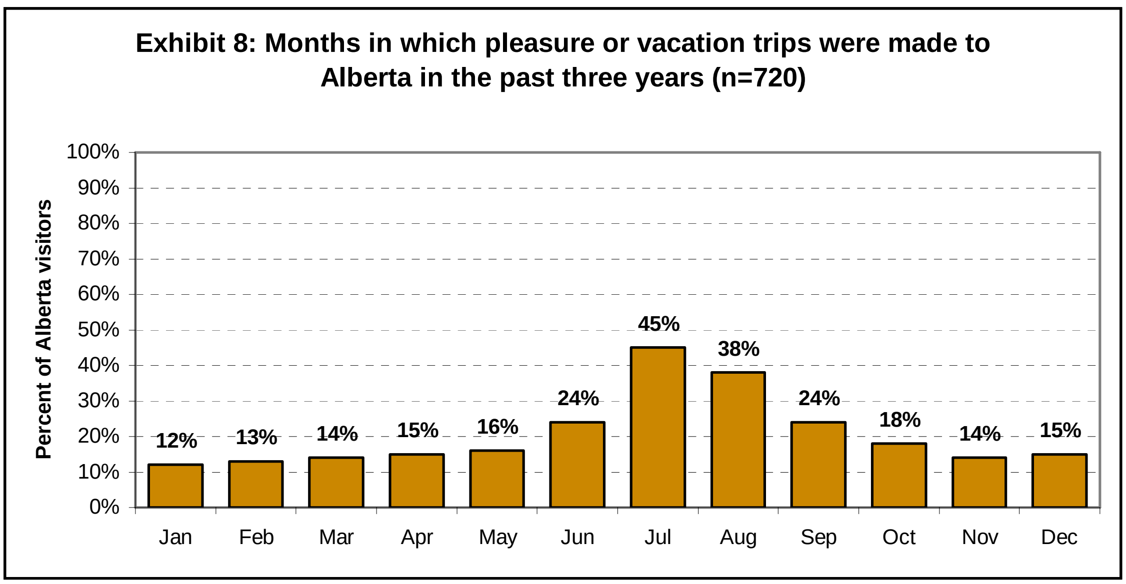
* Significantly higher than other Canadian regions ** Significantly lower than other Canadian regions
Note: Percentages do not add as each cell is independent. Read as follows, for example, 17% of travelers to western Canada took at least one trip to a western Canadian province in January while 60% took at least one trip there in July.

Table 6b: Months of travel to US destinations

	Pacific (n=374) %	Mountain (n=292) %	West North Central (n=206) %	East North Central (n=66) %	Northeast (n=63) %	South (n=190) %
January	14*	11	8	3**	5**	21*
February	17*	17*	8**	2**	3**	18*
March	19*	16*	9	5**	6**	15
April	19*	14	12	6**	6**	14
May	14	9	11	8	18	8
June	13	8	16*	14	12	6**
July	26	19	30*	34	16	8**
August	26	23	32	35	21	14**
September	19	15	17	10	17	12
October	14	15	16	4**	15	15
November	13	13	12	9	10	9
December	10	9	5	2**	6	10

* Significantly higher than other US regions ** Significantly lower than other US regions
Note: Percentages do not add as each cell is independent. Read as follows, for example, 14% of travelers to the US Pacific region took at least one trip to a Pacific state in January while 26% took at least one trip there in July.

The figures for Alberta indicate that the most popular month for visiting was July, followed by August. June and September were strong shoulder months. A fairly similar proportion visited in each of the remaining months, though there is an evident decline as the months get cooler, interrupted only by Christmas travel in December, and a slow build up as the months get warmer from the low in January.



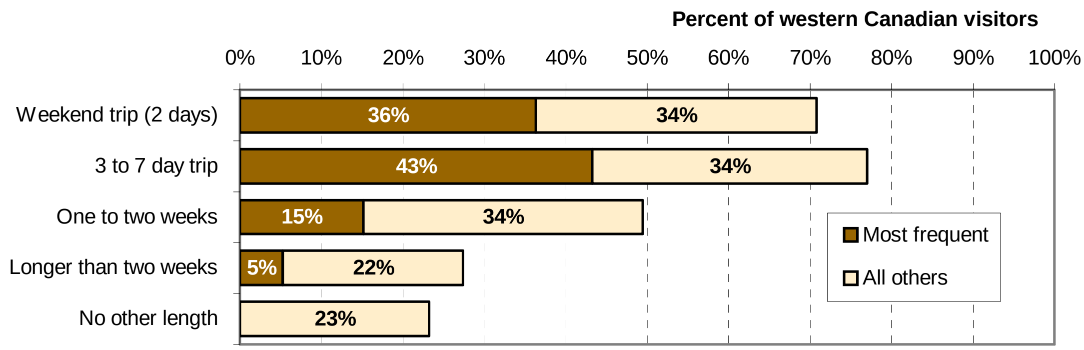
Exhibits 9a-d show that Alberta residents were more likely to travel in the province in all months of the year, but followed the same general pattern, as did Saskatchewan. Seasonality was most pronounced among Winnipeg residents, who visited at far lower rates each month and with greater concentration in July and August. BC residents had a much flatter distribution, with greater than average support of the province in the fall shoulder season, especially in September, and proportionately lower visitation in July and August.

Frequent or heavy Alberta visitors were more likely to travel in every month of the year, in general and to Alberta.

TRIP DURATION

Trips lasting at least one night within western Canada were most often 3 to 7 days in length, with the second most popular duration being 2 day weekend trips. Exhibit 10 shows both the most frequent duration and all others taken in the past thee years in western Canada. Longer trips, while taken by at least half the visitors to western Canada, occurred less frequently.

Exhibit 10: Length of trips taken in western Canada in the past three years (n=1201)



Saskatoon residents were less likely than average to take vacations of one to two weeks (39% vs. 55%) or longer (18% vs. 27%). The pattern was even stronger for the Prairie Hearts cluster (36% and 18% respectively) which tended to concentrate on weekend trips (50% most frequent).

Lifestage differences appeared to have some influence on trip duration. Grown families were more likely to take weekend trips and teen families (with the youngest child aged 12-17) were less likely to take 3 to 7 day trips. Mature Families/Singles, especially empty nesters and older singles/groups, were less frequent weekend travelers.

Income plays a role too, as the highest income group was more likely to take 3 to 7 day trips.

Exhibit 9a: Months in which pleasure or vacation trips were made to Alberta in the past three years by Vancouver and Kamloops/Kelowna residents

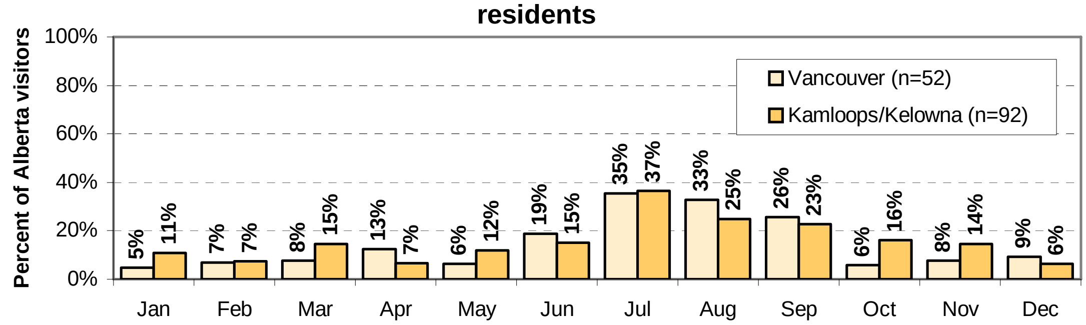


Exhibit 9b: Months in which pleasure or vacation trips were made to Alberta in the past three years by Edmonton and Calgary residents

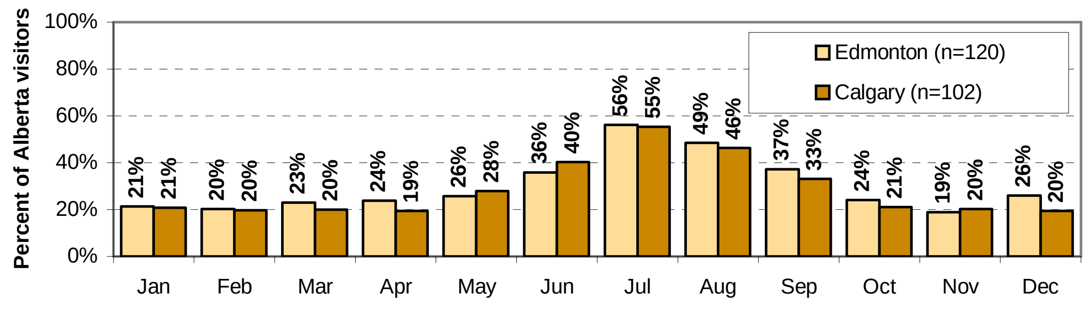


Exhibit 9c: Months in which pleasure or vacation trips were made to Alberta in the past three years by Regina and Saskatoon residents

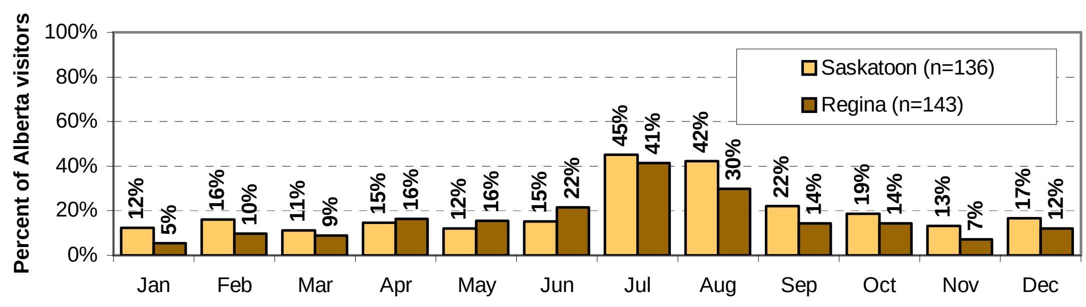
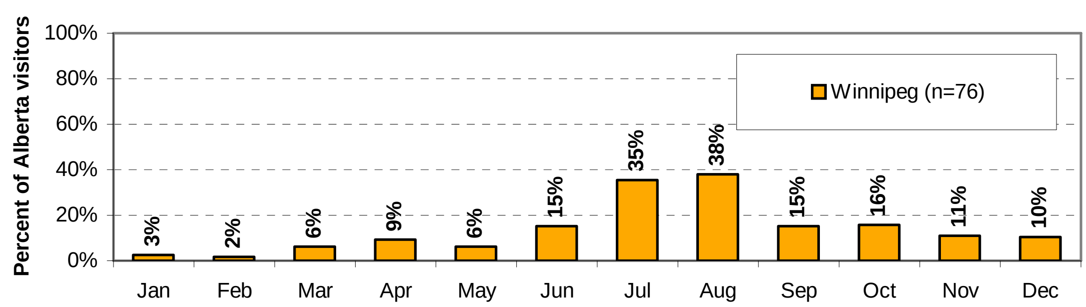


Exhibit 9d: Months in which pleasure or vacation trips were made to Alberta in the past three years by Winnipeg residents



TRAVEL PARTY COMPOSITION

Travel within western Canada is normally done with one's immediate family. Examination of Exhibit 11 reveals that 44% most often traveled with children, 26% as a two-parent family, 11% as a family with one parent and 7% with children, relatives and/or friends.

The remaining 56% were made up of adult-only travel parties – 31% as a couple, 14% alone, 7% with adult friends and 4% with adult relatives.

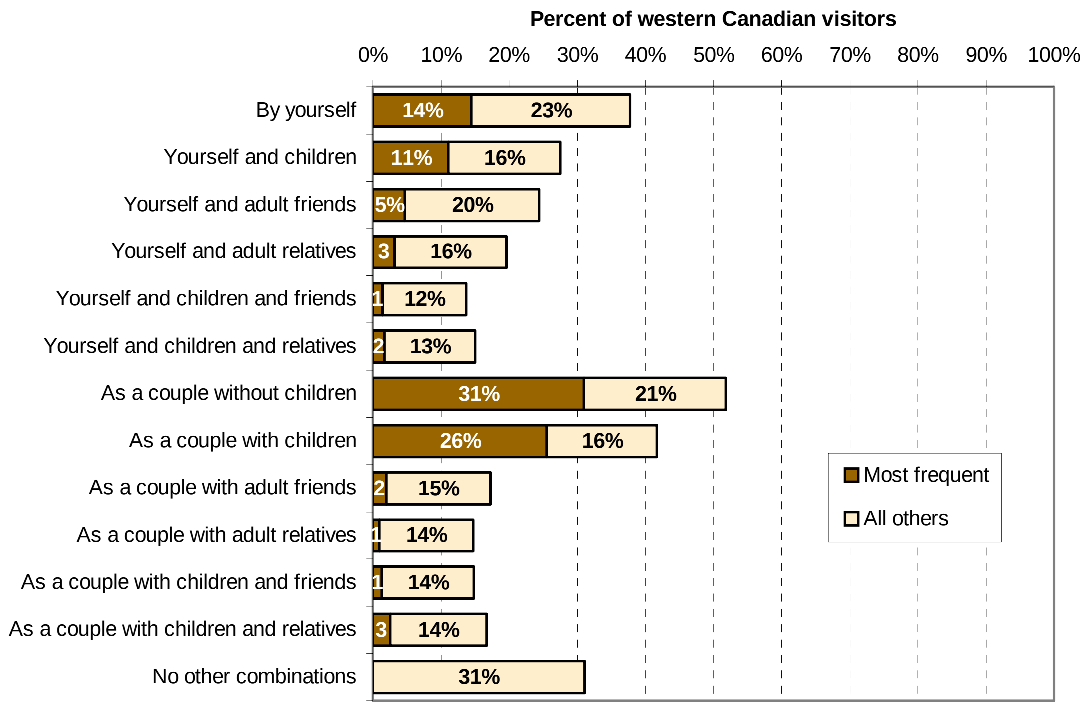


Exhibit 11: Travel companions on trips taken in western Canada in the past three years (n=1201)

The primary party composition, however, does not tell the full story. In total, 30% had traveled at some point in the past three years with adult friends (without children), 24% with adult relatives (without children), 21% as an extended family with both adult relatives and children and 18% with both friends and children, suggesting that considerable diversity beyond nuclear family travel exists.

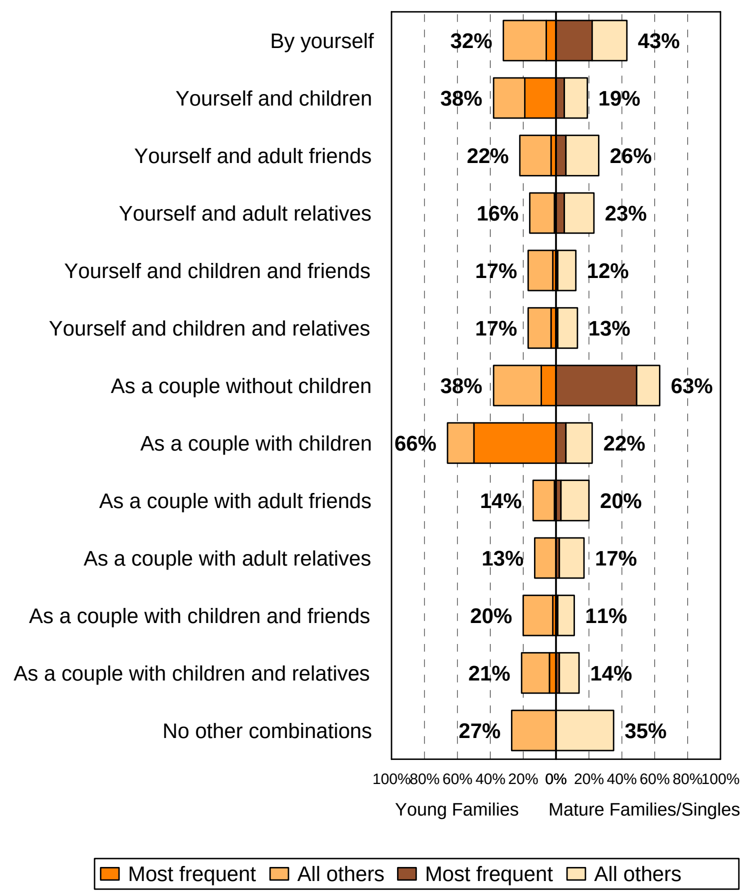
The combinations in use varied by market segment and lifestage (Exhibit 12). All Young Family lifestages traveled most often as a family with two parents and their children (50%), though this did decline as the children got older, from a high of 54% with pre-school children to 40% in teen families. The next most popular combination was one parent with children (19%). All other combinations were predominantly secondary.

In contrast, Mature Families/Singles were most likely to travel without children as a couple (49% - especially empty nesters and grown families) or by themselves (22% - especially older singles/groups). The Mature Families/Singles segment was more likely to travel with friends and relatives without children in the party, while the Young Families segment more often included children when traveling with friends and relatives.

There were few differences by place of residence or by traveler segment. However, the Prairie Hearts cluster was less likely than others to travel without children, while the Peripatetic cluster was quite the opposite, with two-thirds traveling as a couple.

Heavy Alberta travelers were also more likely to travel as a couple and, in addition, in many other party-structure combinations.

Exhibit 12: Travel companions on trips taken in western Canada in the past three years by market group (n=1202)

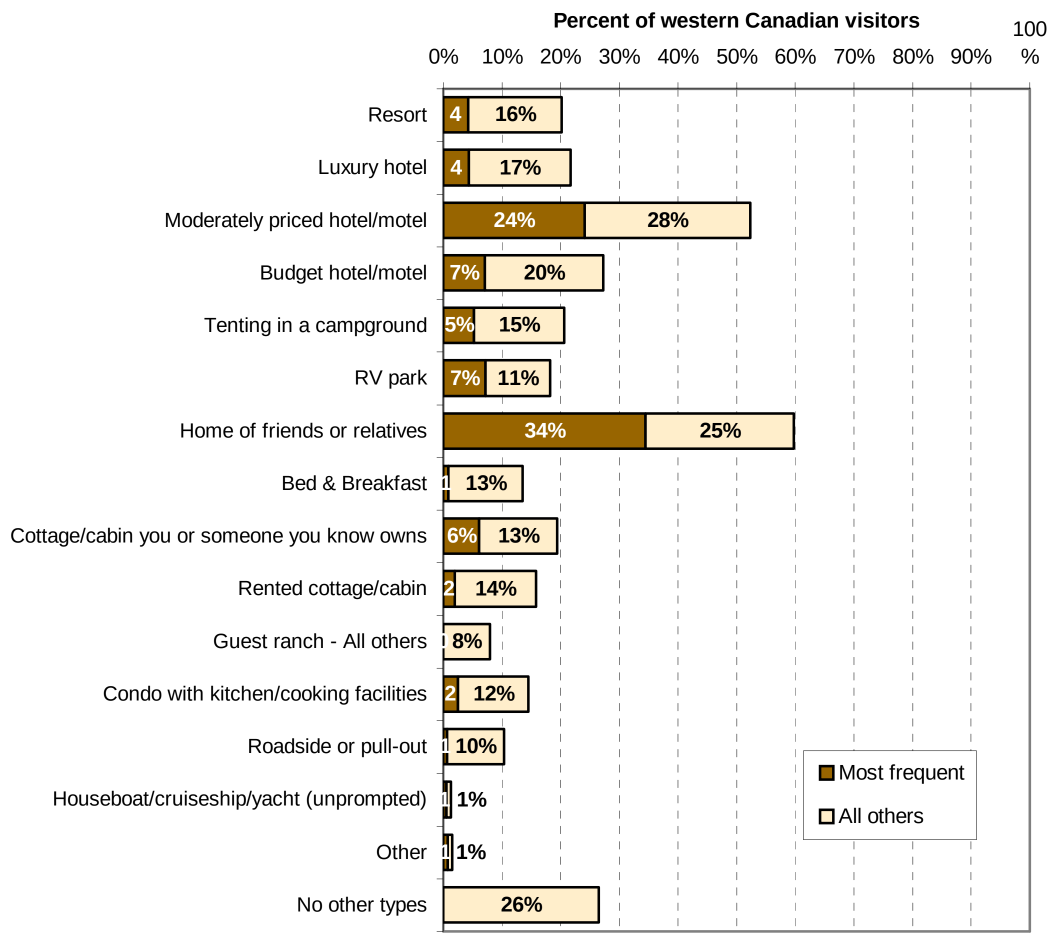


TYPE OF ACCOMMODATION

Western Canadians supported a wide range of different types of accommodation when traveling in the region, but two stood out as being most frequently used: the homes of friends and relatives and moderately priced hotels/motels (Exhibit 13). Next most popular were camping (tent or RV) followed by a budget hotel/motel or privately owned cottage or cabin.

A fair number had also stayed at luxury hotels, resorts, rented cottages/cabins, B&Bs and condos, but these were rarely the most frequent choice of accommodation. Similarly, while one in ten stopped on the roadside or used a pullout or parking lot, these tended to be a secondary choice for the RV and van owners who did so.

Exhibit 13: Accommodation used on trips taken in western Canada in the past three years (n=1201)



There were a number of distinct demographic and psychographic links to accommodation use:

- The homes of friends and relatives were especially likely to be used by older singles/groups, pre-school families and women. They were chosen increasingly with decreasing income and used much less often as the most frequent form of accommodation by the highest income group and the Peripatetic cluster. Private homes were used more often by Kamloops/Kelowna and Saskatoon residents and members of the Prairie Hearts cluster and less often by Accomplishers as their most frequent form of accommodation;

- Winnipeg residents were unique in being relatively low users of private homes, instead being twice as likely to visit private cottages/cabins (40% vs. 19% on average). A similar though more modest pattern was found for the North Central destination cluster;
- Kamloops/Kelowna residents were especially likely to camp, either in a tent or in a RV. Other groups with a preference for camping were pre-school and school-age families and, to some degree, Real Relaxers. Older singles/groups and Urban Explorers tended not to do this. Urban Explorers also tended not to use cottages/cabins, either privately owned or rented;
- Fixed roof accommodation was used somewhat more by Young Families, but the primary distinguishing characteristic was income, with use increasing as income increased for resorts, luxury hotels and moderately priced hotels/motels;
- Psychographics played a large role here. Urban Explorers and the Peripatetic cluster were significantly more likely than others to choose moderately priced hotels/motels. Those pursuing Sun and Warmth were stronger users of resorts, luxury hotels and condos and lower users of budget hotels/motels;
- Frequent visitors to Alberta were more often users of all types of fixed roof accommodation, and especially of luxury and moderately priced hotels;
- On the whole, Young Families used a greater diversity of accommodation, while older singles/groups and Edmonton residents tended to center their choices fairly narrowly.

INFORMATION SOURCES USED

On average, travelers consulted four different sources for destination information for their western Canadian trips. Exhibit 14 shows that the major source used was the Internet. One-third indicated that was used most often and a similar number used it on occasion. In general, Internet users consulted more than one type of website, with provincial or destination tourism bureau sites being the most popular, followed by travel booking sites like Expedia, Travelocity and Orbitz. Facility websites such as hotels and car rentals tended to be supplementary sites.

The next most frequently used sources were the advice of friends and family and one's own experience. These tie in to the high level of use of private homes as accommodation – and presumably VFR travel.

Of the remaining commercial options, travel associations like CAA/AMA/BCAA were the only other resource used by a substantial proportion of the population as their primary source of information.

A wide variety of other sources were consulted, some en route or while at the destination, some prior to departure.

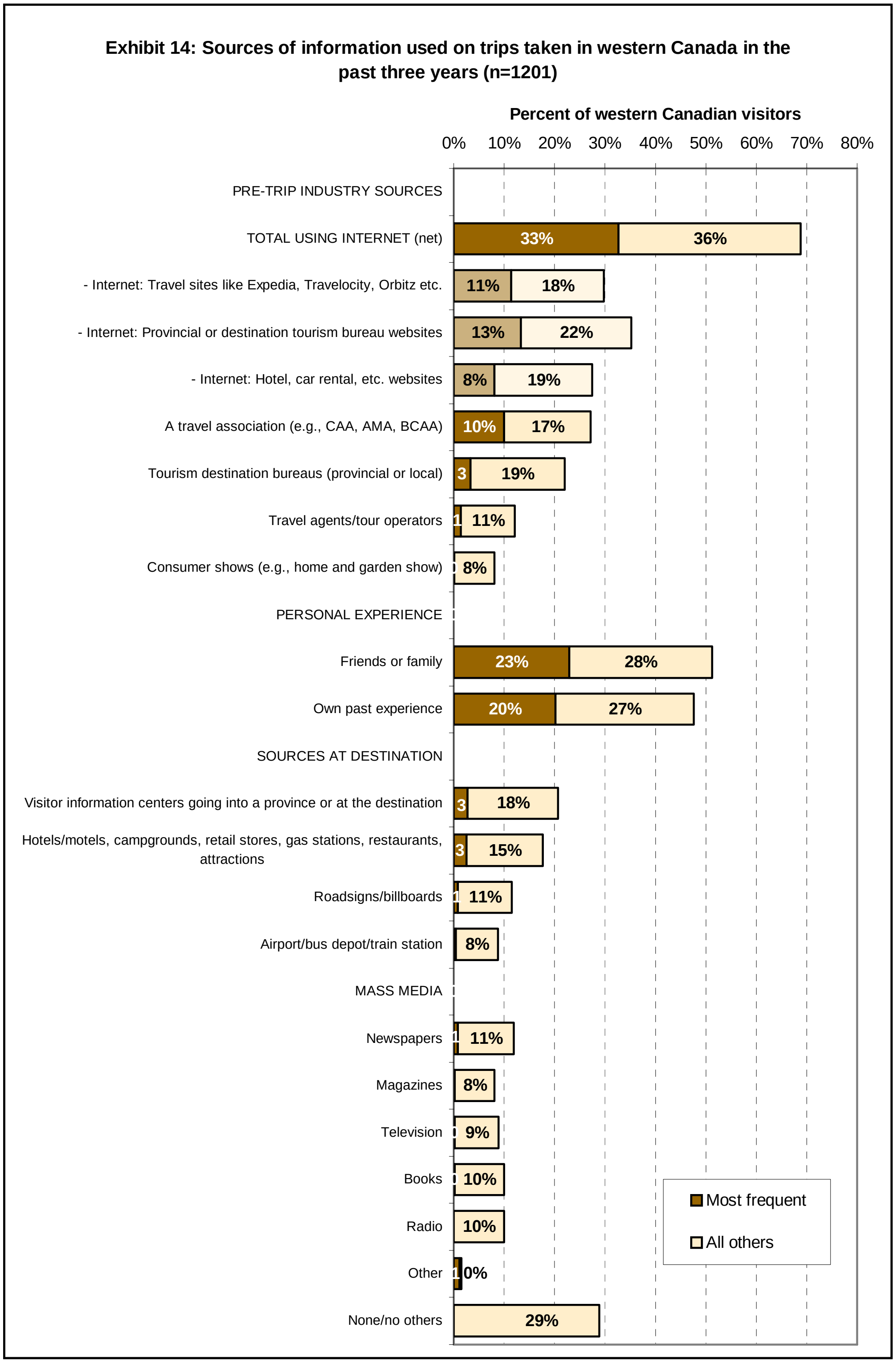


Exhibit 14: Sources of information used on trips taken in western Canada in the past three years (n=1201)
Percent of western Canadian visitors
0%
10%
20%
30%
40%
50%
60%
70%
80%
PRE-TRIP INDUSTRY SOURCES
TOTAL USING INTERNET (net)
33%
36%
- Internet: Travel sites like Expedia, Travelocity, Orbitz etc.
11%
18%
- Internet: Provincial or destination tourism bureau websites
13%
22%
- Internet: Hotel, car rental, etc. websites
8%
19%
A travel association (e.g., CAA, AMA, BCAA)
10%
17%
Tourism destination bureaus (provincial or local)
3
19%
Travel agents/tour operators
1
11%
Consumer shows (e.g., home and garden show)
8%
PERSONAL EXPERIENCE
Friends or family
23%
28%
Own past experience
20%
27%
SOURCES AT DESTINATION
Visitor information centers going into a province or at the destination
3
18%
Hotels/motels, campgrounds, retail stores, gas stations, restaurants, attractions
3
15%
Roadsigns/billboards
1
11%
Airport/bus depot/train station
8%
MASS MEDIA
Newspapers
1
11%
Magazines
8%
Television
9%
Books
10%
Radio
10%
Other
1
0%
None/no others
29%
Most frequent
All others

Men were more likely to claim the Internet as a source than women, Young Families (especially teen and school-age families) more than Mature Families/Singles, with older singles/groups having the lowest penetration at half the average rate of use. Increasing use of the Internet as the most frequent source was associated with increasing income, from 22% in the lowest income group to 48% in the highest. Non-visitors to Alberta were much less likely to be Internet users, either as a primary or supplementary source of information.

On the whole, older singles/groups used the fewest sources of information (2.5 on average), with half using just one – most often friends or family (32%). Grown families were also limited in the number of sources they consulted, being less likely than average to mention mass media and locations where one might pick up information (visitor information centers, travel associations, local tourism facilities). Empty nesters were slightly more likely than other lifestages to use a travel association, travel agent/tour operator or their own past experience most often.

Along with consulting all types of Internet sites, frequent visitors to Alberta were especially likely to have used information from a travel association, visitor information center or local tourism business, to watch roadsigns/billboards and to have taken the advice of friends and family.

In terms of traveler segments, Real Relaxers were less likely to use the Internet as a source and more likely to depend on their own previous experience. Accomplishers were somewhat more likely to use magazines, along with information gathered at visitor information centers and local tourism properties. Urban Explorers used fewer sources overall and were less likely to use tourism bureaus and visitor information centers.

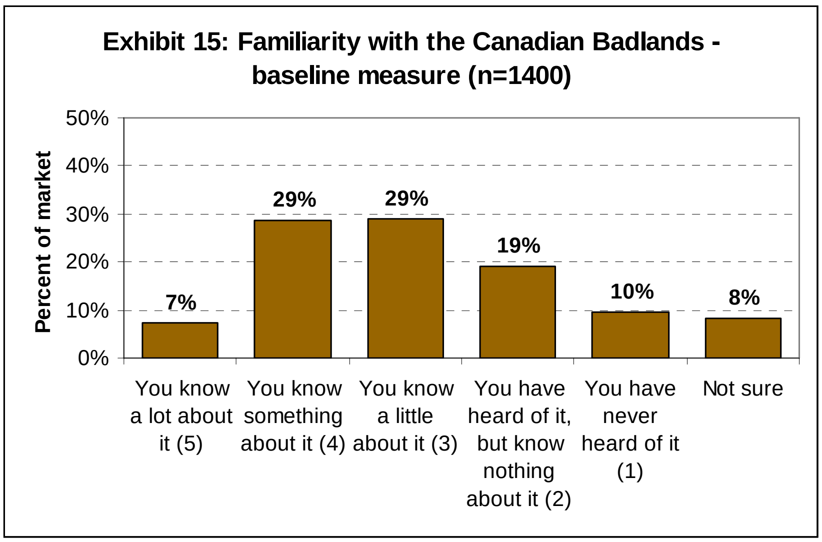
In terms of the destination clusters, Prairie Hearts used fewer sources than average and were particularly low in their use of the Internet, depending on friends and family as their primary source to a greater degree than the other clusters. The Internet was far more important to the Sun and Warmth and Peripatetic clusters. The latter also favored picking up information at a travel association and at the destination.

Perceptions of the Canadian Badlands

AWARENESS AND OPINION

Familiarity with the Canadian Badlands

Respondents were asked how familiar they were with the Canadian Badlands region. No explanation about the region was given, since the purpose was to establish baseline awareness in addition to familiarity. From the focus groups, we know that there was greater exposure to the term "badlands" alone, so the challenge is one of establishing the Canadian Badlands as having a distinct location and identity. As that becomes established, both awareness and familiarity should grow. Exhibit 15 shows the distribution of responses received.



In total, 82% thought they had heard of the Canadian Badlands,[4] though the majority had only some or a little knowledge of it and very few claimed to "know a lot" about it.

Since this is a baseline measure, and since there were people in the focus groups who were hesitant about committing because they had only heard the term "badlands" associated with the Drumheller (or another local) area, not *Canadian* Badlands, a response option of "not sure" was also offered. With effective marketing and the passage of time, this category should become redundant … and familiarity along the scale should increase as people gain knowledge about the region.

Knowledge levels were highest in Calgary and Edmonton (an average score of 3.62 and 3.41 out of 5 respectively), with Calgary having the highest proportion who "know a lot about it" (19%). Scores were much lower in centers other than Saskatoon and Regina, where they were

4. This figure is not different to the 90% of western Canadians who agreed they had heard of the Canadian Badlands in a 2004 survey for the region. The 2004 study was based on n=216 in BC, Alberta and Saskatchewan, of which 82% were Albertans on a weighted basis. Use of an equivalent three-market definition and weighting scheme for the present survey yields an identical proportion, 90%, who indicated they had heard of the region.

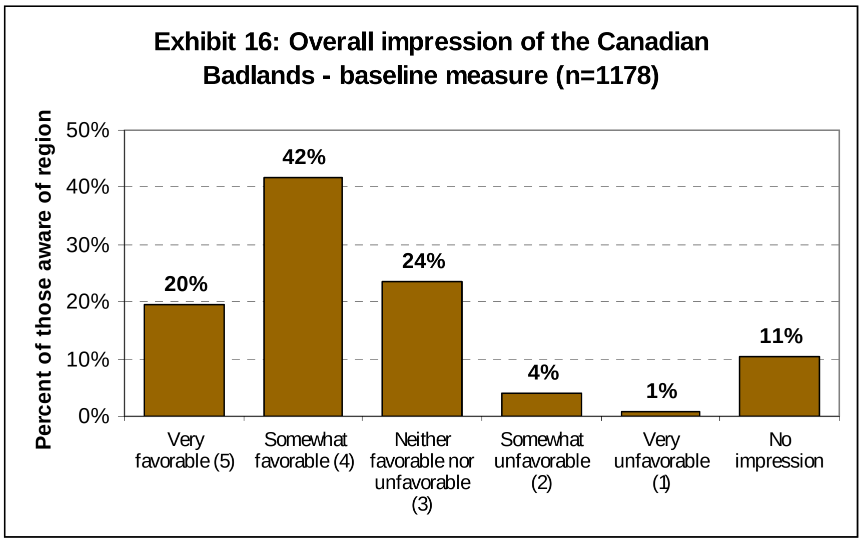
average. In Vancouver, one-third had either never heard of the Canadian Badlands or were unsure; in Winnipeg the figure was one in four and in Kamloops/Kelowna, one in five.

Higher levels of knowledge were found among empty nesters and lower awareness among pre-school families. There was increasing familiarity with increase in income and education and with increasing number of visits made to the province.

Psychographically, Urban Explorers had lower levels of awareness than the other segments, while the Peripatetic cluster scored as strongly overall as Edmonton.

Impressions of the Canadian Badlands

Respondents who were aware of the region were next asked for their overall impression of the Canadian Badlands as a place to visit for a vacation or leisure trip. As may be seen from Exhibit 16, impressions were quite positive, with an average rating of 3.84 out of 5. In total, 62% had a positive impression, with the modal response being "somewhat favorable". Very few had unfavorable perceptions, so the balance was either neutral or there was no impression at all.

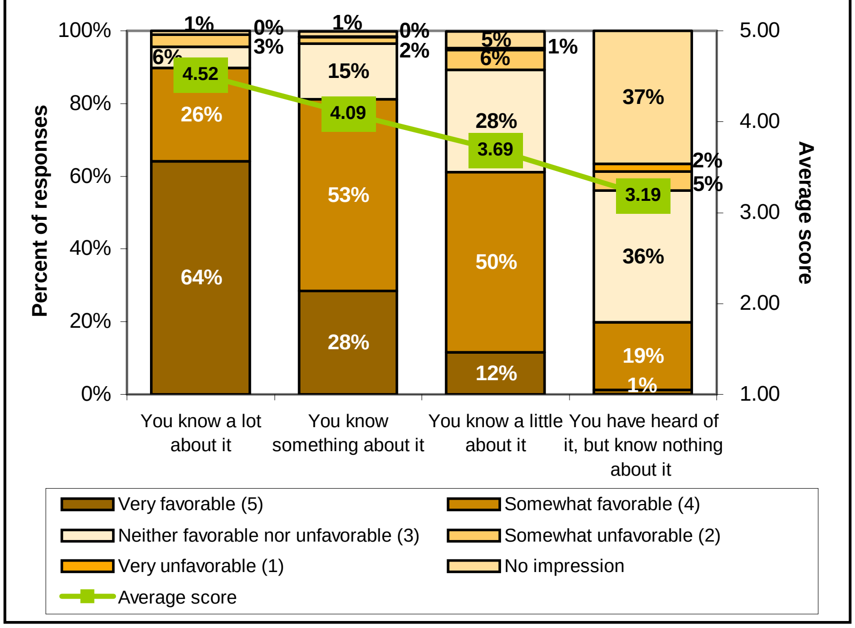


Among people who knew of the region, the most favorable overall opinions were expressed in Edmonton (4.09), followed by Calgary (3.92). Vancouverites – even those who felt they knew of the region – were most likely to say they had no impression at all (21%).

Among the other groups examined in the survey, females were modestly more positive than males, Accomplishers and Comfort Seekers slightly more favorable than Real Relaxers and Urban Explorers, and the Peripatetic, Prairie Hearts and BC Centric clusters scored slightly higher than the Sun and Warmth and the North Central clusters. However, these differences were only minor.

Non-visitors to Alberta in the past three years had less favorable opinions than visitors, though these were again neutral rather than negative.

Exhibit 17: Impression of the Canadian Badlands by familiarity with it (n=1178)



Opinions improved as knowledge of the Canadian Badlands increased (Exhibit 17), with two-thirds of those who were most knowledgeable also being most favorable toward the destination.

This is a fairly typical pattern and emphasizes the need to increase knowledgeability in the target audience, since both are linked to behavior (in this case interest in visiting the region).

EXPERIENCE

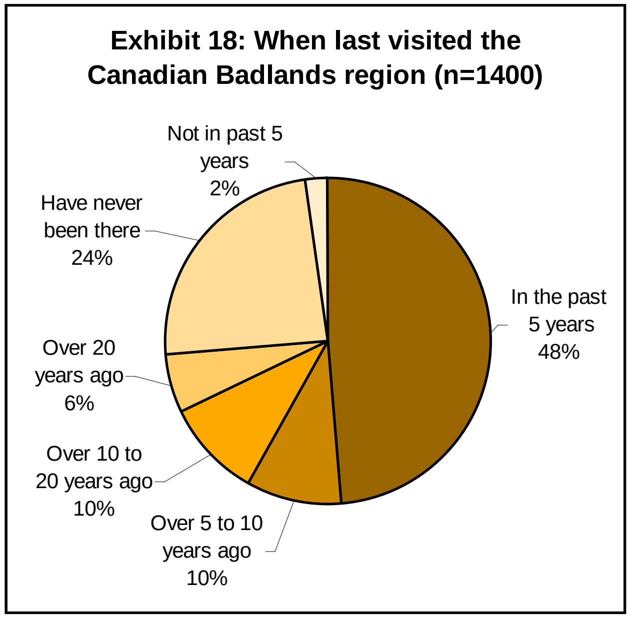
To start familiarizing survey respondents with where and what the Canadian Badlands region really is, they were shown a map of the region and read the following introduction and question:

"The Canadian Badlands has recently been defined as a new tourism region in south eastern Alberta. Please look at the map of the area and click on the names of any places (cities, towns, provincial parks, lakes or rivers) in the region that you have visited for vacation or pleasure in the past 5 years. Also click on the number of any highway or road that you traveled for vacation or pleasure in the past 5 years.

Definition: For the purpose of this question, "visited" means you stayed there overnight, stopped there for a short period, or can remember something about the place from when you drove through it on a vacation or pleasure trip."

When visited last

If they had not visited the region on the map in the past five years, respondents checked a box and continued on with the questionnaire, which included a question on when they had last visited. The distribution is shown in Exhibit 18.



In all, 48% of the market had visited the region in the past five years. 2% initially indicated they had, but marked only Calgary, and/or Highway 2 or 3 south of Calgary, on the map, which actually lie outside the current region boundaries.

One in four had never been to the region at all and the remainder had last visited over different time periods. The average time since those who had ever visited had been there was approximately 7 years.

The results by place of residence are shown in Exhibit 19. Vancouver residents were both the least likely to have ever been there and, among those who had, to have last visited longest ago. Winnipeg and Kamloops/Kelowna followed a similar pattern, though not quite as extreme.

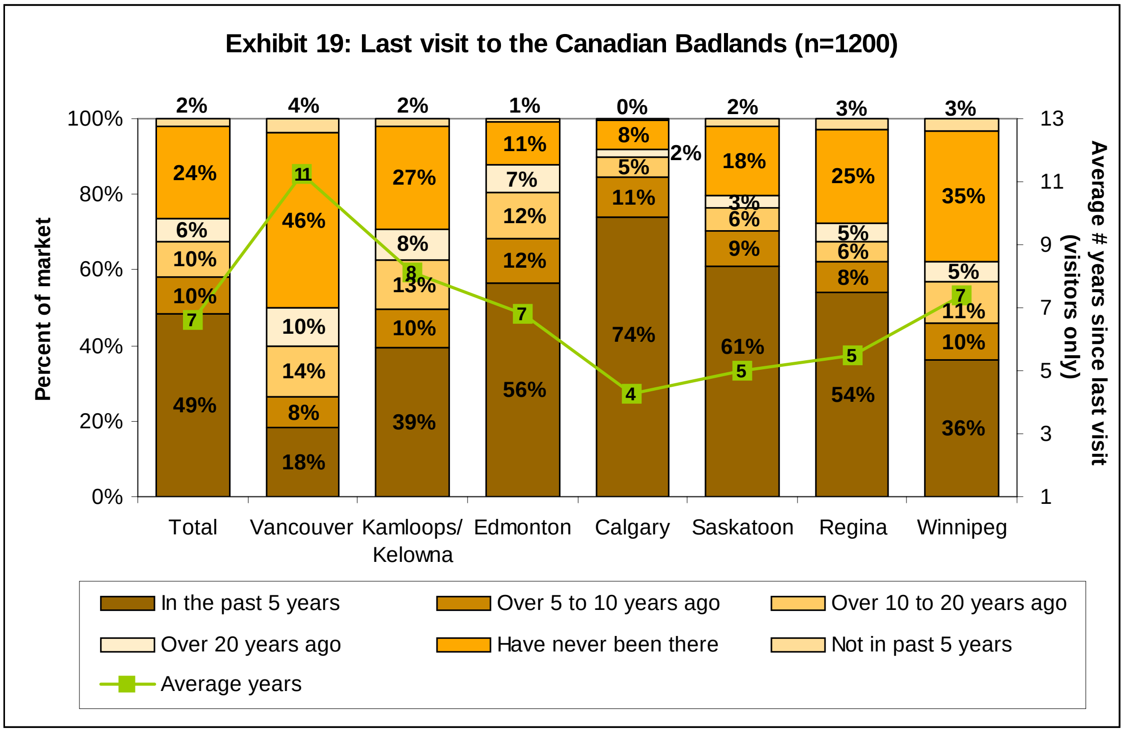
In contrast, three out of four Calgary residents had visited recently, confirming their status as the major geographic market for the region. Edmonton had the interesting pattern of having a very large proportion who had visited the Canadian Badlands in the past, but the duration since the last visit was only average.

Saskatoon and Regina residents were generally recent rather than longer term visitors when they had visited at all, but many had not.

All major lifestages in the Mature Families/Singles market had visited longer ago than Young Families. People in the highest income and education groups were more likely to have visited in the past, while those with the lowest education levels were less likely to have done so at all. Trip recency was linked to income as well, with more recent trips being found among the more affluent.

Urban Explorers and Comfort Seekers were less likely to have ever visited the region than Accomplishers and Real Relaxers, but there were no differences in terms of recency of visit and the figures were not very different to the overall average.

Among the destination clusters, the Peripatetic were most often recent visitors (69% had been there in the past five years) and only 7% had never visited – a figure even lower than Calgary's. Those seeking Sun and Warmth though, were more likely than the others not to have been to the region (36%).



People who had visited the Canadian Badlands in the past five years were both more familiar with it and had a more favorable overall opinion of it than those who had never visited. Non-visitors were neutral in their impressions – or did not have any – rather than negative, so there were evidently no major biases against the region inhibiting visitation levels. People who had visited, but not recently (an average of 14 years), were somewhat less knowledgeable about and less favorable toward the region than recent visitors, essentially suiting actions to impressions.

Highways traveled and places visited

Discussions in the focus groups suggested that Drumheller was by far the best known destination in the region and the one which visitors knew most about. It was also found that visits to the Drumheller area and other regional destinations varied from one geographic market to another, while many visitors from Saskatchewan and Manitoba appeared to simply head across the province to Calgary, without stopping for anything more than gas and food.

To investigate just how many people had recently visited Drumheller as well as the other municipalities affiliated with the Canadian Badlands region, survey respondents clicked on place names or dots on the map that they could recall visiting. They could also click on highway numbers and the names of provincial parks, rivers and lakes to show they had visited them in the past five years. The overall results for all points identified by at least 5% of visitors are shown in Exhibit 20 and on the map that follows. On average, each person marked 9.0 spots.

These figures:

- Confirm that Drumheller is by far the most popular destination within the region, having been recently visited by just over half the market;
- Point to Highway 1 and its gateway cities (Medicine Hat[5] and Calgary[6]) as the most heavily traveled corridor by visitors to the region;
- Show a significant decline after this to the tertiary level of visitation (by 21%-30%), which again includes major points of access: Lethbridge, Highway 2 (especially the section between Red Deer and Calgary), Highway 9 (especially the sections between Calgary and Drumheller) and Red Deer. The only notable place in this group that was not a major highway or major city was Brooks, which is located on the heavily traveled Highway 1;
- In addition to being access points, the major centers are frequently VFR locations; focus group responses suggest this would include Medicine Hat, Calgary, Lethbridge and Red Deer;
- The fourth level, visited by 11%-20% of the market, identifies the non-urban secondary attractions of the region. They include Dinosaur Provincial Park, Taber, Stettler, Hanna and Cypress Hills Provincial Park. Also in the fourth level were Highway 3 (especially west of Taber), Highway 56 (particularly between Drumheller and Stettler) and Highway 21;
- Several of the towns in the fifth level, visited by 5%-10%, were small towns around or en route to Drumheller (Rosedale, Beiseker, Rosebud and East Coulee) or other gateway or exit locations (Oyen, Coutts and Milk River).

5. The data for Medicine Hat and Redcliff were combined on an unduplicated basis as the dot for Redcliff may have been mistaken for Medicine Hat because of their close proximity on the map. The same was done for Lethbridge/Coalhurst and Elkwater/Cypress Hills Provincial Park. Similarly, as highway numbers were not available for each segment of every highway, the data for the segments has been combined to provide an unduplicated user total for each highway.

6. Note that Calgary is not a member of the Canadian Badlands region, but was included on the map as it is considered to be a significant gateway into the region. Anyone who visited Calgary in the data shown here also went to at least one other place or traveled on at least one highway in the region.

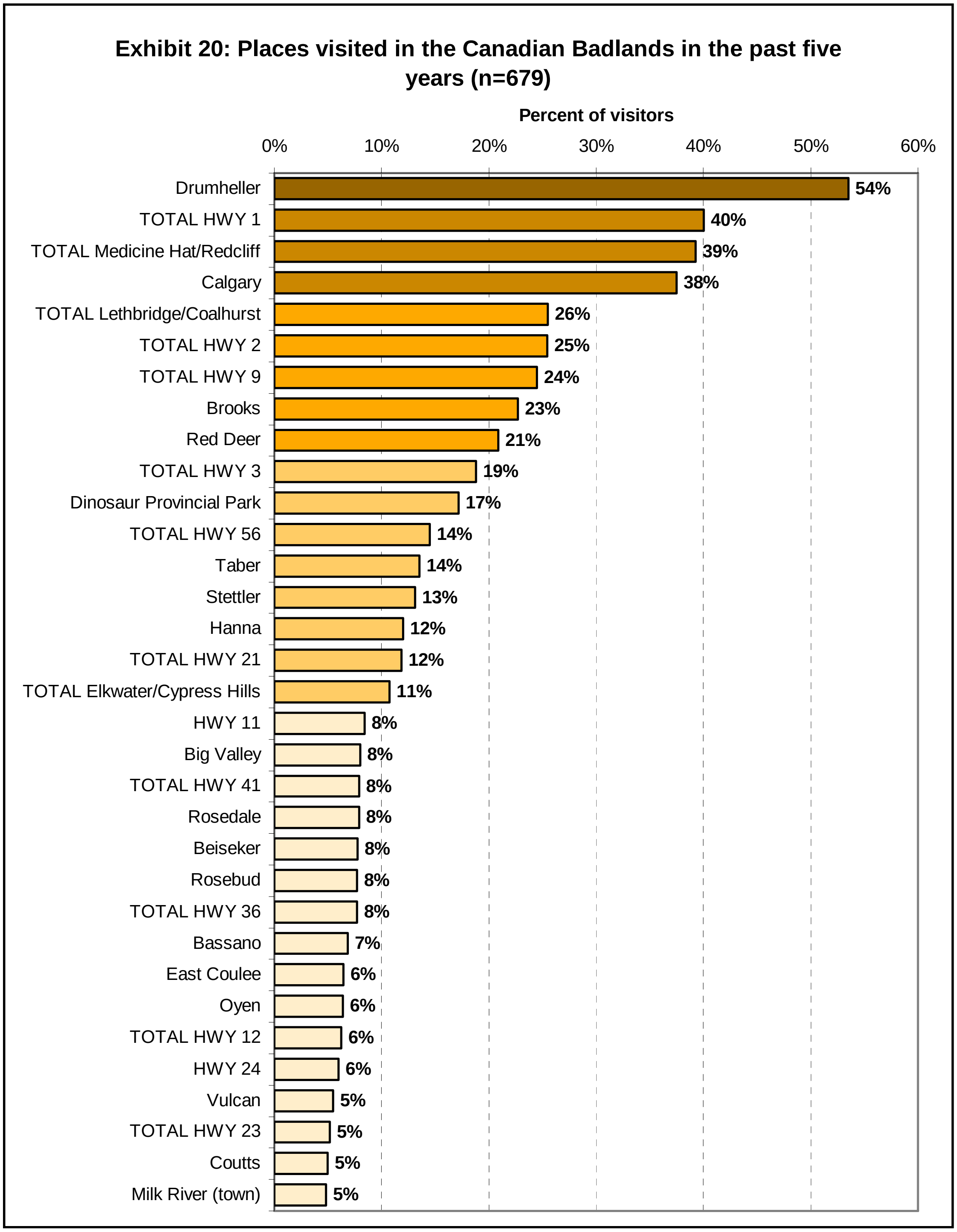


Exhibit 20: Places visited in the Canadian Badlands in the past five years (n=679)
Percent of visitors
0%
10%
20%
30%
40%
50%
60%
Drumheller
54%
TOTAL HWY 1
40%
TOTAL Medicine Hat/Redcliff
39%
Calgary
38%
TOTAL Lethbridge/Coalhurst
26%
TOTAL HWY 2
25%
TOTAL HWY 9
24%
Brooks
23%
Red Deer
21%
TOTAL HWY 3
19%
Dinosaur Provincial Park
17%
TOTAL HWY 56
14%
Taber
14%
Stettler
13%
Hanna
12%
TOTAL HWY 21
12%
TOTAL Elkwater/Cypress Hills
11%
HWY 11
8%
Big Valley
8%
TOTAL HWY 41
8%
Rosedale
8%
Beiseker
8%
Rosebud
8%
TOTAL HWY 36
8%
Bassano
7%
East Coulee
6%
Oyen
6%
TOTAL HWY 12
6%
HWY 24
6%
Vulcan
5%
TOTAL HWY 23
5%
Coutts
5%
Milk River (town)
5%

Western Canadian visitor flows through and in the Canadian Badlands in the past five years

Table 7: Main places visited and highways traveled in the Canadian Badlands by geographic market

	Total (n=679) %	Vancouver (n=37) %	Kamloops/ Kelowna (n=79) %	Edmonton (n=113) %	Calgary (n=148) %	Saskatoon (n=122) %	Regina (n=108) %	Winnipeg (n=73) %
Drumheller	54	44	56	61	69*	59	32**	35**
HWY 1	40	42	42	23**	36**	32	59*	55*
Medicine Hat/Redcliff	39	31	27	27	34	27	70*	61*
Calgary	38	42	49*	38	16**	35**	53*	48
Lethbridge/Coalhurst	26	24	24	25	31	13**	35	24
HWY 2	25	26	26	42*	30	16**	16**	19
HWY 9	24	18	21	13	34*	50*	7**	11
Brooks	23	32*	16**	17**	28*	10**	32*	32*
Red Deer	21	11	25	35*	23	14	13**	19
HWY 3	19	37*	16	14	17	15	30*	14
Dinosaur Provincial Park	17	25*	18	20	24*	9**	11**	17
HWY 56	14	12	15	29*	13	10	9	12
Taber	14	28*	14	12	13	9**	19*	8**
Stettler	13	13	13	25*	17*	11	4**	6**
Hanna	12	5	14	14	12	22*	5**	5
HWY 21	12	6	11	21*	14*	16*	5**	2**
Elkwater/Cypress Hills	11	5	5	8	12	11	21*	6
HWY 11	8	5	4**	16*	12*	5**	4**	10
Big Valley	8	8	7	18*	13*	3**	1**	2**
HWY 41	8	3	5	7	7	12*	12*	3**
Rosedale	8	10	7	16*	10*	2**	2**	11
Beiseker	8	2	9	5	19*	8	-	2
Rosebud	8	4	9*	13*	17*	3**	-	-
HWY 36	8	12	4	10	8	10	6	4
Bassano	7	12	4	4	10	2**	15*	4
East Coulee	6	2	10*	13*	7	2**	2**	9*
Oyen	6	-	8	2	7	18*	3	-
HWY 12	6	5	-	12*	5	7	4**	11
HWY 24	6	14*	4	10*	9*	2**	1**	7
Vulcan	5	2	4	10	13*	1**	-	3
HWY 23	5	9*	-	9*	13*	1**	-	2**
Coutts	5	-	2**	9*	9*	2	5	-
Milk River (town)	5	3	1**	9*	8	2**	4	2
Average number of spots identified	**9.0**	**8.8**	**8.1**	**9.7**	**10.4**	**8.2**	**8.9**	**7.9**

* Significantly higher than other markets ** Significantly lower than other markets

Table 7 compares responses by visitor origin. It clearly demonstrates that where one lives influences how one approaches and travels through and in the region.

- Drumheller had the highest incidence of visitation by Calgary residents … and much less by people living in Regina and Winnipeg. In fact, Drumheller was the most frequent destination in the Canadian Badlands for all visitors except from those two cities.
- For both Regina and Winnipeg, Medicine Hat was mentioned at approximately double the rate of Drumheller, along with higher mentions of Highway 1 and Calgary, while Brooks was visited at the same rate as Drumheller.
- Regina residents had the highest incidence of visitors to Walsh (11%) and Cypress Hills Provincial Park and made above average use of its access road, Highway 41 south of Medicine Hat. A popular second route was also evident, following Highway 3, including Lethbridge and Taber.
- Aside from visits to the extreme southeast corner of the region, Regina visitors were much less likely to leave the major highways to use side roads like Highway 23 and 24, or northern roads like Highway 11 and 12. Similarly, they were below average visitors to Dinosaur Provincial Park, Stettler, Big Valley, Hanna, Rosedale, East Coulee, Rosebud and Highway 2 and Red Deer.
- In other words, if they go beyond Medicine Hat, the routes followed by Regina and Winnipeg residents through the Canadian Badlands tend to be the major east-west highways in the southern portion of the region.
- Saskatoon residents stood out for their use of Highway 9 as the access gateway to the region, with Hanna and Oyen being the major centers on that route. While Calgary was a below average destination for Saskatoon visitors, a relatively high proportion used Highway 21 (southern portion) and also the central portions of Highway 41.
- Although they were average in visiting Drumheller, Saskatoon visitors were below average in mentioning surrounding areas like Highway 11 and Big Valley, Rosedale, East Coulee and Rosebud, Brooks and Dinosaur Provincial Park. Their use of Highway 2 (all sections), Highway 24, 23 and Vulcan, and visits to the more southerly points of Lethbridge, Taber and Milk River were also below average.
- From the BC side, Drumheller was the most popular destination in the region, with Calgary and Highway 1 being mentioned next most often. Among Vancouverites, Brooks and Dinosaur Provincial Park, Highways 3, 23 and 24, and Taber were mentioned more often.
- In comparison to the other cities, Calgary residents had a high incidence of visiting many locations in the region, especially those near Drumheller (Beiseker, Rosebud, Stettler, Big Valley, Rosedale and Carbon at 8%) as well as Brooks and Dinosaur Provincial Park, and to the south, Vulcan, Coutts, Writing-on-Stone Provincial Park (6%) and Highway 4 (8%).
- Edmontonians were the strongest users of Highway 2, especially between Red Deer and Calgary, along with other north-south routes like Highway 56 (north of Drumheller) and Highway 21. Access also occurred through Red Deer as the gateway, using Highway 11 and 12. Their activities tended to be centered in the northern part of the region, in Drumheller and surrounding towns – Stettler, Big Valley, Rosedale, Rosebud and East Coulee, though

they were also overrepresented among Coutts and Milk River visitors and on Highway 4 (8%). They were strongly underrepresented on Highway 1 and in visiting Brooks.

Besides location, there were demographic differences of note.

- Men were more likely than women to identify the roads they traveled on; this was true for virtually every highway and highway segment individually, with the differences being significant on many major routes (Highways 1, 3, 11, 21, 36). Since most of the market travel as families or couples, one would not expect such differences, so highway use is probably underreported by women. If men do more driving, this may account for the difference as drivers tend to be more aware of their routes. The finding helps to explain why some centers had higher visit percentages than the access roads that must be used to reach them (e.g., Highway 41 at 8% and Cypress Hills Provincial Park at 11%);
- There were a few destinations that were mentioned significantly more often by Mature Families/Singles than Young Families: Medicine Hat, Highway 3, Taber and Warner in the south, Youngstown, Hanna, Rosebud and Bassano in the north. Rosebud in particular was visited increasingly with progressively older lifestage, from 4% among pre-school families to 12% among older singles/groups. On the whole, Mature Families/Singles identified having visited more spots in the region than Young Families (9.7 vs. 8.2);
- Families with children aged 6-12 visited fewer locations and traveled on fewer highways than families with either younger or older children (7.7 vs. 8.5 for pre-school families, 9.1 for teen families and 10.5 for grown families). In the focus groups, it was evident that parents needed to minimize the amount of travel time and maximize the number of things for their children to do while away on a trip. These results suggest that elementary school-age children may be the key focus for such needs. One of the child-friendly activities for this age group may be the Alberta Prairie Railway, since Stettler was significantly more likely to have been visited by this lifestage (18%);
- The number of places visited varied by income and to some degree by education, from 7.6 to 10.4 as income increased, and 8.3 to 10.0 for education, so income constraints affect travel at the regional level too. Places visited that were significantly impacted included Drumheller, which had been visited by fewer in the lowest income group (42%) and Rosebud, Rosedale and Irricana which were visited more often by the highest income group;[7]
- Increasingly favorable overall attitudes to the Canadian Badlands were found among visitors to the following locations: Drumheller, Brooks, Dinosaur Provincial Park, Stettler, Cypress Hills Provincial Park, Rosedale, East Coulee, Rosebud, Vulcan, and to a lesser degree Carbon, Wayne, Dry Island Buffalo Jump Provincial Park and Writing-on-Stone Provincial Park. Overall perceptions of the Canadian Badlands were either not impacted by visits to

7. We wonder whether there was confusion between Rosebud and Rosedale, since there seems to be no reason for an income differential in Rosedale.

the major centers in the region (Lethbridge, Red Deer) or were affected somewhat negatively, with increasingly unfavorable attitudes being expressed by visitors to Calgary and Medicine Hat. This pattern suggests that the rural parts of the region are what set it apart and are most satisfying to visitors;

- The highways traveled in the Canadian Badlands did not affect the extent to which visitors expressed favorable attitudes, but they did affect familiarity. As travel off the major highways increased, increasing familiarity with the region was expressed. Highways showing this pattern were 9, 56, 21, 36, 41 and 23. It would appear that visitors feel they need to get off the major through routes to get to know the region.

In terms of traveler segments, there were relatively few differences between the segments and none that seemed to tell a story.

- Accomplishers were found slightly more often using Highway 41 south of Medicine Hat and visiting Walsh, Empress, Brooks, Cluny and Delia; they were less likely to use Highway 2, 4, 9, 11 and 21.
- Comfort Seekers indicated visiting Rosebud and Gleichen more often than the other segments;
- Real Relaxers mentioned Dinosaur Provincial Park, Hanna, Vulcan and Carbon, as well as Highway 9 and 11 at a higher rate;
- Urban Explorers named fewer spots than the other segments (8.0) and were especially low in visiting Dry Island Buffalo Jump Provincial Park and Dinosaur Provincial Park and many of the small towns in the region (e.g., Acme, Beiseker, Irricana).

The destination clusters were only somewhat more distinctive, with Peripatetics having visited more places than average (11.0) and Prairie Hearts mentioning fewer (6.9). Peripatetics were especially overrepresented in the southern part of the region, using Highways 1, 2, 3 and 41 at a higher rate and mentioning Medicine Hat, Lethbridge, Taber and Coutts more often – a pattern that could indicate their experience of the region was gained en route elsewhere, especially to the US. Sun and Warmth cluster members were found more often on Highway 2 and 4 and likely had similar intentions, since visit levels were directionally higher for Lethbridge, Milk River and Coutts as well.

Prairie Hearts were found more often than other clusters on Highway 9 east of Hanna, were low users of Highway 3 and less often visitors to Lethbridge and Medicine Hat. BC Centric were less likely to visit Calgary (many being Calgarians themselves) and Medicine Hat.

The North Central cluster essentially confined their trips through the region to Highway 1 and its major centers, Medicine Hat, Calgary, Brooks and to a lesser degree Bassano and Walsh, occasionally with a side trip to Cypress Hills Provincial Park. They were the least likely to use Highway 9 or to visit Drumheller.

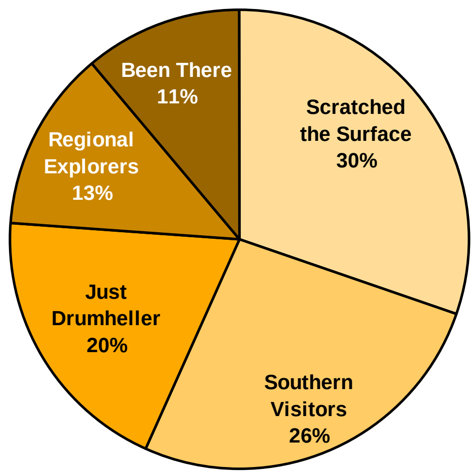
Travel patterns within the Canadian Badlands

A special cluster analysis of the highways and places visited in the region provided a little more insight into travel patterns in the region. Five clusters were identified, as shown in Exhibit 21.

- The largest group of visitors has barely **Scratched the Surface** of what the region has to offer. On average they marked 3.0 places on the map, with the greatest number indicating they had visited Drumheller (58%), Calgary (33%) and Medicine Hat (16%), followed by 14% who traveled on Highway 1 and 12% on Highway 2. With the exception of Drumheller and Calgary which were visited at average rates, the remaining locations were all visited significantly below the rates of the other clusters.

  There were many apparent reasons for this. The cluster was somewhat overrepresented among:

Exhibit 21: Canadian Badlands travel clusters (n=679)



  - Females (60%) who were less likely to report highways traveled;
  - Young Families (50%) who may limit the distances they travel and number of stops they make;
  - The lowest income group (29%) who are constrained in the amount of travel they do; and
  - People with above average interest in city destinations (56%) and Urban Explorers (42%).

  This cluster also traveled to fewer destinations elsewhere in the past three years and was especially low in visiting Central Canada, the US Pacific, Mountain and West North Central regions or Florida. Not surprisingly, they were underrepresented in the Peripatetic and overrepresented among the BC Centric and Prairie Hearts clusters.

  They made the fewest visits to Alberta, being especially likely to have visited only once in the past three years (28%). They were more likely than other visitors to the Canadian Badlands to have responded that they had never heard of the name or to know anything beyond the name, with average familiarity scores at general population levels, despite having been to the region.

- The next largest visitor group had been a little further afield in the region, but tended to stay in the south, hence their name **Southern Visitors**. On average they marked 7.9 spots on the map, and were particularly overrepresented in visiting Medicine Hat (71% – almost double the average) and traveling on Highway 1 (63%) and Highway 3 (27%). However, very few had been to Drumheller (18%, compared to the general average of 54%) or any of the smaller northern towns (e.g., Stettler, Oyen, Rosebud).

  This cluster was not demographically different from average except in terms of location. 37% lived in Regina, more than 2.5 times the rate at which the Regina market is represented in the sample. 17% were from Winnipeg and 13% from Saskatoon, so this is essentially a cluster comprised of regional visitors from east of the province.

  Cluster members were somewhat more interested in doing things they had never done before, in looking for excitement rather than peace and quiet and in strengthening family bonds. Accomplishers were found more often in this cluster than any other (26%), while Real Relaxers and Comfort Seekers were underrepresented.

  Given their places of residence, it is not surprising that Southern Visitors were more likely to travel to and in Manitoba and Saskatchewan and less in BC. They also favored the US West North Central at an above average rate, and were overrepresented in the North Central and Peripatetic destination clusters.

  They used privately owned cottages/cabins rather than rentals and were less likely to use an RV Park or B&B accommodation. They consulted a lower than average variety of information sources. They also took the fewest trips to Alberta in the past three years of any cluster, with Alberta Central and Alberta North being visited less and Calgary and Area more than average.

  Like the Scratched the Surface cluster, they had relatively low familiarity with the Canadian Badlands, even though they had visited of it.

- One-fifth of Canadian Badlands visitors belong to the **Just Drumheller** cluster. This group was slightly overrepresented in visiting Drumheller (67%), but other than a high level of travel on surrounding roads (Highway 9 – 70%, Highway 2 – 44%, Highway 56 – 29%, Highway 11 – 16%), destinations other than Stettler (24%) were visited at or below average rates. The Just Drumheller cluster were rarely visitors to any southern destinations in the region (e.g., Medicine Hat, Lethbridge, Cypress Hills Provincial Park) or even to locations closer to Drumheller (e.g., East Coulee, Dinosaur Provincial Park, Brooks) or places in and around Calgary.

  The major distinguishing characteristic of the cluster was geographic. 33% were from Saskatoon, more than double their rate in the sample, and it included an above average component of Albertans (44%).

Members of this cluster were somewhat less likely to want to do things they had never done before and were more often interested in strengthening family bonds, but resembled the general population profile in terms of traveler segments.

Their general travel patterns were distinctive for a high incidence and frequency of visits to Alberta, where they were above average in visiting Alberta's three rural regions. They were also more likely to visit Nova Scotia and the US Mountain (especially Nevada) region. They were overrepresented in the Prairie Hearts and Peripatetic destination clusters.

Just Drumheller visitors were above average occasional resort users and somewhat more likely to gather information at consumer shows. They claimed fairly high familiarity with the Canadian Badlands, but only average favorability.

- The two clusters with much greater exposure across the full Canadian Badlands region were also much smaller than those with more limited experience. The first of these had visited throughout the region and was termed **Regional Explorers**. They were the most likely of all to have been to Drumheller (84%), but were also overrepresented in visiting all the provincial parks – Dinosaur Provincial Park (58%), Cypress Hills Provincial Park (22%), Dry Island Buffalo Jump Provincial Park (15%) and Writing-on-Stone Provincial Park (11%).

  The distribution of the parks throughout the region was associated with a higher incidence of visiting places near them, both in the north and the south. For example, Red Deer (34%), Stettler (30%), Consort (13%), Big Valley (26%), East Coulee (32%), Hanna (30%), Youngstown (14%), Rosebud (27%), Rosedale (25%), Beiseker (24%), Carbon (12%) and Wayne (12%) were all visited at an above average rate. In the south cluster members had done the same in visiting Brooks (59%), Bassano (12%), Medicine Hat (59%), Lethbridge (42%), Taber (32%), Vulcan (14%), Milk River (14%), Warner (11%) and Coutts (10%).

  However, given the fact that more people in this cluster had visited towns close to the provincial parks than the other way around, it is likely that the parks were part of their "tour" of the region rather than the focus of their trips.

  Demographically, this cluster included an above average proportion of Mature Families/Singles and especially older singles. They had a particularly strong preference for tranquil rural destinations and an interest in strengthening family bonds, with the result that they were underrepresented among Urban Explorers (24%) and overrepresented among Real Relaxers (29%).

  In terms of their general travel, they were overrepresented in the BC Centric destination cluster and had visited the Yukon at an above average rate. Travel in Alberta was especially likely to occur May through August and was less likely to involve couples traveling with friends. Alberta's rural regions were overrepresented as destinations in the province, especially Alberta South. This cluster was somewhat more likely to be campers (particularly RV campers) and B&B users. They were relatively heavy users of travel/auto associations and the Internet as secondary sources of information, resembling the population distribution on their primary source.

Perhaps not surprisingly, those who were in the Regional Explorers cluster felt they were the most familiar with the Canadian Badlands, with fully 28% claiming to "know a lot about it" (average 4.04), while the highest proportion, 51%, held a "very favorable" opinion of it (average 4.38).

- The final cluster, named **Been There**, was distinctive for the sheer number of places visited. Compared to the Regional Explorers, who marked an average of 12.0 places on the map, Been There cluster members identified 24.7 locations they had visited or roads they had traveled. One of the big differences was that Been There members marked a large number of highways, something that was not done by Regional Explorers, who evidently were less concerned with their routes than their destinations.

  As a result, the Been There cluster had traveled on almost every road on the map at a rate far in excess of everyone else, but was often exceeded in its incidence of visiting towns by Regional Explorers. Examples of this are the very high rates of use of the north-south Highways 2 (67%), 21 (46%), 56 (46%), 36 (41%), 41 (34%), 24 and 23 (24% and 22% respectively) and 4 (22%); and east-west Highways 1 (84%), 3 (70%), 9 (63%), 11 and 12 (32% and 28% respectively).

  Nevertheless, Been There members were also above average in their visits to places across the south in particular, like Medicine Hat (62%), Lethbridge (56%), Taber (48%), Brooks (35%), Coutts (23%), Cypress Hills Provincial Park (21%), Bassano (19%), Vulcan (19%), Milk River (18%), Vauxhall (13%) and Warner (12%).

  While 66% had visited Drumheller, this was only slightly above average, but they were overrepresented across the north in visiting Red Deer (32%), Hanna (27%), Dinosaur Provincial Park (26%), Rosedale (25%), Rosebud (20%), East Coulee (16%), Beiseker (16%) and Acme (12%).

  From a demographic perspective, the Been There cluster included the highest proportion of males (partly explaining the heavy identification of highways traveled) and virtually all members were married or lived common law (96%). Many were empty nesters (45%). They had the highest average income of all the Canadian Badlands destination clusters. Just like the Regional Explorers, they were overrepresented among Real Relaxers and underrepresented among Urban Explorers, expressing a strong preference for rural destinations and an above average interest in peace and quiet.

  Given their pattern of travel in the Canadian Badlands, it is not unexpected that the Been There cluster included the highest proportion of Peripatetics (31%) while Prairie Hearts members were underrepresented (7%). Their North American destinations showed a high incidence of travel to BC, Saskatchewan, the US Mountain, Pacific and West North Central regions and Florida. They took frequent trips to Alberta, were especially likely to visit Alberta South and were underrepresented in visiting Calgary and area.

  This cluster traveled in all months of the year at a higher rate than the other Canadian Badlands clusters and that was true for their travel in Alberta as well. They were more likely to take longer trips, including trips of one to two weeks and over two weeks in length and, on a directional basis, were less likely to take weekend trips as their most frequent type.

The most common travel party was a couple, and couples traveling with friends were a strong occasional option. Use of private cottages/cabins as the most frequent form of accommodation was higher than average, but the chance of staying in the homes of friends and relatives was well below that of all the other clusters. Frequently mentioned secondary types of accommodation were homes of friends/relatives, budget hotels/motels and rented cottages/cabins.

This cluster was the heaviest user of travel associations as a primary source of information and less likely to look for advice from friends and relatives. Other supporting sources were their own experience, the Internet, tourism destination bureaus and tourism information centers, information from local tourism properties, billboards/roadside signage, books and the media … pretty much everything and anything they could lay their hands on.

While not rating themselves quite as familiar with the Canadian Badlands as Regional Explorers, the Been There cluster included a high proportion who knew a lot about it and were the second most favorable in their overall opinion of the region.

Impressions of the Canadian Badlands

Overall results

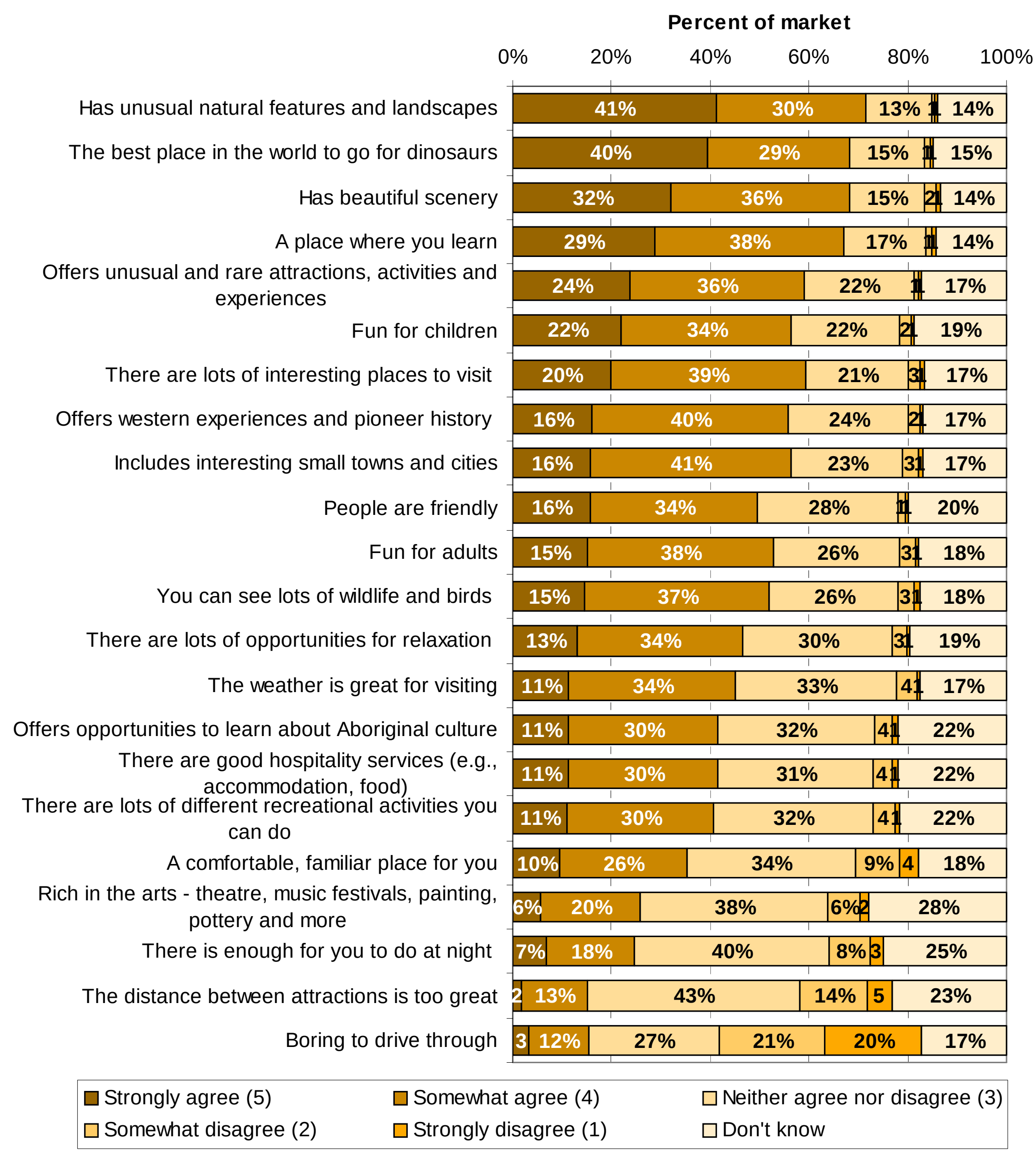
Based on focus group perceptions of the Canadian Badlands as a place to visit on a vacation or pleasure trip, a series of statements about the region was developed. Respondents were asked to what extent they agreed or disagreed with each one. Since the question was also asked of non-visitors in order to identify their impressions (along with potential perceptual facilitators and barriers), a "don't know" response was permitted. At this point in the survey respondents had seen the map and knew what area and locations the region covered.

The overall findings are shown in Exhibit 22. On average, 17% of the respondents felt they did not have any impressions of the region. The percentage varied from one item to another, from a minimum of 14% to a maximum of 28%. This means that the vast majority of people have at least some impression of the region that could influence their visitation behavior.

There were two key features and four supporting descriptions that define and differentiate the region. Most important were the defining images:

- That it is known or expected to have **unusual natural features and landscapes**; and
- That it is **the best place in the world to go for dinosaurs**.

Exhibit 22: Perceptions of the Canadian Badlands (n=1400)



The supporting descriptions expand on just what this means to the market:

- **It has beautiful scenery**, which is a statement of values associated with those unusual landforms and landscapes;
- **It is a place where you learn**. Based on focus group responses, this perception is the outcome of the education in dinosaurs offered in the region (at the Royal Tyrrell Museum of Palaeontology and Dinosaur Provincial Park in particular), of learning about the nature of

the badlands and the presence of many historic features and sites. This perception can also be a two-edged sword, as there are people who feel that learning and vacation are polar opposites, or that a little learning goes a long way while on a leisure trip;

- **Offers unusual and rare attractions, activities and experiences**. This response again reflects on the two key features, but adds the fact that there is strong awareness of the rarity (at least in Canada) or even uniqueness of the tourism opportunities offered by the region. It was also fairly strongly correlated with the opportunity to learn;
- **Fun for children**. Based on focus group discussions, dinosaurs are an enduring child favorite and appeared to be a primary reason for visiting the region. Given the position of Drumheller as the primary regional destination, the survey suggests that this is true. In the focus groups there was some criticism of the promotional materials tested for not being sufficiently child-orientated, though there was also awareness of other child friendly activities in Drumheller. The different views led to the inclusion this statement and the findings here support a prevailing view of the region's key attractions as something that children enjoy. The term "fun" was also deliberately chosen, as "fun" is strongly associated with the very best memories of pleasure trips. As a result, being fun for children is an important perceptual dimension.

  A counterpart to being seen as fun for children is that the region may be perceived as not **fun for adults**, a key issue when targeting the Mature Families/Singles segment, many of whom were empty nesters or older singles/groups, and many of whom travel as couples or with other adults. In the focus groups there was denial that this was a region only for children, as adults have fun too, but that co-existed with a view that part of the enjoyment was in seeing children and grandchildren enjoying themselves or being exposed to something for the first time. Tied to this was a concern that a fair number of people who attended the focus groups had not visited for many many years (confirmed in the survey), with latent interest being expressed, but no driving reason being found to return.

  The survey results indicate that while the majority of the market saw the region as fun for adults, the strength of the perception was lower than for being fun for children (15% "strongly" agree for adults, 22% for children) – essentially the same mixed view heard in the focus groups. This affirms that being fun for children is not a barrier to also being fun for adults, but it also points to a somewhat stronger perception of the region as being for children.

The remaining perceptual statements tested can be viewed in four groups:

- **There are lots of interesting places to visit**. Another value statement, it encompassed many of the other regional attractions that were rated positively by the majority of respondents. These included:
  - Offers western experiences and pioneer history;
  - Includes interesting small towns and cities; and

- You can see lots of wildlife and birds.

  Having lots of interesting places to visit was especially important to people who also agreed that the region is fun for adults.

- While there were no attractions in the region that were generally perceived negatively, a number were **predominantly neutral**, with most respondents neither agreeing nor disagreeing with them or having no opinion. They are aspects of what the region offers that at best are less well known, at worst could act as a disincentive because the resources are not known to be there. They included:
  - There are lots of opportunities for relaxation (as opposed to learning);
  - Offers opportunities to learn about aboriginal culture. Perceptions here were most strongly linked to perceptions of the availability of western experiences and pioneer history;
  - There are lots of different recreational activities you can do (allied with relaxation and also as opposed to education; also allied to perceptions of the region as offering fun for adults);
  - Rich in the arts – theatre, music festivals, painting, pottery and more. The arts received the highest "don't know" response, partly as a function of low interest and knowledge of the subject matter, partly because knowledge of the resource is low;
  - There is enough for you to do at night.
- The next set of statements, with one exception, was also regarded in a predominantly neutral light, indicating that they do not stand out as a particular asset of the region. They all had to do with **hospitality** in a very broad sense:
  - People are friendly – friendliness of the locals was the exception here, with 50% rating it positively, though there was little "strong" agreement. To some degree, friendliness is associated with western and small town experiences;
  - The weather is great for visiting. Given some strong views of the heat expressed in the focus groups, both by those who had been there and by images of the badlands, this result is actually a quite positive finding;
  - There are good hospitality services (e.g., accommodation, food). Perceptions of hospitality services were correlated with perceptions of the friendliness of people in the region;
  - The distance between attractions is too great. A prevailing concern in the Ontario/Quebec market that has influenced the approach to marketing this large region, action to reduce the apparent distances involved has been taken by development of driving tours that engage visitors in what they can see and do along their route. The touring routes prepared for this purpose were tested earlier and the focus group report contains a thorough analysis of the findings. The survey results indicate that only 15% of the western Canadian market is concerned about the

distances involved, so it becomes understandable why the tours were perceived by them primarily as tools to learn more about the region;

- Boring to drive through. Another view expressed in the focus groups, this measure of the barrier such a view might present is reassuring in that the largest response was neutral (44%) and the next largest showed extensive disagreement (41%). However, for the 15% who did agree, it appeared to be an important barrier and was associated with perceptions of long distances, a lack of scenic merit or interesting places to visit, making it a more important barrier than distance alone. In the focus groups, more than one person with such perceptions found themselves re-evaluating their views after seeing and hearing the materials presented, suggesting that if knowledge of what is on offer can be raised, this barrier can be mitigated to some degree.

- ***A comfortable, familiar place for you***. Many people are motivated to return to the same place again and again for at least some of their pleasure trips because of their familiarity with the destination, foreknowledge of what it will be like and ease of navigation around it. As a new region, it will be useful to track whether this sense of comfort increases over time (35% agreed on this baseline measure). At the same time, focus group discussions revealed there were some people who thought they would be completely out of their element visiting badlands, and the size of this group was measured at 13% of the market.

  This dimension was associated with a cluster of other statements pointing to the importance of hospitality services and the friendliness of locals, the variety of places to see and activities to do, the opportunity to relax and to have fun as an adult.

Because there appeared to be underlying relationships between the various image statements, a factor analysis was run. It revealed the presence of three basic components within the twenty-two dimensions evaluated, as shown in Table 8. People who rated one of the statements within a component high tended to also rate the others high (or vice-versa, tending to rate both low), suggesting that a core concept or commonality was measured by each component.

The first of the components centered on the amount and variety of activities and the quality of hospitality services available. It paints a picture of the types of things adults are interested in experiencing when on a vacation or leisure trip in the region. The higher the loading (correlation value), the more important these are in describing this component.

The second component separates out the distinctive features of the region and is especially interesting because they appear to line up with being fun for children more than for adults.

The final component includes the two dimensions related to driving through the region. They stand on their own and are negatively weighted, indicating disagreement with them.

Table 8: Image components of the Canadian Badlands*

	1 Activities & Services	2 Distinctive Features	3 The Drive
There is enough for you to do at night	.767		
There are good hospitality services (e.g., accommodation, food)	.719		
There are lots of different recreational activities you can do	.712		
There are lots of opportunities for relaxation	.712		
Rich in the arts-theatre, music festivals, painting, pottery and more	.704		
Includes interesting small towns and cities	.622		
There are lots of interesting places to visit	.567	.514	
Fun for adults	.544	.525	
You can see lots of wildlife and birds	.536		
A comfortable, familiar place for you	.535		
Offers opportunities to learn about Aboriginal culture	.503		
The weather is great for visiting	.501		
Has unusual natural features and landscapes		.829	
A place where you learn		.802	
The best place in the world to go for dinosaurs		.758	
Offers unusual and rare attractions, activities and experiences		.726	
Fun for children		.621	
Has beautiful scenery		.601	
Offers western experiences and pioneer history		.562	
People are friendly		.510	
Boring to drive through			-.806
The distance between attractions is too great			-.802

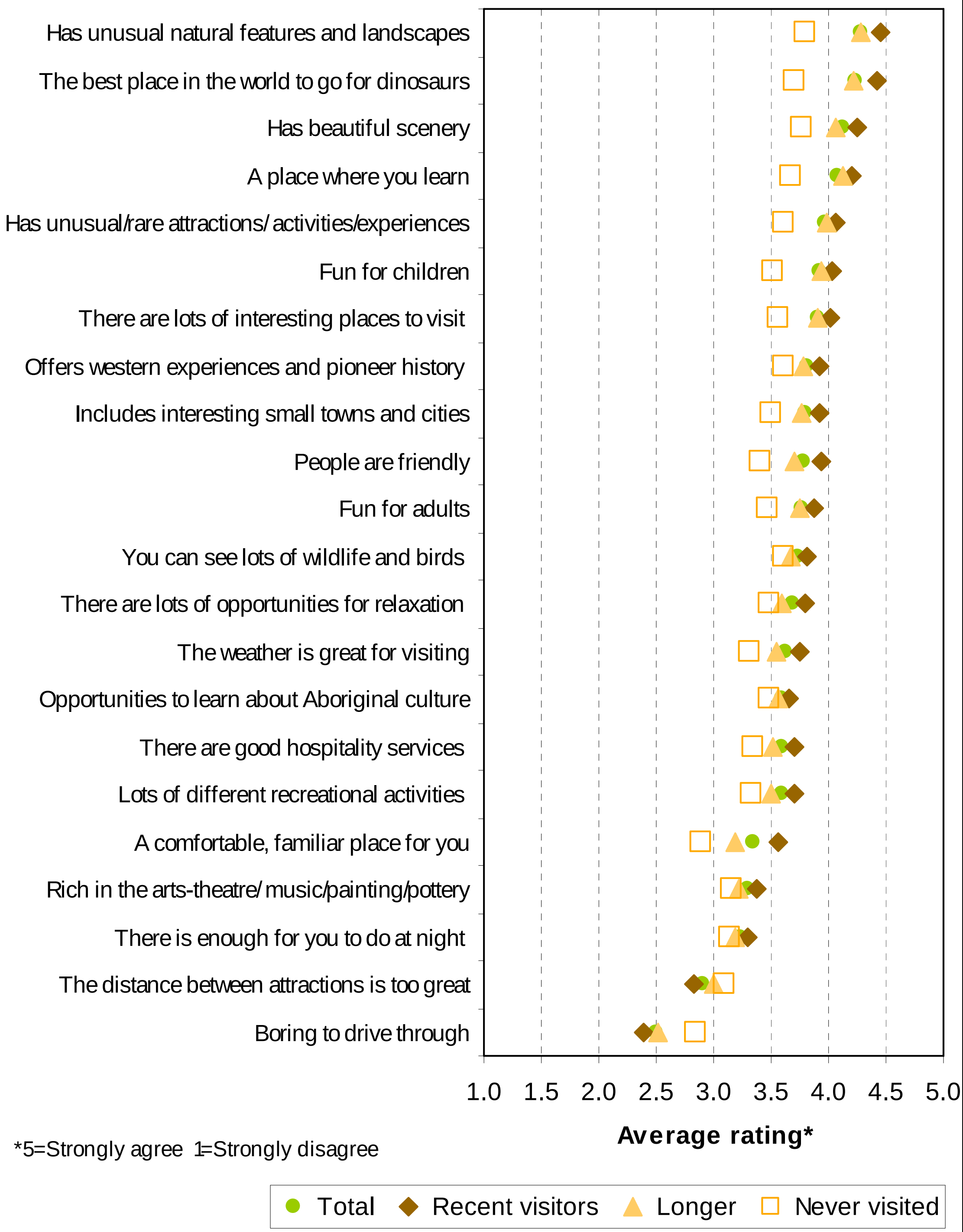
*Only loadings of 0.500 or higher are shown.
Extraction Method: Principal Component Analysis.
Rotation Method: Varimax with Kaiser Normalization.

Differences between different groups

Exhibit 23 looks at the data using average ratings and compares the responses of more with less recent visitors and non-visitors:

- In general, people who had never been to the Canadian Badlands but had impressions of it, were significantly less positive on everything about the region than those who had visited. The sole exception was that nightlife was rated similarly by all three groups;
- The three largest perceptual differences included the two defining regional attributes (dinosaurs and landscapes), suggesting either that lack of awareness of the presence of these distinctive features may be part of the reason for non-visitors not having been to the region, or that they were truly not considered so great;
- One of the strongest differentiators between the three groups was in feeling comfortable and familiar with the region. It makes sense that non-visitors who had not been there before would be less comfortable or familiar with it. However, for less recent visitors, this could point to a reason for their not having returned, or it may simply reflect the amount of time that had elapsed since their last visit;

Exhibit 23: Perceptions of the Canadian Badlands by when last visited (n=Total rating each item)



- Other potential reasons for non-repeat visits (or facilitators for more recent visitors) include: awareness that one can see wildlife and birds, knowledge or experience of opportunities for relaxation and awareness of the richness of the arts in the region. In each of these cases, recent visitors were significantly more positive than both less recent and non-visitors, who were not significantly different from one another;
- There were also some interesting differences between less recent visitors and non-visitors that may offer further insight into why the less recent visitors had not returned recently. These included differences on the two defining characteristics and in viewing the Canadian Badlands as a place where you learn and a place for children to have fun.

Geographic differences in perceptions existed, as shown in Table 9.

- Edmontonians were the most positive of all markets on the descriptions of the Canadian Badlands presented, giving significantly more favorable responses to eighteen of the twenty-two items;
- Next most positive was the Calgary market. Calgarians strongly support the two distinguishing characteristics of the Canadian Badlands (unusual landscapes and dinosaurs) and were more likely to rate it a place to learn and a place for adults to experience unusual and rare attractions and activities. They also expressed high comfort in the region, along with approbation of the friendliness of the locals and good weather;
- In Kamloops/Kelowna, above average support of the Canadian Badlands as the best place for dinosaurs, a place to learn and to experience unusual and rare attractions and activities was expressed. In addition, interior BC residents thought there were lots of interesting places to visit, including interesting small towns and cities and that the Canadian Badlands was fun for adults to visit;
- Winnipeg and Regina were less positive, and significantly less likely to agree that the Canadian Badlands is the best place in the world for dinosaurs. Based on focus group findings, we know that there are people in these cities who have never heard of Drumheller, the Royal Tyrrell Museum or dinosaurs in Alberta and this may have influenced their responses rather than disputing the quality of the resource. Winnipeg showed below average consciousness of the unusual natural features and landscapes in the region while rating the nightlife somewhat higher. Regina residents provided low ratings for the region as being fun for children, on the friendliness of local inhabitants and the availability of arts-related activities and events;
- Saskatoon residents were less positive on a large number of dimensions, all of which dealt with Component 1 activities and services;
- People in Vancouver were least knowledgeable about the Canadian Badlands, being more likely than any other geographic market to answer "don't know" to the statements. Among those who did provide a rating, the responses were significantly less favorable on fourteen dimensions, including that it is boring to drive through and that distances are too great.

Table 9: Average ratings° of statements relating to the Canadian Badlands by geographic market (n=Total rating each item)

	Total	Vancou-ver	Kamloops/ Kelowna	Edmon-ton	Calgary	Saska-toon	Regina	Winni-peg
Has unusual natural features and landscapes	4.28	4.11**	4.22	4.46*	4.45*	4.32	4.22	4.13**
The best place in the world to go for dinosaurs	4.23	4.02**	4.35*	4.39*	4.49*	4.20	4.02**	4.06**
Has beautiful scenery	4.12	3.90**	4.07	4.31*	4.14	4.15	4.08	4.13
A place where you learn	4.08	3.89	4.27*	4.30*	4.19*	3.96	3.94	4.00
Offers unusual and rare attractions, activities and experiences	3.97	3.90	4.10*	4.13*	4.06*	3.86	3.82	3.88
Fun for children	3.92	3.77**	4.00	4.11*	3.98	3.85	3.75**	3.91
There are lots of interesting places to visit	3.90	3.74**	4.01*	4.12*	3.89	3.80**	3.84	3.88
Offers western experiences and pioneer history	3.82	3.76	3.91	3.93*	3.90	3.65**	3.82	3.74
Includes interesting small towns and cities	3.80	3.76	3.93*	4.02*	3.84	3.64**	3.70	3.73
People are friendly	3.78	3.68**	3.82	3.90*	3.97*	3.67**	3.67**	3.73
Fun for adults	3.77	3.64**	3.91*	3.88*	3.84*	3.61**	3.71	3.74
You can see lots of wildlife and birds	3.74	3.70	3.68	3.77	3.80	3.72	3.79	3.70
There are lots of opportunities for relaxation	3.69	3.58**	3.66	3.87*	3.73	3.57**	3.64	3.75
The weather is great for visiting	3.62	3.41**	3.58	3.80*	3.74*	3.54**	3.59	3.58
Offers opportunities to learn about Aboriginal culture	3.60	3.64	3.63	3.71*	3.61	3.48**	3.55	3.56
There are good hospitality services (e.g., accommodation, food)	3.59	3.44**	3.59	3.65	3.71	3.58	3.53	3.61
There are lots of different recreational activities you can do	3.59	3.43**	3.62	3.73*	3.66	3.49	3.49	3.62
A comfortable, familiar place for you	3.35	3.09	3.30	3.54*	3.64*	3.26	3.28	3.21
Rich in the arts - theatre, music festivals, painting, pottery and more	3.29	3.21	3.34	3.45*	3.34	3.28	3.14**	3.23
There is enough for you to do at night	3.24	3.12**	3.25	3.29	3.18	3.22	3.26	3.36*
The distance between attractions is too great	2.91	3.08*	2.86	2.84	2.86	2.92	2.96	2.88
Boring to drive through	2.50	2.78*	2.58	2.20**	2.61	2.42	2.51	2.44

° 5=Strongly agree 1=Strongly disagree
* Significantly higher than other markets ** Significantly lower than other markets

From a demographic perspective, the following were found:

- There were only a few differences between Young Families and Mature Families/Singles. Young Families were more likely to find the Canadian Badlands boring to drive through and the distance between attractions too great (especially pre-school and school-age families), while Mature Families/Singles more often thought that there are lots of interesting places to visit there (especially older singles/groups). Mature Families/Singles also had a more positive view of the presence of unusual natural features and landscapes (particularly empty nesters), that it is the best place in the world for dinosaurs and offers western experiences and pioneer history (both empty nesters and older singles/groups);
- It was interesting that all households with children agreed to the same extent that the Canadian Badlands is fun for children, since this implies fun for all ages of children. However, it was also evident that the parents of pre-school children – the next generation to visit – were much less knowledgeable about the region, being more likely than any other lifestage to answer "don't know" to virtually every statement.
- Empty nesters were especially likely to find people friendly in the region, and both the older lifestages rated hospitality services higher.
- The group most satisfied with what is available to do at night was the older singles/group, while grown families were the least satisfied. The oldest group was also more likely to agree that there is a rich arts resource to explore and that unusual and rare attractions, activities and experiences are available.
- Females rated the Canadian Badlands higher than males on most dimensions. The main exceptions were that males were more likely to feel that the region is boring to drive through, while there were no differences in their assessment of familiarity and comfort, friendliness of the locals, having unusual natural features, dinosaurs and the distance between attractions.

Some differences were apparent between the traveler segments:

- Accomplishers were slightly more likely than the other segments to support the Component 2 distinctive features; to agree that the Canadian Badlands has beautiful scenery, is a place where you learn, offers rare and unusual attractions, activities and experiences and that there are lots of interesting places to visit there;
- Real Relaxers were less likely to see the Canadian Badlands as fun for either children or adults, that there is enough to do at night, that there are lots of recreational activities available, lots of wildlife to see, aboriginal heritage to learn about or that it is rich in the arts;
- Comfort Seekers rated hospitality services and the availability of arts-related attractions and events higher than average; and

- Urban Explorers were distinctive only for having the highest rate of "don't know" responses, closely followed by Comfort Seekers.

Among the general destination clusters, the Sun and Warmth cluster also had a very high level of "don't know" responses, followed by North Central travelers. A few distinctive differences between these groups were found:

- The Sun and Warmth cluster was more likely to agree that the Canadian Badlands is boring to drive through and less likely to feel that it has beautiful scenery;
- Prairie Hearts agreed at a higher rate that there are good hospitality services in the region;
- The Peripatetic cluster was least likely to feel that the Canadian Badlands is boring to drive through or that distances are too great and most supportive of the statement that it has unusual natural features and landscapes. Peripatetics were more likely to feel comfortable there than the other clusters; however, they were less enthused about the hospitality services available.

The richest information, however, comes from combining travel patterns in and through the region with perceptions of regional attributes. Looking at the Canadian Badlands travel clusters, it was evident that the more experienced visitors were also the most positive on many dimensions:

- Regional Explorers, the group that visited destinations throughout the region, were the most enthusiastic about the Component 2 distinctive features of the Canadian Badlands. They strongly agreed that the Canadian Badlands offers unusual natural features and landscapes, is the best place in the world for dinosaurs, offers learning opportunities and unusual and rare attractions, activities and experiences.

  They also expressed an above average level of support for Component 1 activities and services, indicating that there are lots of interesting places to visit, that the region is fun for adults and rated nightlife better than other clusters. They were especially likely to find people friendly and liked the weather at an above average rate.
- Both Regional Explorers and Been There cluster members agreed strongly that the region has beautiful scenery, includes interesting small towns and cities, offers lots of opportunities for relaxation and lots of different recreational activities one can participate in. Both rated the region as more comfortable and familiar than average. What is notable here is that Been There perceptions were similar to those of Regional Explorers on a few items, but that the more in-depth Regional Explorers supported the region on a far more diverse set of items.
- Southern Visitors had the highest "don't know" responses, suggesting that just traveling through the region on the major highways provides limited exposure to what is available. This cluster was less likely to agree that the Canadian Badlands is the best place in the

world for dinosaurs, a place where you learn, or fun for children – a finding that helps to confirm the importance of Drumheller and dinosaurs (which they tend not to have visited) in supporting the image of the region as a fun place for children.

- The Just Drumheller cluster was least satisfied of all with what is available to do at night, was somewhat less enthused about the recreational activities available, the ability to see wildlife and birds, opportunities for relaxation, the scenery and the natural features and landscapes. A travel pattern focusing on the northern part of the region clearly lacks the diverse and complementary experiences that can be found in the south.
- There were no distinctive patterns for the Scratched the Surface cluster, other than the second highest set of "don't know" responses.

INTEREST IN SIGNATURE ATTRACTIONS

Overall results

As one approach to increasing visitation to the region is to increase awareness of what it has to offer and to augment the product offerings themselves, a question was asked to measure market interest in eight signature attractions. Based on the focus group findings, four activities were added to the attractions to offer a more diverse view of what there is to see and do in the region, since one of the criticisms voiced was that recreational activities were barely mentioned in any of the materials shown.

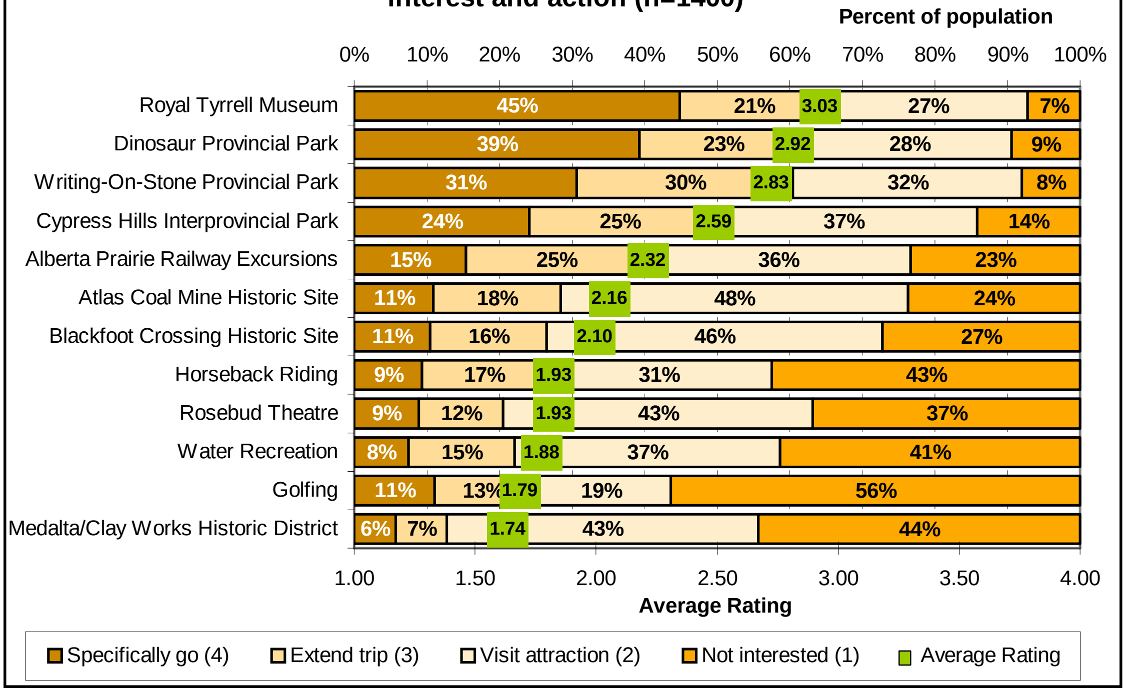
For the survey, respondents were shown pictures and a short description of each attraction or activity so that they would know what they were looking at. These pictures provided the added benefit of displaying different types of scenery found in the region.

They were asked the following question: "The pictures and descriptions in the pile of cards below show some of the attractions in the Canadian Badlands. To what extent would each of these attractions influence you to visit the Canadian Badlands?" The response categories identified the power of each attraction to draw visitors to the region and increase the economic benefit to Alberta and to the Canadian Badlands. The categories were:

> I would specifically go to the Canadian Badlands to see this
> I would extend my trip in or through Alberta to see this
> I would visit this attraction but it wouldn't change how long I stay on my trip in Alberta
> I would not go there – it doesn't interest me

The overall responses are shown in Exhibit 24 and described below, next to the picture and explanation that was shown.

Exhibit 24: Appeal of signature attractions/activities in stimulating interest and action (n=1400)



The **Royal Tyrrell Museum** attracted the largest proportion of people who thought they would specifically visit the Canadian Badlands to see it. There were also very few people who would not be interested in visiting at all. Altogether, two-thirds of the market would spend additional funds in Alberta and the Canadian Badlands to visit the museum and another quarter would impact the Canadian Badlands alone.

Royal Tyrrell Museum
Internationally recognized for its palaeontology research, the Royal Tyrrell Museum hosts the largest collection of dinosaurs in the country as well as numerous dynamic interactive galleries.

Dinosaur Provincial Park
A UNESCO World Heritage Site protecting one of the world's richest dinosaur fossil beds. Camp in the park; take a guided hike or bus tour to dig sites and visit the new interactive interpretive centre.

Further confirming that dinosaurs reign supreme in their attraction power was the ranking of **Dinosaur Provincial Park** as the second most powerful draw. The largest response was again to visit the Canadian Badlands specifically to see the park.

Writing-on-Stone Provincial Park
Camp amongst the haunting landscapes of sandstone cliffs and eroded hoodoos. Take an interpretive tour featuring the largest collection of Aboriginal rock art in North America.

Ranked number three, the attraction power of **Writing-on-Stone Provincial Park** is split equally between people enthused enough to specifically travel to the Canadian Badlands to see it, people who would extend their trips while in Alberta to visit (all with an incremental economic impact), and people who would go there, but would not take additional time to do so.

Pointing to the strength of the attraction of the provincial parks in the region, **Cypress Hills Interprovincial Park** proved to be the next strongest draw, based on both its landscapes and recreational opportunities. More than half the market would either go specifically to visit or extend a trip in Alberta to go there and another 37% would visit as part of a trip, but would not extend their stay to do so.

Cypress Hills Interprovincial Park
An oasis on the prairies and the highest point in Canada between the Rockies and the east coast, this park offers Aboriginal history, great RV camping, water sports, hiking and wildlife viewing.

Alberta Prairie Railway Excursions
Board a steam or diesel- powered train for a one day adventure where your journey will be brought to a screeching halt by dreaded outlaws before arriving in Big Valley for a meal prepared by the community.

The final attraction with strong potential to influence trips to the region is the **Alberta Prairie Railway**. 40% would travel specifically or extend their trip to take part in this adventure and another 36% would take part if they were in the vicinity.

The drawing power of the **Atlas Coal Mine Site** is more limited as almost half would only visit the attraction if they were in the area and would not spend more time there to do so. Nevertheless, 29% would make special efforts to see it.

Atlas Coal Historic Site
Take an interpretive tour of the eight storied, coal sorting tipple. Ride the teeth chattering mantrip car and learn about a miner's life in the early 20th century when "coal was king."

Blackfoot Crossing Historic Park
This stunning new interpretive centre, overlooking the spectacular Bow River Valley, immerses you in Blackfoot culture through exhibits and performances. Spend the night and sleep in teepees and eat traditional foods.

Rated on par with the Atlas Coal Mine Site was another historic attraction, the new **Blackfoot Crossing Historic Park**. This site would influence the destination of 27% of the market, but the majority would only visit if they were in the area and would not extend their trip to do so.

Horseback Riding
Experience Alberta's western heritage from the saddle. Ride through the badlands, river valleys and prairie grasslands and complete the experience with an overnight stay in a guest ranch.

In the focus groups, part of the attraction of the Alberta Prairie Railway image (without any explanation) was the **horseback riding**, with many participants envisaging themselves in the bandits' place. For this reason, one of the activity images included in the survey showed riders, while their western gear supported this aspect of what the Canadian Badlands has to offer. 57% demonstrated some interest in engaging in a western experience, though only half this number would specifically travel to the Canadian Badlands or extend their stay to take part.

Water Recreation
Experience the many lakes and rivers of the Canadian Badlands. Paddle a prairie river, cast your line in a reservoir lake, test your skills on a wake board, or simply soak up the sun on a sandy beach.

Continuing on with the remaining activities, the image of **water recreation** supported water based activities in the region. These appealed to 59%, with half of those interested being sufficiently motivated to visit the region or extend their stay to take part – a similar result to horseback riding.

Golfing
Golf and be challenged on one or more of the Canadian Badlands championship courses in the breathtaking landscapes of hoodoos, coulees and eroded river valleys.

The final activity image was of **golfing**. Golf has more limited participation than water sports so the results here are actually quite strong. Even though the majority of the population would not be interested in participating at all, more than half of those who were interested would take a special trip or extend their stay to golf in this environment.

Rosebud Theatre
Take in this professional theatre located in the charming community of Rosebud and explore art galleries and craft shops before sitting down to a sumptuous meal prior to the show.

The final two attractions were both arts related. Of the two, the **Rosebud Theatre** proved to have considerably more drawing power. Almost two-thirds were interested in the theatre, the majority as something to do while in the area. 21% would make a special trip or extend their trip to attend.

Medalta Potteries and Clay Works Historic District
Interpreting the industrial history of Medicine Hat using the special clays of the badlands. Learn about how they supplied bricks, pottery and other household products to all of western Canada.

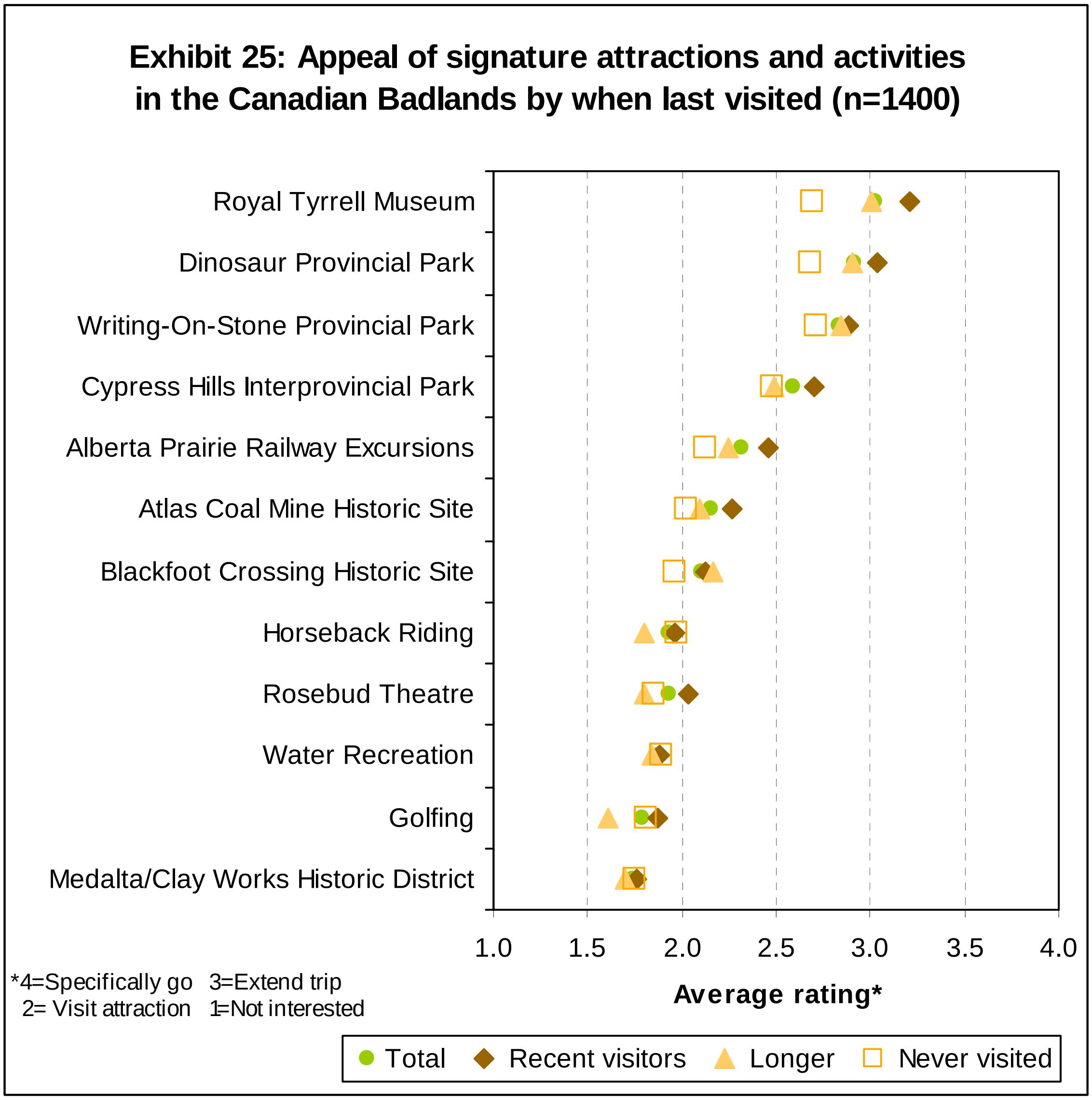
Medalta Potteries and Clayworks Historic District was of interest to 56%, but very few would be motivated to travel to the region or extend their stay specifically to see this attraction.

It is apparent that there is interest in each of the attractions and activities shown, but that it is primarily the natural attractions – which correspond to the Component 2 distinctive features of the region – that have the power to draw a substantial portion of the market to the area or to entice them to stay longer. The remaining attractions help to round out the experience but are not sufficiently strong to lead the appeal.

Differences between different groups

Exhibit 25 looks at the data using average ratings and compares the responses of more with less recent visitors and non-visitors:

- People who had never been to the Canadian Badlands were significantly less interested than past visitors in the natural and historic features of the region, although these remained the highest rated attractions. Their interest pattern was closer to the average – and therefore relatively stronger – on the activities shown (horseback riding, water recreation, golf as well as the Rosebud Theatre and Clay Works Historic Site) and may reflect a lack of knowledge of what is on offer that could influence future behavior;



- Recent visitors rated the top six attractions as more appealing and likely to influence a trip and were significantly more interested in visiting the Rosebud Theatre, but were only average on the three activities;
- Visitors who had not returned for a longer period than five years were less interested than recent visitors in many of the attractions and would not be lured back by the activities. However, their interest in the new Blackfoot Crossing Historic Site was slightly higher and might be a reason to return.

The Royal Tyrrell Museum and the three provincial parks appear to have substantial potential to draw non-visitors to the province too. People who had not taken a pleasure or vacation trip in Alberta in the past three years were most likely to be lured by the Royal Tyrrell Museum (41% would specifically go to the Canadian Badlands to see this and 22% would extend a trip in or through Alberta to visit), Dinosaur Provincial Park (36%/23%) and Cypress Hills Interprovincial Park (21%/23%).

Geographic differences in reactions to the attractions existed, as shown in Table 10.

- Albertans were the most enthusiastic about visiting any and all the attractions and taking part in activities. Edmonton residents gave slightly higher scores to the Blackfoot Crossing Historic Park and Alberta Prairie Railway, but Calgary scores were higher on all the other attractions. In comparison to Edmonton, Calgary stood out for their interest in golfing in the Canadian Badlands and visiting Cypress Hills Interprovincial Park;
- The next most enthused market was Kamloops/Kelowna, with particular interest being expressed in the two dinosaur attractions and the two historic sites. They were low in wanting to golf or visit Cypress Hills Interprovincial Park;
- Vancouver showed relatively low interest in all the attractions that had higher potential to draw people to the region and were also less interested in golfing in the Canadian Badlands;

Table 10: Average ratings° of signature attractions and activities in the Canadian Badlands by geographic market (n=1400)

	Total	Vancouver	Kamloops/ Kelowna	Edmonton	Calgary	Saskatoon	Regina	Winnipeg
Royal Tyrrell Museum	3.03	2.70**	3.26*	3.32*	3.34*	2.80**	2.95**	2.84**
Dinosaur Provincial Park	2.92	2.74**	3.02*	3.05*	3.15*	2.70**	2.91	2.90
Writing-On-Stone Provincial Park	2.83	2.67**	2.87	2.99*	3.05*	2.76	2.83	2.65**
Cypress Hills Interprovincial Park	2.59	2.32**	2.45**	2.64	2.73*	2.81*	2.77*	2.41**
Alberta Prairie Railway Excursions	2.32	2.10**	2.25	2.59*	2.54*	2.31	2.24	2.25
Atlas Coal Mine Historic Site	2.16	1.98**	2.28*	2.30*	2.24*	2.15	2.13	2.02**
Blackfoot Crossing Historic Site	2.10	2.08	2.18*	2.22*	2.13	2.05	2.05	1.99**
Horseback Riding	1.93	1.85	1.86	2.02	2.00	1.86	2.02	1.90
Rosebud Theatre	1.93	1.82	1.78	2.06*	2.25*	1.84	1.93	1.81
Water Recreation	1.88	1.87	1.78	1.99*	2.09*	1.85	1.83	1.76
Golfing	1.79	1.60**	1.63**	1.83	2.07*	1.82	1.87	1.71
Medalta Potteries and Clay Works Historic District	1.74	1.70	1.80	1.75	1.77	1.72	1.73	1.72

° 4=Specifically go 3=Extend trip 2= Visit attraction 1=Not interested
* Significantly higher than other markets ** Significantly lower than other markets

- The two Saskatchewan communities were relatively average, with somewhat more interest in Cypress Hills Interprovincial Park and less in the Royal Tyrrell Museum. Saskatoon also had below average interest in Dinosaur Provincial Park;

- There were no attractions or activities that would appeal to Winnipeg residents at an above average rate, and many that scored particularly low, including most features of the region and the historic sites.

From a demographic perspective, a number of attractions proved to be of greater or lesser interest to different groups:

- Young Families – and particularly school-age families – rated the Royal Tyrrell Museum, Dinosaur Provincial Park, the Atlas Coal Mine Historic Site and water recreation higher in appeal than Mature Families/Singles;
- Horseback riding and associated western experiences were rated far higher by families with children of all ages, from pre-school to teen, and were most favored in the lowest income and education groups;
- At the other end of the lifestage spectrum, the Rosebud Theatre and Medalta Potteries and Clay Works Historic District were rated higher by Mature Families/Singles, especially empty nesters and older singles/groups;
- Golfing had less appeal among older singles/groups and more as income increased;
- Education was a distinguishing characteristic of interest in the Royal Tyrrell Museum and Dinosaur Provincial Park, with interest increasing with increasing education;
- Women were more interested than men in the Alberta Prairie Railway, Rosebud Theatre, Medalta Potteries and Clay Works Historic District and horseback riding.

In terms of traveler segments:

- Accomplishers showed greater interest than the other groups in most of the Component 2 distinctive features of the region – Dinosaur Provincial Park, Writing-on-Stone Provincial Park, Cypress Hills Interprovincial Park – as well as Blackfoot Crossing Historic Park and in horseback riding;
- Comfort Seekers rated Cypress Hills Interprovincial Park and the Atlas Coal Mine Historic Site as being of greater interest than to the other segments and were average in their reactions to the remaining attractions and activities;
- Real Relaxers showed below average interest in Dinosaur Provincial Park, Writing-on-Stone Provincial Park and Atlas Coal Mine Historic Site;
- Urban Explorers expressed less than average interest in Cypress Hills Interprovincial Park.

There were some insights to be gained from looking at interest in the various attractions and activities along with the travel clusters, both those dealing with general travel patterns and those capturing routes in the region.

- On the whole the BC Centric cluster was most interested in all attractions and activities, a finding that probably reflects the high percentage of Calgary residents in the cluster. However, it does suggest that the region may be in a position to help retain tourism dollars within the province rather than exporting them to BC. Prairie Hearts was the next most interested cluster;
- Among the Canadian Badlands travel clusters, the already well exposed Regional Explorers were most enthused about most of the attractions and activities. The two clusters with more constrained paths through the region, Just Drumheller and Southern Visitors, were less impressed by the images, suggesting that they may not be swayed from current travel patterns. The little exposed Scratched the Surface cluster, however, showed average interest in most attractions and above average scores for Dinosaur Provincial Park and Writing-on-Stone Provincial Park.

INTEREST IN THE EXPERIENCES THAT THE CANADIAN BADLANDS HAS TO OFFER

Overall results

A list of 38 experiences that are offered in the Canadian Badlands or are under consideration for development or enhancement was compiled and respondents were asked to indicate which were of interest to them. On average, each person chose 13 experiences of interest.

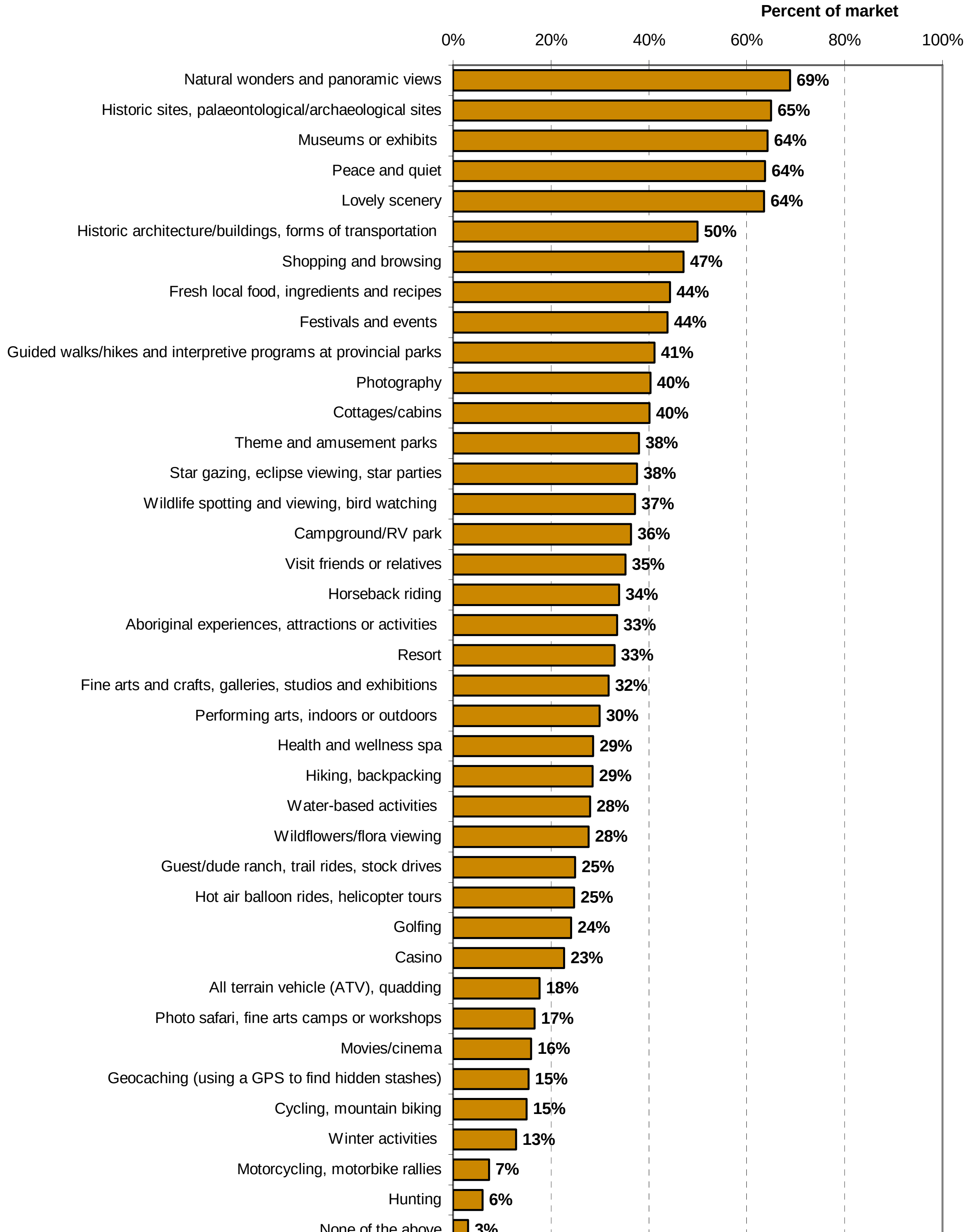
The overall results are shown in Exhibit 26. They are interesting because four of the top five experiences – each one of interest to over 60% of the market – are all encompassed by the Component 2 distinctive features of the region. The fifth item, peace and quiet, is perhaps a by-product of what is expected and desired in a predominantly outdoor rural destination. The full description of each of the top items was:

Natural wonders and panoramic views (e.g., unusual rock formations, geological layers, canyons/coulees, hoodoos)
Historic sites, palaeontological/archaeological sites (e.g., coal mine, ghost town, authentic pioneer village, dinosaur dig)
Museums or exhibits (e.g., dinosaur museum, heritage museum, NWMP, industrial heritage museums)
Peace and quiet
Lovely scenery (e.g., green rolling hills, lakes, river valleys, prairie)

The sixth most frequently mentioned experience at 50%, was historic in nature and also fit into Component 2:

Historic architecture/buildings, forms of transportation (e.g., railway station, steam train, ferry, churches, suspension/trestle bridges)

Exhibit 26: Interest in experiencing what the Canadian Badlands has to offer (n=1400)



Some of the more popular activities that might be considered typical for visitors to engage in, no matter where they go, were encompassed in the next set of interests and were selected by 40%-49% of the market as something to do in the Canadian Badlands. They included:

Shopping and browsing
Fresh local food, ingredients and recipes
Festivals and events (e.g., rodeos, country fairs, farmers' markets, parades)
Guided walks/hikes and interpretive programs at provincial parks
Photography

The more popular supporting experiences in the Canadian Badlands were captured by the next set of responses at the 35%-40% level:

Theme and amusement parks (e.g., spray park/waterslide, snake park, dinosaur theme park, film locations)
Star gazing, eclipse viewing, star parties
Wildlife spotting and viewing, bird watching (e.g., pronghorn antelope, birds of prey)

Also found at approximately this level of interest were different types of accommodations and built amenities, some of which are under consideration for possible future development:

30%-40%:	Cottages/cabins Campground/RV park Visit friends or relatives[8] Resort
Below 30%:	Health and wellness spa Casino Movies/cinema

Somewhat less widely supported groups of experiences either were related to the arts …

20%-34%:	Aboriginal experiences, attractions or activities (e.g., rock art, interpretive center, culture, story telling) Fine arts and crafts, galleries, studios and exhibitions (e.g., pottery, stained glass, furniture, paintings) Performing arts, indoors or outdoors (e.g., theatre, dance, music, concerts, shows)
Below 20%:	Photo safari, fine arts camps or workshops

… or involved physical activity and a sense of risk or adventure:

20%-34%:	Horseback riding Hiking, backpacking Water-based activities (e.g., fishing, kayaking/canoeing, sailing, rafting, water skiing)

8. This is an important figure on it own, as it confirms impressions from the focus groups that a sizable number of people in the market can or do visit the region for VFR purposes. Their experience of the attractions in the vicinity tends to be lower than those engaged in independent travel for two reasons. One is that they focus on their interactions with family and friends. The other is that their families either do not know about or do not think of taking or directing them to the attractions available in the area. Many comments were made in the focus groups about how VFR visitors would venture further afield in the future, now that they know what else there is to see and do.

	Wildflowers/flora viewing Guest/dude ranch, trail rides, stock drives Hot air balloon rides, helicopter tours Golfing
Below 20%:	All terrain vehicle (ATV), quadding Geocaching (using a GPS to find hidden stashes) Cycling, mountain biking Winter activities (e.g., skiing, snowmobiling, snowshoeing, ice fishing) Motorcycling, motorbike rallies Hunting

Differences between different groups

There were relatively few differences between people living in different cities in the types of experiences of interest in the Canadian Badlands. The major results are shown in Table 11.

- Vancouver residents were less interested in outdoor activities like looking at natural wonders/panoramic views, scenery or flowers, taking a guided walk or attending an interpretive program in a provincial park, using a campground, golfing or hunting. They were also less interested in man-made attractions and activities like theme/amusement parks, hot air balloon rides/helicopter tours and ATVs/quadding. While they were more interested than average in resorts, overall interest in most experiences was low and more were likely to say that nothing was of interest;
- Kamloops/Kelowna residents were more interested than average in using a campground or RV park, in wildflower viewing and local foods. They had less interest in cottages/cabins and guided walks/interpretive programs in provincial parks;
- Edmontonians had higher interest in museums/exhibits, historic architecture/transportation and festivals/events. They were the most inclined to enjoy peace and quiet in the region, were interested in participating in guided walks/interpretive programs in provincial parks, wildlife/bird watching, engaging in an aboriginal experience and visiting a theme/amusement park;
- Calgary residents were also more interested in attending festivals and events and attending indoor or outdoor performing arts events. They were outdoor oriented too, with high scores on camping, hiking/backpacking and engaging in water-based activities, but were less interested in visiting friends and relatives, using cottages/cabins or going to a theme/amusement park than the other clusters;
- Festivals and events were of much less interest in Saskatoon, as were wildlife/bird and wildflower spotting and aboriginal experiences. They would visit friends and relatives, use a cottage/cabin and visit a theme/amusement park or go to a casino at above average rates;
- Regina residents were above average in their interest in guided walks/interpretive programs in provincial parks, cottages/cabins and hot air balloons/helicopter tours;

Table 11: Experiences of interest in the Canadian Badlands by geographic market (n=1400)

	Total %	Vancouver %	Kamloops/ Kelowna %	Edmonton %	Calgary %	Saskatoon %	Regina %	Winnipeg %
Natural wonders and panoramic views	69	62**	71	73	70	66	72	67
Historic/palaeontological/archaeological sites	65	62	72	70	65	63	63	60
Museums or exhibits	64	60	63	73*	67	65	59	61
Peace and quiet	64	60	65	71-	67	62	64	58
Lovely scenery	64	53**	62	66	67	67	66	65
Historic architecture/buildings, transportation	50	43	54	58*	47	50	52	46
Shopping and browsing	47	47	45	47	43	43	51	53*
Fresh local food, ingredients and recipes	44	43	50*	47	48	39	44	39
Festivals and events	44	40	47	51*	52*	35**	44	40
Guided walks/hikes and interpretive programs at provincial parks	41	32**	36**	47*	40	43	47*	43
Photography	40	43	39	45	42	35	43	36
Cottages/cabins	40	38	35**	45*	34**	45*	46*	37
Theme and amusement parks	38	32**	37	43*	32**	45*	39	38
Star gazing, eclipse viewing, star parties	38	37	40	39	41	33	42	32**
Wildlife spotting and viewing, bird watching	37	33	41	43	39	29**	40	35
Campground/RV park	36	25**	49*	38	43*	38	34	27**
Visit friends or relatives	35	32	37	31	26**	45*	40	36
Horseback riding	34	33	29	36	38	29	39	35
Aboriginal experiences, attractions or activities	33	35	37	42*	34	26**	34	27**
Resort	33	41*	28	35	28	32	34	32
Fine arts & crafts, galleries, studios, exhibitions	32	32	33	35	29	33	34	26
Performing arts, indoors or outdoors	30	27	29	34	37*	29	29	25**
Health and wellness spa	29	30	26	23	26	31	33	30
Hiking, backpacking	29	24	28	31	36*	28	31	22**
Water-based activities	28	28	25	31	34*	28	29	21**
Wildflowers/flora viewing	28	20**	33*	35*	27	23**	30	26
Guest/dude ranch, trail rides, stock drives	25	22	25	28	25	21	26	28
Hot air balloon rides, helicopter tours	25	20**	22	29	25	23	34*	20**
Golfing	24	15**	27	25	31	25	23	23
Casino	23	21	24	20	19	30*	24	21
All terrain vehicle (ATV), quadding	18	12**	21	22	18	16	19	14
Photo safari, fine arts camps or workshops	17	15	16	18	18	16	16	18
Movies/cinema	16	12	15	17	13	18	20	16
Geocaching	15	10**	15	17	17	18	16	16
Cycling, mountain biking	15	15	13	19	18	14	13	13
Winter activities	13	10	10	12	13	17	14	13
Motorcycling, motorbike rallies	7	5	11	8	7	9	6	5
Hunting	6	2**	7	5	4	11*	7	5
None of the above	3	7*	2	1	2	1	4	5

* Significantly higher than other markets ** Significantly lower than other markets

- Like Vancouverites, Winnipeg residents were less likely to rough it (camping, hiking/backpacking) and less interested in a variety of other experiences (water-based activities – which they have in abundance at home – hot air balloon/helicopter rides, aboriginal experiences, star gazing).

Of greater importance were differences in interests between men and women and between Young Families and Mature Families/Singles. These are shown in Table 12.

- In general, women found more to experience in the Canadian Badlands than men. Their interest was twice as strong as that of males for fine arts and crafts, wildflower viewing and going to a health/wellness spa. The difference was fairly large for a number of other experiences too, such as festivals and events, enjoying scenery, shopping and local foods. Men were more interested than women in golfing, cycling, motorcycling and hunting.
- Mature Families/Singles were drawn more than the younger segment by some of the same things that differentiated women most – wildflower viewing and fine arts and crafts in particular.
- Young Families were far more likely to want to engage in sports activities, to visit theme parks, movies or make an event of looking at the night sky, to take a hot air balloon or helicopter ride and enjoy more rustic accommodations and activities at a guest ranch, camp site or a cottage/cabin. Sports activities of interest to Young Families usually spanned all family life stages from pre-school to teens, though water-based activities and theme/amusement parks predominated in the two youngest age groups (pre-school and school-age).
- Golfing and water-based activities appealed more in the highest income group, while casinos were increasingly attractive with decreasing income.

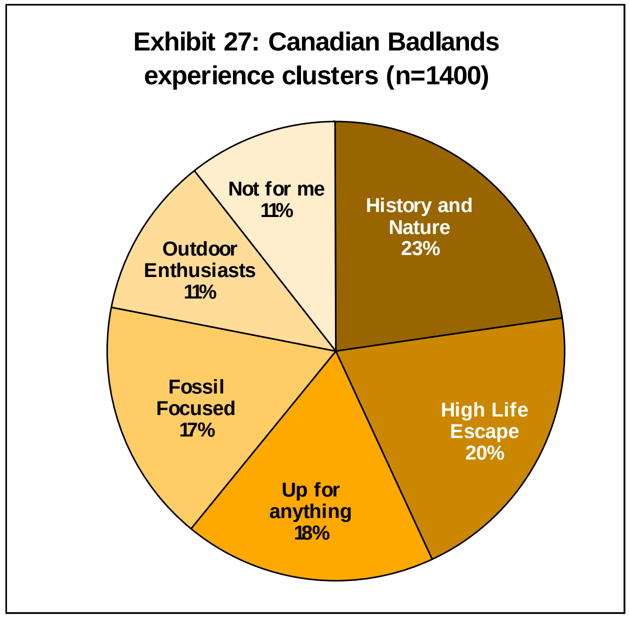
Table 12: Experiences of interest in the Canadian Badlands by gender and market segment

	Total (n=1400) %	Male (n=700) %	Female (n=700) %	Young Families (n=599) %	Mature Families/ Singles (n=801) %
Natural wonders and panoramic views	69	65	73*	67	70
Historic/palaeontological/archaeological sites	65	62	68*	64	66
Museums or exhibits	64	62	66	65	64
Peace and quiet	64	59	68*	62	65
Lovely scenery	64	56	71*	61	66
Historic architecture/buildings, transportation	50	47	53*	47	52*
Shopping and browsing	47	38	57*	48	46
Fresh local food, ingredients and recipes	44	36	53*	44	45
Festivals and events	44	35	53*	44	44
Guided walks/hikes and interpretive programs at provincial parks	41	37	45*	44	39
Photography	40	40	41	36	44*
Cottages/cabins	40	35	45*	47*	35
Theme and amusement parks	38	35	41*	57*	24
Star gazing, eclipse viewing, star parties	38	33	42*	45*	32
Wildlife spotting and viewing, bird watching	37	35	39	37	38
Campground/RV park	36	35	38	45*	30
Visit friends or relatives	35	31	39*	39*	33
Horseback riding	34	31	37*	45*	26
Aboriginal experiences, attractions or activities	33	30	37*	32	34
Resort	33	29	37*	36	31
Fine arts & crafts, galleries, studios, exhibitions	32	21	42*	23	39*
Performing arts, indoors or outdoors	30	23	37*	27	32*
Health and wellness spa	29	18	39*	30	27
Hiking, backpacking	29	31	26	39*	21
Water-based activities	28	28	28	39*	20
Wildflowers/flora viewing	28	19	36*	23	31*
Guest/dude ranch, trail rides, stock drives	25	20	30*	32*	19
Hot air balloon rides, helicopter tours	25	26	23	33*	19
Golfing	24	34*	15	26	22
Casino	23	22	23	20	25*
All terrain vehicle (ATV), quadding	18	19	16	27*	11
Photo safari, fine arts camps or workshops	17	14	20*	20*	14
Movies/cinema	16	14	18	22*	12
Geocaching	15	14	17	21*	11
Cycling, mountain biking	15	20*	10	23*	9
Winter activities	13	13	12	21*	7
Motorcycling, motorbike rallies	7	9*	5	10*	5
Hunting	6	10*	2	8*	4
None of the above	3	3	4	2	4

* Significantly higher than other group ** Significantly lower than other group

Desired combinations of experiences

A cluster analysis of the responses to this question brings many of the above findings together, providing a better understanding of the different groups of experiences desired in the market and how they correspond with other interests in the Canadian Badlands and in leisure or vacation travel generally. The cluster analysis resulted in the definition of six groups as shown in Exhibit 27.



- The largest cluster has been named **History and Nature** since group members had an especially strong interest in these experiences. This may be seen in Table 12. Scores for such history-related experiences as historic/palaeontological/archaeological sites, museums/exhibits and historic architecture/buildings/transportation were well above average. Similarly for nature, they were above average in wanting to see natural wonders/panoramic views, lovely scenery, to spot wildlife/birds and view wildflowers/flora. They were more likely to express an interest in hiking/backpacking and stargazing/eclipse viewing/star parties. Photography and peace and quiet were important. They also had higher interest in cultural or arts-related activities (aboriginal experiences, fine arts and crafts) than most other clusters.

  In addition, this cluster was distinctive for what was not of interest to them. They were significantly less interested in built facilities and amenities, like a casino, resort, movies/cinema and a health/wellness spa. They were less physically active and more risk averse than average, showing significantly lower interest in ATVs/quadding, water-based activities and motorcycling. On average, History and Nature cluster members chose 14 items of interest in the Canadian Badlands from the list.

  Looking at the signature attractions and activities shown in the survey, they proved to be more interested than many of the other clusters in the natural attractions (Writing-on-Stone Provincial Park, Cypress Hills Interprovincial Park), the historic attractions (Atlas Coal Mine Historic Site, Blackfoot Crossing Historic Park) and the cultural attractions (Rosebud Theatre, Medalta Potteries and Clay Works Historic District). They had somewhat higher than average interest in the Royal Tyrrell Museum and Dinosaur Provincial Park, which span both history and nature.

  The History and Nature cluster was the most familiar of all with the Canadian Badlands and had the most favorable overall opinion of it. As such, their opinions may define the best of what is available in the region.

Table 12: Experiences of interest in the Canadian Badlands by experience cluster

	Total (n=1400) %	Up for Anything (n=252) %	Outdoor Enthus-iasts (n=158) %	High Life Escape (n=282) %	History and Nature (n=320) %	Fossil Focused (n=240) %	Not for Me (n=148) %
Natural wonders and panoramic views	69	97*	75	43**	91*	71	13**
Historic/palaeontological/archaeological sites	65	95*	74	24**	92*	76	7**
Museums or exhibits	64	95*	62	28**	83*	87*	7**
Peace and quiet	64	90*	73	73	81*	30**	10**
Lovely scenery	64	93*	75*	52	86*	40**	14**
Historic architecture/buildings, transportation	50	87*	52	11**	71*	53	7**
Shopping and browsing	47	84*	57*	55*	34	31	12**
Fresh local food, ingredients and recipes	44	90*	53*	48	42	15**	3**
Festivals and events	44	89*	51*	40	44	21**	5**
Guided walks/hikes and interpretive programs at provincial parks	41	76*	53*	14**	55*	34	3**
Photography	40	66*	47*	25	52*	31	7**
Cottages/cabins	40	77*	65*	41	37	11**	4**
Theme and amusement parks	38	69*	63*	29	28	34	3**
Star gazing, eclipse viewing, star parties	38	74*	52*	20**	50*	16**	2**
Wildlife spotting and viewing, bird watching	37	63*	46*	15**	64*	12**	8**
Campground/RV park	36	52*	69*	26**	39	26**	6**
Visit friends or relatives	35	49*	51*	37	29	34	6**
Horseback riding	34	52*	70*	33	27	18**	7**
Aboriginal experiences, attractions or activities	33	68*	32*	12**	55*	14**	2**
Resort	33	67*	47*	41*	19**	13**	8**
Fine arts & crafts, galleries, studios, exhibitions	32	78*	8	17	43*	21	1**
Performing arts, indoors or outdoors	30	77*	14	23	29*	18	1**
Health and wellness spa	29	64*	38*	35*	18**	8**	2**
Hiking, backpacking	29	42*	72*	5**	37*	17	6**
Water-based activities	28	51*	70*	27	17**	6**	5**
Wildflowers/flora viewing	28	63*	13	14	48*	7**	-**
Guest/dude ranch, trail rides, stock drives	25	55*	54*	19	15	8**	2**
Hot air balloon rides, helicopter tours	25	44*	51*	23	18	10**	5**
Golfing	24	22	45*	33*	16	20	12**
Casino	23	37*	24*	39*	9	13	11
All terrain vehicle (ATV), quadding	18	25*	58*	19*	5**	8**	2**
Photo safari, fine arts camps or workshops	17	43*	26*	8**	14	6**	-**
Movies/cinema	16	44*	25*	15*	4**	5**	4**
Geocaching	15	34*	26*	5**	15*	9	3**
Cycling, mountain biking	15	21*	50*	6**	12	5**	5**
Winter activities	13	22*	52*	6	4	4	1**
Motorcycling, motorbike rallies	7	12*	19*	7	3**	2**	5**
Hunting	6	6	21*	6	3	1**	3
None of the above	3	-	-	-	-	-	29*

* Significantly higher than other cluster ** Significantly lower than other clusters

On the detailed list of perceptual attributes relating to the Canadian Badlands, this cluster provided higher scores than most others on most of the dimensions and disagreed most with the premise that the region is boring to drive through. The only exceptions to their high scores were for having enough to do at night, for awareness of recreational activities, the richness of the arts scene and the distance between attractions, which were all scored average.

Made up of an equal proportion of males and females, two-thirds were Mature Families/Singles living in smaller households than average. Since over half had no children in the household, they were overrepresented among empty nesters and older singles/groups. As a result they were likely to travel most frequently as a couple or by themselves with adult friends or occasionally alone. They were slightly more often from Edmonton and less often from Winnipeg, but location was not a major differentiator.

In terms of traveler segments, they were less likely than average to be Urban Explorers (29% vs. 38% overall) since they had a strong interest in tranquil rural destinations.

History and Nature cluster members traveled at a slightly above average rate throughout Canada and were somewhat overrepresented in the BC Centric and Peripatetic destination clusters. They were somewhat less likely to travel in Alberta October through March and were above average in favoring camping (tent or RV) as the most frequent form of accommodation. They had made relatively few trips to Alberta in the past three years.

57% had visited the Canadian Badlands in the past five years and very few had never been there (14%). However, the last trip by the cluster as a whole was not more recent than average. They identified the largest number of places visited on the map (10.1), though no distinctive pattern of travel through the region was found.

- People interested in a **High Life Escape** made up the next largest cluster. Although they selected an average of 10 activities they might participate in, their interest in what the Canadian Badlands has to offer was generally below average, except for golf, shopping and enjoying peace and quiet. They would use a casino, resort and health/wellness spa in the region. The core Component 2 distinctive features, however, were rated of below average interest, along with guided walks, hiking and cycling and campgrounds.

  Among the signature attractions and activities, High Life Escape members were more interested in the activities, especially water recreation and golf, to some degree horseback riding, and also in visiting Cypress Hills Interprovincial Park (presumably because recreational opportunities were shown and described). Their interest in Atlas Coal Mine Historic Site was well below average.

  High Life Escape members were average in their familiarity with and opinions of the Canadian Badlands. However, among the perceptual dimensions relating to the region, they agreed at an above average rate that the distance between attractions is too great and that it is boring to drive through, despite their expectation of seeing wildlife and birds along the way.

Members of this cluster were less well educated and less likely to be Accomplishers. They predominantly preferred familiar destinations and were less interested in seeing new places, staying at privately owned cottages/cabins more often than most.

They were below average visitors to Saskatchewan and were most likely to belong to the Sun and Warmth destination cluster, less often to the BC Centric cluster. However, they had made an above average number of trips to and in Alberta and were especially likely to have visited Alberta North. The time since their last visit to the Canadian Badlands was slightly longer than average and a below average proportion had visited Drumheller (42%). 41% belonged to the Scratched the Surface travel cluster and they were underrepresented among Regional Explorers.

- The cluster termed **Up for Anything** were enthused about most of the experiences presented at well above average levels, checking an average of 23 items. They were distinctive for their interest in the creative arts (over 75%), including fine arts and crafts/galleries/studios/exhibitions, indoor or outdoor performing arts, local festivals and events and local foods/ingredients/recipes. While appealing to fewer cluster members, they were also the group most likely to be interested in a photo safari/fine arts camp/workshop. There were many other experiences on which they proved to be the most interested cluster, but there were usually other clusters with a high score on those activities as well.

  Up for Anything cluster members also had the highest level of interest in most signature attractions and activities, with the exception of Dinosaur Provincial Park and golf, which were average. Their scores for the arts and culture items were especially strong (Blackfoot Crossing Historic Park, Rosebud Theatre and Medalta Potteries and Clay Works Historic District), along with their interest in the Alberta Prairie Railway.

  This cluster had average familiarity with the Canadian Badlands but held a strongly positive opinion of it. In terms of their specific perceptions, their level of agreement with the various items was even higher than that of the History and Nature cluster, particularly on having enough to do at night, opportunities to learn about aboriginal culture and the richness of the arts scene, opportunities for relaxation and to enjoy western experiences. They were the only group to be above average in scoring the region as fun for both children and adults.

  This cluster was predominantly female (71%) with a below average household income. They were underrepresented among Real Relaxers since challenging themselves rather than relaxing was important when on a leisure trip.

  Their travel patterns showed a below average likelihood of visiting the US or belonging to the Sun and Warmth destination cluster, while being overrepresented in the BC Centric and North Central clusters. They made above average use of the Internet as an information source and were more likely than others to use travel associations as an ancillary source and to follow road signs/billboards.

Up for Anything visitors to the Canadian Badlands had, on average, made the most recent trips to the region. They were slightly overrepresented in the Southern Visitors and Regional Explorer groups and underrepresented among those who have Been There.

- The cluster named **Fossil Focused** was primarily interested in dinosaurs. Although they averaged 8 activity choices, they were at or below average on all experiences other than historic/palaeontological/archaeological sites and museums/exhibits.

  The Fossil Focused were less interested than most clusters in the region's signature attractions other than the Royal Tyrrell Museum and Dinosaur Provincial Park, where they were average, suggesting that while this was the only theme that was of interest to them, it was not an overly compelling one. They scored their likelihood of taking part in activities like horseback riding, golf and water recreation especially low, along with below average interest in the recreational activities at Cypress Hills Interprovincial Park.

  This cluster claimed high familiarity with the Canadian Badlands, but their overall impressions indicated only average favorability. Specific perceptual dimensions showed a similar pattern. The cluster was above average in seeing it as the best place in the world to go for dinosaurs, as a place where you learn and one that offers unusual and rare attractions. Their remaining scores were mostly average. While they did agree that the region has unusual natural features and landscapes, they were also more likely to say it is boring to drive through.

  The Fossil Focused included a high proportion of males and a somewhat higher proportion of people aged 55-64 who still had adult children living at home (i.e., grown families). It had an above average concentration of Saskatoon and Winnipeg residents.

  While spread across all traveler segments, they were especially interested in seeing new places, did not value peace and quiet on a vacation or leisure trip and were less likely to be members of the BC Centric cluster. They had visited Alberta less often than average in the past three years but had last been to the Canadian Badlands at an average rate. Not surprisingly, this cluster included a high proportion from the Just Drumheller travel cluster (30%) and was somewhat less likely to have Been There.

- **Outdoor enthusiasts** chose an average of 18 items on the list of experiences, distinguishing themselves from the other clusters by the high rate of selection of all outdoor activities (e.g., hiking/backpacking, water-based activities, horseback riding, ATV/quadding, cycling/mountain biking, winter activities and golfing). They were interested at an above average rate in visiting a guest ranch, a campground/RV park, cottage/cabin and taking a hot air balloon/helicopter ride or visiting a theme/amusement park.

  Among the signature attractions and activities, their scores on the activities stood out (horseback riding, water recreation and golfing) and they were among the top scorers for interest in visiting Cypress Hills Interprovincial Park. They were also very interested in Writing-on-Stone Provincial Park, the Alberta Prairie Railway and Atlas Coal Mine Historic Site.

Outdoor Enthusiasts had average familiarity with the region and a strongly positive overall image of it. However, when it came to specifics, they did not have a distinctive image of what was available there, generating average scores on most perceptual dimensions, with a slight propensity to see the drive as boring and having long distances between attractions.

This cluster was overwhelmingly made up of Young Families (74%) and included a high proportion of males, particularly in the 25-34 and 35-44 age cohorts. The vast majority were married or living common-law (87%) and had children under 18 living at home. As a result, they lived in the largest households, with children in all age groups, but especially in pre-school and school-age family homes. Their travel parties most frequently included children, generally the nuclear family and occasionally with other relatives.

Outdoor Enthusiasts had the highest household income of all clusters and included the highest proportion of Accomplishers and the lowest of Urban Explorers. They were more interested in rural than urban destinations, look for excitement and like to challenge themselves on a trip.

The cluster was notable for its high rate of taking weekend trips most often, with occasional one to two week trips. They traveled from October through March as well as in July and favored both luxury hotels and tents at an above average rate. They were especially likely to use the Internet as a source of information.

Outdoor Enthusiasts were overrepresented in traveling in Canada and western Canada, with Alberta as a major destination. In fact, they made the largest number of trips to or in Alberta of any of the clusters, being especially likely to have visited Edmonton and Area and the Canadian Rockies. In addition, they had the shortest average time since their last trip to the Canadian Badlands and were overrepresented in both the most widely traveled Been There and Regional Explorers clusters.

- The **Not for Me cluster** found only 2 activity items on average that might be of interest, with 29% stating that they would not take part in any of the experiences available in the Canadian Badlands – probably because they would not be prepared to visit at all.

  The Not for Me cluster was significantly below average in showing interest in most signature attractions, though they were average in their scores for golf, water recreation and Medalta Potteries and Clay Works Historic District.

  Consistent with this pattern, they showed the strongest agreement that the Canadian Badlands is boring to drive through and that distances between attractions are too great, while scoring every other image dimension relating to the region well below average. Part of the reason for their very poor impression of the region may be the fact that they also had lower familiarity with it.

  This cluster included a high proportion of males, Vancouver and Winnipeg residents and a low proportion of Edmontonians.

  Accomplishers were underrepresented in the Not for Me cluster as they like to relax at familiar destinations rather than see new places. The cluster was underrepresented in their propensity to visit destinations in western Canada, particularly Saskatchewan and Alberta, were overrepresented in the BC Centric cluster and less likely to be Peripatetic. 3 to 7 day trips and luxury hotels had more than average appeal, while the Internet was far less likely to be consulted for information.

Those who had visited Alberta made an average number of trips, but they were much less likely to have visited destinations in Alberta South, the Canadian Rockies or Edmonton and Area. 47% had never visited the Canadian Badlands and those who had, had not been there for 10 years on average, the longest of any cluster. They were much less likely to have visited Drumheller (32%).

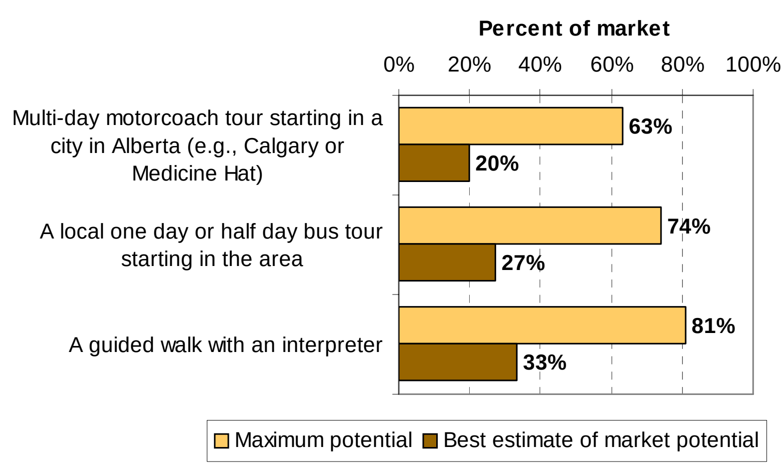
INTEREST IN ESCORTED TOURS

Having gained an impression of what the Canadian Badlands has to offer from the content of the questionnaire (in addition to their prior knowledge of the region), the potential for taking part in escorted tours with interpretation offered by a knowledgeable guide was explored. Escorted tours, like many of the other product enhancement opportunities included in the survey, were suggested in previous studies as one means to increase visitation to some of the less well known or less accessible attractions in the region.

The Juster Probabilistic Scale was used to establish the potential market size for three different forms of escorted tours discussed and defined by the focus groups. This scale is based on probability theory and ranges from 0 to 10, where 0 means 'no chance or almost no chance' and 10 means 'certain or practically certain' that they would take such a tour. Each point on the scale has an associated written description. The Juster Scale mean has been demonstrated to provide fairly accurate estimates of market size.

Exhibit 28 shows the findings. Two figures are shown for each type of tour. The maximum potential represents the proportion who would not totally rule out going on such a tour; in other words there is a slight or stronger possibility that they might do so (a rating of 1 or higher). The second figure is the best estimate of potential market demand (given "full" information about the region) derived from the scale mean.

Exhibit 28: Chances of taking escorted tours in the Canadian Badlands with interpretation offered by a knowledgeable guide (n=1400)



Multi-day motorcoach tours

In the case of multi-day motorcoach tours into the Canadian Badlands from a major center in Alberta, it is estimated that 20% of the market surveyed would be interested in participating, with a maximum of 63% being willing to contemplate such an excursion. Differences in interest between groups examined in the survey were most distinctive by experience cluster, as follows:

- 31% of the Up for Anything cluster would take a motorcoach tour, followed by 24% of Outdoor Enthusiasts. The latter finding is intriguing since the cluster is predominantly young, with families and tends to be more male, demographics not typically associated with such tours. Because of their predominant interest in sports activities and weekend trips, it is possible that there may be demand for themed activity tours. On the other hand, the cluster is also interested in kid-oriented activities of all kinds, so there may be potential for an educational and fun approach dedicated to the younger age group.

  The result for the Up for Anything cluster is consistent with their profile, as is the finding that Not for Me members had the lowest interest in a motorcoach tour (10%);
- Real Relaxers were less interested than the other traveler segments (16%);
- Interest increased with decreasing income (from 15% in the highest income group to 24% in the lowest) and, to a lesser degree, with decreasing education (16% among university educated to 23% with a high school education);
- Females were more interested than males (22% vs. 18%);
- Saskatoon residents were the most interested (23%) and Vancouverites the least (16%). Location was not a strong differentiator as all other centers were at 20%. It should be noted that the decision to suggest that the tour would start in Alberta was primarily based on focus group feedback relating to minimizing travel costs by driving to Alberta themselves (which is consistent with the income profile identified above) along with practical advantages of the potential for aggregation.

Local half or one day bus tour

The second type of tour, a local one day or half day bus tour starting in the region would appeal to a maximum of 74% of the market, and potentially attract 27% of visitors to the region. This number is higher than for multi-day motorcoach tours and the focus groups provide an explanation. A one day or half day tour is less risky if people are not sure whether they will enjoy the experience. It provides greater flexibility to do things they want to do rather than follow a longer tour schedule that they might not enjoy. It allows them to focus on just the site or theme of interest, for example, aboriginals, ruins/historic sites or ghost stories. It is also cheaper.

- The same psychographic patterns were evident as for multi-day motorcoach tours: 38% of Up for Anythings and 32% of Outdoor Enthusiasts were above average in interest while only 11% of Not for Me's would go on a day tour in the region;
- Real Relaxers were less interested (23%);
- Women were more interested than men (29% vs. 25%);
- While Young Families and Mature Families/Singles were not significantly different, more finely tuned lifestage differences were found. Both pre-school and older singles/groups (30%) had higher than average interest;
- The high income group was less likely to take such a tour (21%), even less likely than Vancouver residents (23%), while Saskatoon remained more enthusiastic (31%).

A guided walk with an interpreter

The final escorted tour examined was a guided walk with an interpreter. This was most popular of all, with 81% willing to consider it and 33% making up the potential market. One comment in a focus group, which was made relative to the interpretive tour at the Atlas Coal Mine Historic Site, helps to understand the appeal of this type of tour. The comment was: "A lot of these things you need a tour guide or you wouldn't know what you were looking at anyway".

There were more differentiating factors than for the other tour types:

- Up for Anything were far and away most likely to take a guided walk (46%), followed by Outdoor Enthusiasts and the History and Nature cluster (both 40%). High Life Seekers (23%) and Not for Me's (12%) were much less interested, while the final cluster, the Fossil Focused, were average (33%);
- Among the traveler segments, Accomplishers were more enthused (37%) and Real Relaxers less so (32%);
- Regional Explorers, the cluster of recent Canadian Badlands visitors that already has the most intimate knowledge of the region, were most interested of all (48%). In fact, interest increased with increasing familiarity with the Canadian Badlands, with increasingly favorable overall opinions of it and with increasing recency of the last trip, suggesting that the more one knew about it, the higher the awareness of how much there is to be learned in the region;
- Demographically, a higher proportion of the Young Families market than Mature Families/Singles were interested in a guided walk (37% vs. 31%) and this applied to all age groups, pre-school to teen;
- Vancouver was the only geographic region to stand out, with fewer being likely to participate (27%).

Market potential

Overall projections

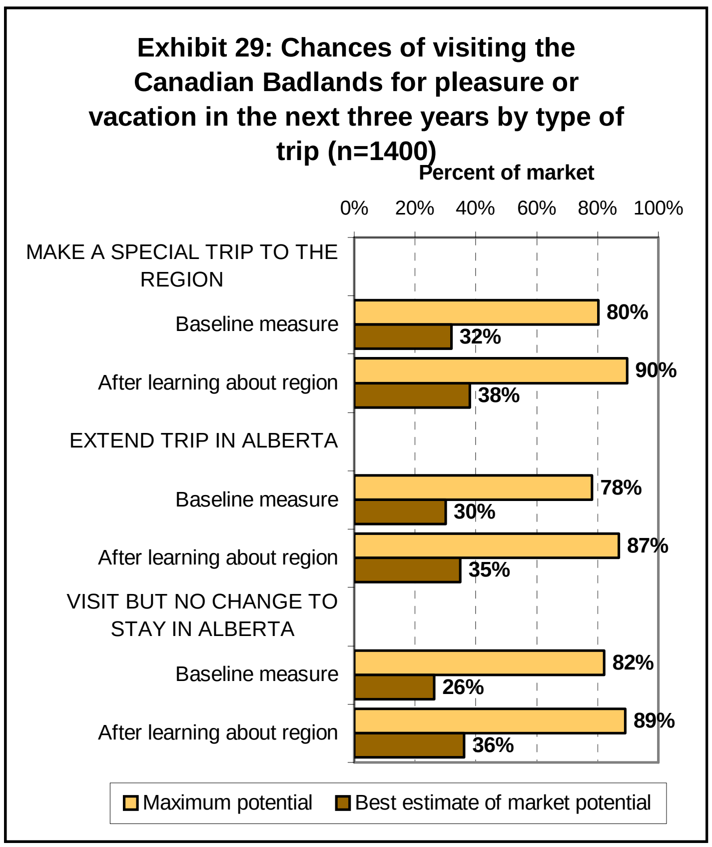
To establish the potential size of the market for the Canadian Badlands, the Juster Probabilistic Scale was again used. Immediately after seeing the map of the Canadian Badlands region, when they understood where it was and what locations were included, respondents were asked to rate their chances of visiting the Canadian Badlands in the next three years under three conditions relating to the degree of economic impact the visit would have. These were termed the baseline measures, because they were done without exposure to more and/or new information about what is actually available for a leisure traveler to experience there.

After exposure in the survey itself to more information about the region, including the perceptual statements, signature attractions and activities and the experiences they might be interested in, the question was repeated with a request to consider everything they had now seen and read about the Canadian Badlands. This design allowed market size to be estimated based on present knowledge and compared to what could be obtained if the market had greater knowledge of what is there. Part of the reason for taking this approach was the very enthusiastic response and heightened interest in visiting the region at the end of many focus groups as a result of what had been learned from the discussion and the materials (including the driving tours) examined.

The results are shown in Exhibit 29.

- The first scenario, which offers the greatest economic impact to the Province of Alberta and the Canadian Badlands region, was to **make a special trip to the region**. At baseline, 80% said they would consider doing this and after learning more about the region, 90% would not completely discount making such a trip.

  Market size was estimated pre-exposure at 32% and post-exposure at 38%, a 19% increase based solely on enriched information that



could be conveyed by effective marketing and education efforts.

- The second scenario also had economic impacts for both the province and the region, but less than a special trip, since it involved only an **extension to a trip** already being made in or through Alberta. 78% said they would consider this at baseline and 87% after learning more about the region.

  The best estimate of market size was 30% pre-exposure and 35% post-exposure, a 16% increase.

- The third scenario, which was to **visit the region but not change the length of the trip in Alberta**, would be revenue neutral for the Province, but might have an economic impact in the region. A maximum of 82% indicated they would consider this at baseline and 89% post-exposure.

  The best estimate of market size was 26% at baseline, rising to 36% with greater knowledge, a whopping 38% increment.

One of the interesting findings here is that the type of trip most likely to be made is one where the Canadian Badlands is the destination. Trip extension is the least likely action. Based on discussions in the focus groups, this may be because travel time is usually limited and people appear to prefer to maximize the time at their destination – especially when driving substantial distances – rather than to stop en route.

It would also appear that many new trips to the Canadian Badlands are likely to be substitutive, with a stay there rather than elsewhere in the province. For example, as described in a Winnipeg discussion, based on the new information they might choose to stay in Medicine Hat or Cypress Hills rather than heading directly to Calgary.

Finally, with 74% having already visited the Canadian Badlands and a maximum potential of up to 90%, there is only limited room to grow the market among non-visitors.

Accuracy of estimates

How accurate are these estimates? One way of validating the data is to consider what proportion of the market is already visiting the region. Earlier we saw that 49% had visited in the past five years, which would be an average of 10% per year. The baseline questions covered only a period of three years, which would mean that 29% (based on unrounded figures) had visited in the past three years.

Using an average of the three scenarios, the best estimate of potential visitation over the next three years at baseline was also 29%.[9] Since visit patterns would not be different from the past without something changing perceptions or desire to visit, one would expect the baseline measure to be similar to past behavior.

If we do the same calculation with the post-exposure figures, the best estimate of market size, with "full" information, is 36%, for an average 24% increase over three years resulting from having a new understanding of what the region has to offer.

Differences between different groups

Table 13 profiles the market for each of the scenarios based on the post-exposure data.

From this it is evident that:

- Some market segments consistently rated their chances of visiting the Canadian Badlands higher than others, no matter which scenario was under consideration. They were:
  - Edmonton, Calgary and Regina residents;
  - Young Families rather than Mature Families/Singles, including children of all ages, from pre-school to teen, with parents aged 25-34 or 35-44 years;
  - Accomplishers, due to a strong interest in visiting unfamiliar new places, more often rural destinations and in wishing to challenge themselves;
  - People who are Up for Anything, Outdoor Enthusiasts and those interested in History and Nature in the Canadian Badlands;
  - Regional Explorers and the Been There travel clusters.
- These segments showed a slightly higher level of interest in making a special trip to the region rather than extending a trip or replacing another Alberta destination;
- Of the high potential segments, those with the very highest propensity to visit were best defined by their interests and travel patterns in the Canadian Badlands and their geographic location;
- Some market segments consistently rated their chances of visiting the Canadian Badlands lower than others, for all scenarios. They were: the Not for Me experience cluster, Vancouver residents and people seeking Sun and Warmth on their vacations and leisure trips.

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9. The fact that the numbers are identical is coincidental since assumptions about annual visitation are made and there are alternative ways of computing baseline interest. The important point is that they are in the same ballpark

Table 13: Best estimate of potential market size for each scenario by geographic and demographic group and traveler segment (n=1400)

	Special trip %	Extend trip %	Substitutive Visit %
Total	**38**	**35**	**36**
Region			
Vancouver	27**	27**	27**
Kamloops/Kelowna	35	35	33
Edmonton	47*	38	42*
Calgary	52*	37	43*
Saskatoon	34	34	36
Regina	39	39*	39*
Winnipeg	33	34	34
Gender			
Male	37	33	36
Female	40	36*	37
Market			
Young Families	43*	39*	40*
Mature Families/Singles	34	32	34
Lifestage			
Pre-school family	43*	39*	40*
School-age family	43*	38	40*
Teen Family	41*	36	37
Grown Family	31	32	32
Empty nester	34	31**	34
Older singles/groups	36	33	33
Income			
Up to $40,000	39	37	36
Over $40,000 - $100,000	38	35	37
Over $100,000	37	32**	36
Education			
High school	38	36	37
Post-secondary	39	35	36
University	37	34	35
Traveler Segments			
Accomplishers	41	39*	40*
Urban Explorers	36**	34	35
Comfort Seekers	40	35	35
Real Relaxers	37	32	37

	Special trip %	Extend trip %	Substitutive Visit %
Canadian Badlands Experience Clusters			
History and Nature	44*	38*	39
High Life Escape	30	29	33
Up for Anything	51*	48*	44*
Fossil Focused	34	32	35
Outdoor Enthusiasts	49*	44*	44*
Not for Me	14**	14**	16**
General Destination Clusters			
BC Centric	41*	37	37
Sun and Warmth	34**	30**	31**
North Central	38*	35	36
Prairie Hearts	41*	37	40
Peripatetic	37	36	37
Canadian Badlands Travel Clusters			
Scratched the Surface	44	41	42
Southern Visitors	38**	38	39
Just Drumheller	45	35	41
Regional Explorers	60*	48*	49*
Been There	52*	42	48*

* Significantly higher than others in the same group ** Significantly lower than others in the same group

For the final analysis, high potential visitors (respondents who had a 60% or better chance of visiting the Canadian Badlands) were identified and their travel patterns compared to the low potential market. Members of this group:

- Were more likely to travel in Canada, western Canada and Alberta and Saskatchewan in particular, making more trips on average to Alberta, where they visited Alberta Central, Alberta South and the Canadian Rockies at a higher rate, with the difference being greatest for visits to Alberta South (47% vs. 28%). They were less likely to be visitors to the US Pacific region or Sun and Warmth cluster members;
- Traveled significantly more often in most months of the year. Between 25% and 30% took pleasure or vacation trips November through March (winter), from 35% to 45% from April to June and in September and October (shoulder), with two-thirds taking trips in July and August (summer). Their travel in Alberta showed a somewhat different pattern: 15% to 20% visited each month from October to May, 28% in June and approximately 50% in July and August;
- Resembled the total market in the length of trip taken most frequently (being most likely to take 3-7 day trips and weekend trips), with a higher proportion also taking occasional one to two week trips;

- Were more likely to travel most frequently either as a couple with children or alone with children;
- Were less likely to stay with friends and relatives as their most frequent form of accommodation, but did so more often on an occasional basis. Were particularly drawn by tenting in a campground and more often chose budget accommodations;
- Used more sources of information about a destination, with a higher rate of accessing a travel/auto association and picking up information at visitor centers and local tourism establishments; referred to their own experience and that of others; and used the Internet more often as a secondary source, especially provincial/destination websites;
- Were more familiar with the Canadian Badlands. However, the level of familiarity of high potential visitors was lower post-exposure than at baseline, indicating that some of the people interested in visiting after reading the survey material were initially less knowledgeable about the region;
- Had a far more favorable overall impression of the region from the start – and this changed only in a minor way with exposure to new information. In other words, even though improving knowledge increased interest in visiting, interest in visiting did not change if initial impressions were less favorable. This is likely to be due to general travel preferences and the appeal of the type of experience offered in the Canadian Badlands compared to what may be desired on a leisure trip or vacation (e.g., beach or large cities);
- Included a high proportion of more recent visitors to the Canadian Badlands, with two-thirds having visited in the past five years;
- These visitors were more likely to have already seen much of the region as they were overrepresented in the Regional Explorer and Been There clusters. Evidently they like what they know (Drumheller and Dinosaur Provincial Park in particular, also Cypress Hills Provincial Park, Stettler, Big Valley, Rosedale, Rosebud and East Coulee) and are ready for more. They were less likely to be drawn from the Southern Visitor cluster;
- Were more favorable in their views of all the individual perceptual dimensions tested. The largest differences were found in the belief that the region is fun for adults (in addition to being fun for children), is a comfortable/familiar place, includes interesting small towns and cities, has lots of interesting places to visit, beautiful scenery, unusual natural features and landscapes and unusual and rare attractions, activities and experiences;
- All signature attractions and activities displayed visually were rated as more attractive, except for golf which was rated the same by both more and less interested. The strongest differences were found for the Royal Tyrrell Museum and Dinosaur Provincial Park, followed by Writing-on-Stone Provincial Park, Cypress Hills Interprovincial Park and the Alberta Prairie Railway;
- Similarly, more high potential visitors expressed interest in almost all the experiences listed. The only exceptions were in not being significantly different to the low potential group on a resort, health/wellness spa, golfing, casino and motorcycling/bike rallies.

Of interest was the finding that the single strongest difference between the two groups was for museums/exhibits … and that this was also the item that gained most from baseline to post-exposure.

Items that showed the largest differences between low and high potential groups included: guided walks/hikes and interpretive programs in provincial parks, theme/amusement parks, natural wonders/panoramic views, wildlife/bird watching, aboriginal experiences, historic/archaeological/palaeontological sites, historic architecture/buildings/transportation, hiking/backpacking, performing arts, photography, star gazing/eclipse viewing/star parties, festivals/events, and a campground/RV park.

High potential visitors were more likely to belong to the History and Nature, Up for Anything and Outdoor Enthusiasts clusters and less likely to be Not for Me or High Life Escape cluster members;

- Had a much higher interest in taking a multi-day motorcoach tour (28% vs. 16%), a local bus trip (39% vs. 21%) and a guided walk with an interpreter (47% vs. 26%);
- Gained substantially in their interest in making a special trip to visit the region (from 55% pre- to 66% post-exposure), in extending a trip to or in Alberta to visit the region (48% to 57%), and in making a substitutive visit (50% to 57%).

A note on the traveler segments

A number of cluster analyses were run specifically for this survey as they provide a way of looking at the data in a multi-dimensional manner that is more informative than looking at each item in isolation. Each one of these (General Destination Clusters, Canadian Badlands Travel Clusters, Canadian Badlands Experience Clusters) has been fully analyzed under the relevant section.

An additional form of segmentation, referred to as the traveler segments, was developed in previous studies and describes motivations and values when traveling. These segments have been actively used for target marketing Alberta and the Canadian Badlands as tourism destinations (see Appendix II for a description). Any survey results that showed differences between the behavior, attitudes or interests of the four traveler segments have been included in the report under the question being analyzed. Given the importance of the segments in current marketing efforts, Table 14 pulls together key differentiators identified in this survey that distinguish between the different traveler segments.

These findings confirm that Accomplishers are the traveler segment most likely to be interested in visiting the Canadian Badlands as more of the available product appeals to them. However, they are also the greatest challenge as they typically travel well beyond Alberta's borders.

Table 14: Key differentiators between the traveler segments

	Accomplishers (n=236)	Urban Explorers (n=526)	Comfort Seekers (n=332)	Real Relaxers (n=306)
Motivations and values	*More:* ▪ Unfamiliar (83%) ▪ Do new things (73%) ▪ See new places (63%) ▪ Like to challenge myself (67%) ▪ Excitement (54%) ▪ City (33%) *Less:* ▪ Get away from daily routine (41%) ▪ Strengthen family bonds (38%) ▪ Have fun with friends (36%) ▪ Peace and quiet (8%)	*More:* ▪ City (100%) ▪ Excitement (65%) ▪ Strengthen family bonds (56%) ▪ Have fun with friends (55%) *Less:* ▪ Like to challenge myself (23%) ▪ Peace and quiet (8%)	*More:* ▪ Rural (83%) ▪ Tranquil (75%) ▪ Relax (71%) ▪ Familiar (70%) ▪ Strengthen family bonds (60%) ▪ Like to challenge myself (53%) ▪ Have fun with friends (52%) *Less:* ▪ Do new things (2%)	*More:* ▪ Tranquil (100%) ▪ Rural (83%) ▪ Familiar (72%) ▪ Peace and quiet (69%) *Less:* ▪ Carefully plan trip (61%) ▪ Strengthen family bonds (44%) ▪ Have fun with friends (29%) ▪ See new places (19%) ▪ Like to challenge myself (0%)
Geographic location	*Less:* ▪ Saskatoon (11%)	*More:* ▪ Regina (18%) *Less:* ▪ Calgary (11%)	*More:* ▪ Saskatoon (17%) *Less:* ▪ Regina (11%)	*More:* ▪ Calgary (19%) *Less:* ▪ Regina (10%)
Demographic characteristics	*More:* ▪ Male (54%) ▪ 35-44 (24%) ▪ Single/never married (9%) ▪ School-age households/youngest child 6-12 years old (23%) ▪ Income $70-$100K (30%) *Less:* ▪ Divorced (7%)	*More:* ▪ Female (54%) ▪ 25-34 (15%) ▪ Pre-school households (youngest child up to 5 years old (23%)	*More:* ▪ 35-44 (24%) *Less:* ▪ 45-49 (6%)	*More:* ▪ Mature Families/Singles (62%) *Less:* ▪ 35-44 (17%) ▪ Single parent family (5%)
North American destinations	*More:* ▪ Peripatetic (18%) ▪ US (60%), US Pacific (34%), US Mountain (28%) ▪ Elsewhere in the world (33%) ▪ In Canada: ON (30%) and NF (5%)	*More:* ▪ Sun and Warmth (25%) ▪ US (58%), US Pacific (31%)	*More:* ▪ Canada (95%), Western Canada (90%)	*More:* ▪ BC Centric (35%) ▪ Prairie Hearts (20%) ▪ Canada (95%), Western Canada (91%)

	Accomplishers (n=236)	Urban Explorers (n=526)	Comfort Seekers (n=332)	Real Relaxers (n=306)
	Less: ▪ Prairie Hearts (11%) ▪ Western Canada (83%)	*Less:* ▪ Western Canada (81%)		*Less:* ▪ Sun and Warmth (17%) ▪ ON (16%) ▪ US Pacific (21%), US Mountain (16%), US West North Central (11%), US South (9%)
MOST FREQUENT: **- Trip length**	*More:* ▪ Longer than two weeks (10%) *Less:* ▪ Weekend trip (30%)	*Less:* ▪ Longer than two weeks (2%)	*More:* ▪ Weekend trip (40%) *Less:* ▪ Longer than two weeks (3%)	*More:* ▪ Longer than two weeks (8%)
- Travel party				*Less:* ▪ Couple with children (21%)
- Accommodation	*More:* ▪ Budget hotel/motel (11%) *Less:* ▪ Private home (24%)	*More:* ▪ Moderately priced hotel/motel (33%) *Less:* ▪ Campground/RV park (5%) ▪ Rented cottage/cabin (1%)	*More:* ▪ Rented cottage/cabin (3%) *Less:* ▪ Luxury hotel (3%)	*More:* ▪ Campground/RV park (21%) *Less:* ▪ Moderately priced hotel/motel (13%) ▪ Budget hotel/motel (4%)
- Information source	*More:* ▪ Internet (34%), destination websites (17%), travel sites like Expedia (16%) *Less:* ▪ Friends or family (19%) ▪ Own past experience (14%)	*More:* ▪ Internet travel sites like Expedia (14%) *Less:* ▪ Own past experience (16%)	*Less:* ▪ Internet travel sites like Expedia (8%)	*More:* ▪ Own past experience (30%) ▪ Friends or family (26%) *Less:* ▪ Internet (22%), property websites (4%), travel sites like Expedia (8%) ▪ Travel/auto association (6%)
Alberta trips	*More:* ▪ Calgary and Area (58%) *Less:* ▪ Trips (average 3.5)	*More:* ▪ Trips (average 6.4) ▪ Calgary and Area (59%) ▪ Edmonton and Area (45%) *Less:* ▪ Canadian Rockies (32%)	*Less:* ▪ Edmonton and Area (34%)	*More:* ▪ Trips (average 6.4) ▪ Canadian Rockies (48%) *Less:* ▪ Calgary and Area (42%) ▪ Edmonton and Area (33%)

	Accomplishers (n=236)	Urban Explorers (n=526)	Comfort Seekers (n=332)	Real Relaxers (n=306)
Canadian Badlands Familiarity and Favorability (average, 5=max.)	▪ Higher familiarity (3.23) ▪ Higher favorability (4.04)	▪ Lower familiarity (2.94) ▪ Lower favorability (3.73)	▪ Higher favorability (3.94)	▪ Lower favorability (3.76)
Last visit		▪ Never been there (28%)	▪ Never been there (27%)	
Places visited	*More:* ▪ Southern Visitors (36%) ▪ Brooks (27%) ▪ Delia (5%) *Less:* ▪ Hwy 2 (20%) ▪ Hwy 4 (2%) ▪ Hwy 9 (17%) ▪ Hwy 11 (4%) ▪ Hwy 21 (8%)	*More:* ▪ Scratched the Surface (36%) *Less:* ▪ Brooks (18%) ▪ Dinosaur Provincial Park (13%) ▪ Regional Explorers (9%) ▪ Beiseker (4%) ▪ Rosebud (4%) ▪ Hwy 23 (2%)	*More:* ▪ Regional Explorers (16%) ▪ Rosebud (13%) *Less:* ▪ Southern Visitors (21%)	*More:* ▪ Regional Explorers (17%) ▪ Been There (15%) ▪ Hwy 2 (31%) ▪ Hwy 9 (28%) ▪ Hwy 21 (15%) ▪ Hwy 11 (12%) ▪ Hwy 4 (7%) ▪ Hanna (17%) ▪ East Coulee (10%) *Less:* ▪ Southern Visitors (22%)
Perceptions (average, 5=max.)	*More:* ▪ A place where you learn (4.20) ▪ Offers unusual, rare attractions/ activities/experiences (4.07) ▪ Has beautiful scenery (4.23) ▪ Lots of interesting places to visit (4.01) ▪ You can see lots of wildlife and birds (3.82)	*Less:* ▪ A place where you learn (4.04) ▪ Lots of interesting places to visit (3.86)	*More:* ▪ You can see lots of wildlife and birds (3.81) ▪ Good hospitality services (3.71) ▪ Rich in the arts (3.40)	*Less:* ▪ Has beautiful scenery (4.04) ▪ A place where you learn (4.03) ▪ Lots of interesting places to visit (3.86) ▪ Fun for children (3.83) ▪ Fun for adults (3.68) ▪ You can see lots of wildlife and birds (3.63) ▪ Lots of different recreational activities (3.49)

	Accomplishers (n=236)	Urban Explorers (n=526)	Comfort Seekers (n=332)	Real Relaxers (n=306)
				▪ Opportunities to learn about Aboriginal culture (3.47) ▪ Rich in the arts (3.19) ▪ Enough to do at night (3.13)
Signature attractions and activities (average, 4=max.)	*More*: ▪ Royal Tyrrell Museum (3.18) ▪ Dinosaur Provincial Park (3.14) ▪ Writing-On-Stone Provincial Park (2.97) ▪ Cypress Hills Interprovincial Park (2.72) ▪ Blackfoot Crossing Historic Site (2.24) ▪ Horseback Riding (2.03)	*Less*: ▪ Royal Tyrrell Museum (2.93) ▪ Writing-On-Stone Provincial Park (2.78) ▪ Cypress Hills Interprovincial Park (2.50) ▪ Blackfoot Crossing Historic Site (2.03)	*More*: ▪ Cypress Hills Interprovincial Park (2.65) ▪ Atlas Coal Mine Historic Site (2.24)	*Less*: ▪ Dinosaur Provincial Park (2.77) ▪ Writing-On-Stone Provincial Park (2.75) ▪ Atlas Coal Mine Historic Site (2.08) ▪ Blackfoot Crossing Historic Site (2.07)
Experiences	*More*: ▪ Outdoor Enthusiasts (16%) ▪ Guided walks/hikes/ interpretive programs at provincial parks (48%) ▪ Natural wonders and panoramic views (78%) ▪ Lovely scenery (70%) ▪ Historic architecture/buildings, forms of transportation (62%) ▪ Photography (46%) ▪ Cycling, mountain biking (40%) ▪ Hiking, backpacking (40%) ▪ Water-based activities (35%) ▪ Hot air balloon rides, helicopter tours (31%) ▪ Guest/dude ranch, trail rides, stock drives (30%)	*More*: ▪ Shopping and browsing (55%) ▪ Health and wellness spa (32%) ▪ Casino (26%)	*More*: ▪ Peace and quiet (66%) ▪ Cottages/cabins (48%) ▪ Water-based activities (33%) ▪ Geocaching (19%)	*More*: ▪ Peace and quiet (73%)

	Accomplishers (n=236)	Urban Explorers (n=526)	Comfort Seekers (n=332)	Real Relaxers (n=306)
	Less: ▪ High Life Escape (13%) ▪ Not for Me (7%) ▪ Peace and quiet (60%) ▪ None (1%)	*Less:* ▪ History and Nature (18%) ▪ Outdoor Enthusiasts (8%) ▪ Lovely scenery (60%) ▪ Historic sites, palaeontological/ archaeological sites (59%) ▪ Peace and quiet (57%) ▪ Photography (37%) ▪ Star gazing, eclipse viewing, star parties (34%) ▪ Wildlife spotting and viewing, bird watching (31%) ▪ Aboriginal experiences, attractions or activities (31%) ▪ Horseback riding (28%) ▪ Campground/RV park (26%) ▪ Wildflowers/flora viewing (23%) ▪ Water-based activities (22%) ▪ Guest/dude ranch, trail rides, stock drives (22%) ▪ Hunting (4%)	*Less:* ▪ Hiking, backpacking (32%) ▪ Cycling, mountain biking (21%)	*Less:* ▪ Up for Anything (14%) ▪ Theme and amusement parks (30%) ▪ Performing arts, indoors or outdoors (25%) ▪ Health and wellness spa (25%) ▪ Hot air balloon rides, helicopter tours (20%)
Escorted tours	*More:* ▪ A guided walk with an interpreter (37%)	*Less:* ▪ A guided walk with an interpreter (32%)		*Less:* ▪ Multi-day motorcoach tour starting in a city in Alberta (16%) ▪ A local one day or half day bus tour starting in the area (23%) ▪ A guided walk with an interpreter (32%)
MARKET POTENTIAL - at Baseline	*More:* ▪ *Making a special trip to the region (35%)* ▪ *Extending your trip in Alberta to visit the region (34%)* ▪ *Visiting the region but not changing the length of your trip in Alberta (36%)*			*More:* ▪ *Visiting the region but not changing the length of your trip in Alberta (34%)*

	Accomplishers (n=236)	Urban Explorers (n=526)	Comfort Seekers (n=332)	Real Relaxers (n=306)
		Less: ▪ *Making a special trip to the region (30%)* ▪ *Extending your trip in Alberta to visit the region (29%)* ▪ *Visiting the region but not changing the length of your trip in Alberta (30%)*	Average: ▪ *Making a special trip to the region (33%)* ▪ *Extending your trip in Alberta to visit the region (30%)* ▪ *Visiting the region but not changing the length of your trip in Alberta (32%)*	Less: ▪ *Extending your trip in Alberta to visit the region (29%)* Average: ▪ *Making a special trip to the region (32%)*
- Post-exposure	More: ▪ *Making a special trip to the region (41%)* ▪ *Extending your trip in Alberta to visit the region (39%)* ▪ *Visiting the region but not changing the length of your trip in Alberta (40%)*	Less: ▪ *Making a special trip to the region (36%)* ▪ *Extending your trip in Alberta to visit the region (34%)* ▪ *Visiting the region but not changing the length of your trip in Alberta (35%)*	Less: ▪ *Visiting the region but not changing the length of your trip in Alberta (35%)* Average: ▪ *Making a special trip to the region (40%)* ▪ *Extending your trip in Alberta to visit the region (35%)*	More: ▪ *Making a special trip to the region (40%)* Less: ▪ *Extending your trip in Alberta to visit the region (32%)* Average: ▪ *Visiting the region but not changing the length of your trip in Alberta (37%)*

Conclusion

We are pleased to have had the opportunity to conduct research to gain a greater understanding of the behavior, perceptions and interests of western Canadian leisure travelers who have visited the Canadian Badlands in the past and who might do so in the future.

The survey described the destinations – and types of destinations – favored by the regional market and their usual and occasional travel patterns, including month of travel, trip duration, travel party composition, accommodation and information source use. Familiarity with the Canadian Badlands was established, along with overall and detailed impressions of what it has to offer. This established that there is high awareness of the name, but that few people felt they knew a lot about the region. Nevertheless, it was seen to offer two distinctive and exceptional defining features: unusual natural features and landscapes, and legendary dinosaurs.

A multi-faceted picture of current visitors to the region was generated that included comprehensive data on places in the Canadian Badlands visited in the past. These not only form a baseline measure against which future studies can assess change in visitation to different places in the region, but offer insight into travel patterns in and through it. It was evident that a large proportion of the market surveyed has been to the region in the past five years. However, there are northern and southern components to the region which currently attract different visitors based on their geographic location, knowledge of and interest in the resources available. It includes a significant pass-through segment.

A thorough analysis of the attractions, activities and experiences of interest in the region identified the types of travelers who are or will be interested in the Canadian Badlands and those who won't. Finally, assessments of maximum potential market size and an estimate of the market that can be attained with greater information about what the region has to offer were prepared. Distinguishing characteristics of high potential visitors were identified on geographic, demographic, psychographic and behavior criteria.

We trust that this abundance of information about the western Canadian market and its attitudes to and relationships with the Canadian Badlands will be put to good use to enhance the success of your marketing and development efforts.

INFACT RESEARCH AND CONSULTING INC.

Enid Markus
President
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Appendix I:
Sample description

Sample response and incidence rates

A total of 28,846 invitations to participate were sent out, with responses being received from 3,867 panel members, for an average response rate of 13%.

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

1,472 of those who responded were screened out because they did not meet specific sample criteria and 998 were rejected as the quotas were full. 1,403 completed the survey. The total incidence rate was 36%. Due to the finer targeting by Openvenue, as well as response blocking from duplicate listings between panels, OpenVenue's incidence rate was 42%, compared to 19% from the two other panels.

An additional 78 were screened out for technical reasons (unable to support the flash tools used in the survey); they are not considered in the incidence figures, but if they were, they would make up only 2% of all those responding, making the addition of these interesting and helpful interactive approaches well worthwhile.

In all, 2,875 panel members were fully screened online. Respondent distribution was as follows:

Disqualified	%
Not a household head	3.6
Not in correct age group (i.e. under 25 or over 69 years)	0.2
Not a family with children under 18 years (Young Families only)	11.2
Not in geographic market (defined by postal code)	20.3
Have not traveled overnight for pleasure in the past three years	12.1
Traveled only outside Canada and the US in the past 3 years	3.8
Qualified and complete	**48.8**

Unweighted and weighted sample profiles

The table below profiles the achieved or unweighted sample (un), and the final weighted distribution (n). The weighted sample is the same as the estimated target population distribution in each geographic market, based on data published by Statistics Canada for Census 2001. This is the most recent date for which detailed household composition information is currently available.

Profile of the unweighted and weighted sample

	Achieved sample (un=1403) %	Weighted sample (n=1400) %
Vancouver		
Young Families	50	38
Mature Families/Singles	50	62
Males	50	50
Females	50	50
Kamloops/Kelowna		
Young Families	49	39
Mature Families/Singles	51	61
Males	40	50
Females	60	50
Edmonton		
Young Families	50	44
Mature Families/Singles	50	56
Males	50	50
Females	50	50
Calgary		
Young Families	50	46
Mature Families/Singles	50	54
Males	50	50
Females	50	50
Regina		
Young Families	51	47
Mature Families/Singles	49	53
Males	42	50
Females	58	50
Saskatoon		
Young Families	48	44
Mature Families/Singles	52	56
Males	43	50
Females	57	50
Winnipeg		
Young Families	50	41
Mature Families/Singles	50	59
Males	50	50
Females	50	50

Appendix II: Traveler segments

Traveler segments

The four traveler segments are an established means of dividing the population of travelers. Travel Alberta In-Province has been using this approach for marketing to regional visitors for several years and Canadian Badlands Ltd. embraced it in their marketing plan (*Marketing Plan 2007*), targeting Accomplishers in their initial marketing strategy:

> The decision to select Accomplishers stems from the "newness" of the initiative itself. While independently the activities and attractions in the Canadian Badlands may not be new, the combination of experiences is, and this is the first time that this concept has been presented. The Accomplishers market will respond to this positioning and will become the "early adopters". As they experience and enjoy what the Canadian Badlands has to offer, this group will promote their experiences to others. They'll "tell two friends" and "they'll tell two friends" and so on...

It was felt that Comfort Seekers would form a secondary target market: "Comfort Seekers will also find the variety and the rural appeal attractive … As this group sees and hears more about the region it becomes more familiar to them. Familiarity is a motivator for this group and takes time to establish".

The four segments are described in the marketing plan as follows. This information is reproduced here to provide the necessary background to understanding the findings of the present study:

- Accomplishers: 28% of market; desire unfamiliar places to visit and new things to do.
- Comfort Seekers: 24% of market; strong preference for familiar and rural locations, desire relaxation and strengthening family bonds.
- Real Relaxers: 27% of market; desire tranquility and some peace and quiet, prefer to do nothing.
- Urban Explorers: 21% of market; seek to get away from daily routine and see new places (preferably exciting, city locations).

Accomplishers - Your adventure awaits. Accomplishers are looking for new and unfamiliar places to visit and new things to do. They enjoy action and excitement. They are focused on their own enjoyment and accomplishments. Regardless of where they live, Accomplishers typically spend more money on travel annually. They tend to be married and not to have children living at home (under 18), and have an average age of 44 years (across all three provinces). Accomplishers spend the most time planning their vacations and use the Internet as a primary source of information.

Accomplishers pose the biggest challenge, as they also enjoy going to BC and in the case of Alberta and BC Accomplishers actually consider Alberta and BC for future trips about the same. BC Accomplishers, although they consider Alberta, tend to stay in BC. There is an opportunity for SK Accomplishers as they consider and take most trips within Alberta currently. Like other segments, Saskatchewan residents are very loyal to Alberta.

Comfort Seekers - Home away from home. Comfort Seekers are looking for something that Alberta provides bountifully: familiar and relaxing locations, away from the city. They want to reconnect with family and friends and strengthen relational bonds.

Comfort Seekers want to ensure everyone in their group has a good time and therefore enjoy a variety of activities while traveling. They research their trip thoroughly, in many cases as a family, and rely heavily on past experience and word of mouth. They also use the Internet to plan (around 78%) and spend on average 5 hours planning. They need lots of detailed information, as they want to make sure that everyone will have a good time and make the best use of their time.

Comfort Seekers are the "bread and butter" of the Alberta tourism industry. They are families with children under 18 that travel predominantly in the summer months and other school breaks. The average age is 44 years old (across all three provinces). As noted, with the exception of BC residents, Alberta is currently, and for future consideration, the destination of choice for this segment. They are budget conscious and value for money is an important motivator in destination choice.

Real Relaxers - Peace and Tranquility. Real Relaxers are also looking for destinations that Alberta provides in abundance: locations and opportunities to relax and to find peace, rest, and tranquility. They prefer to unplug and unwind during their holidays and are less focused on any specific activities. They of course do enjoy a variety of activities, but it is not the focus of their holiday.

Real Relaxers are the oldest segment with an average age of 46 years and the highest proportion of those over the age of 50 (37%). They typically do not have children under the age of 18 living in their household (most likely they are empty-nesters), but are married. They are the one segment most likely to travel to the U.S. or sun destinations (snow-birds) and are also the most likely to own a private cabin/cottage. Because this group does not like to take the time to plan vacations, they are also the most likely to book quick, easy, and all-inclusive packages to other destinations.

This is the segment with the least long-term potential growth because it spends the least amount of money annually on travel and because they tend to return to the same place they last visited. However, because they are loyal, if you can convince them to go to the destination and have a great experience, then they are liable to return.

Again, with the exception of BC residents, this segment enjoys Alberta as a travel destination and considers it for future travel. BC residents, as in all other segments, are more loyal to their own province for travel.

Urban Explorers - Savour the City. Urban Explorers are seeking to get away from the daily routine and see new places, preferably exciting, city locations. They enjoy a variety of activities as well, especially cultural activities and events, indoor leisure activities such as dining, casinos, and shopping, and just exploring different things that cities offer.

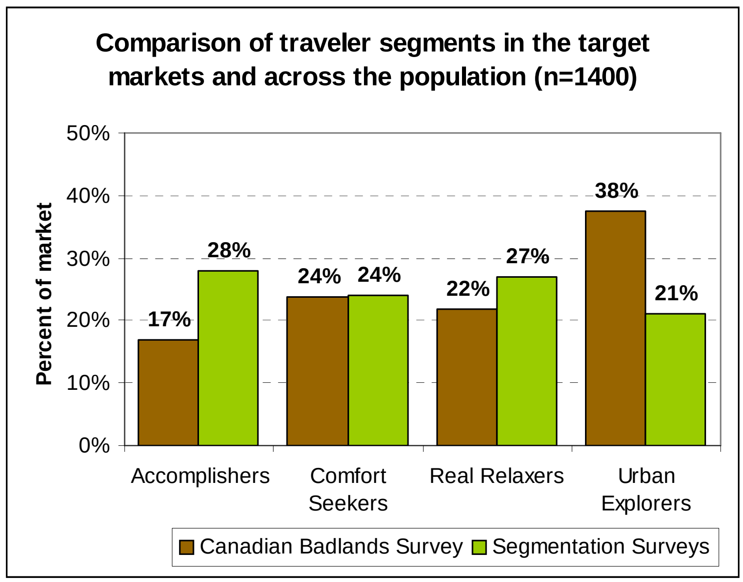
This segment tends to be younger, with almost half (48%) under the age of 40. They are typically married but do not have children under 18. They spend a significant amount of money annually on travel and enjoy travel destinations to the US.

Although this segment does not typically travel in Alberta, it does provide long-term growth potential. This segment should be the focus for any activity related to the Gateway Strategy created by Edmonton and Calgary. For both cities, the festivals and other events, shopping and nightlife are a strong attraction for this segment, in Alberta and Saskatchewan especially.

And when examining Urban Explorers in Saskatchewan specifically, we see that Saskatchewan Urban Explorers are the highest proportion of the province (29%) and have a strong propensity to travel to Alberta.

The above information was derived from telephone surveys of the four traveler segments in Alberta, British Columbia and Saskatchewan, conducted among the total adult population. The present survey differs in four ways.

- Firstly, it was a survey of household heads in two distinct demographic market groups making up just 50% of all households. More specifically, it excluded non-family households with household heads aged 25-49 and households headed by anyone under the age of 25 or over the age of 69. It also excluded non-household heads (e.g., adult children living with their parents, aged parents living with their children's families).
- Secondly, the short form classification method is not perfect. Average classification accuracy with this method has been assessed at 69%.
- Thirdly, it was an online rather than a telephone survey.
- Fourth, the questions were asked in relation to trips lasting one or more nights – the subject of this survey – rather than 3-7 days.



Because of one or more of these differences, segment distribution was not the same in the Canadian Badlands survey as in the original segmentation research. The graph and table which follow show that the primary target traveler segment, Accomplishers, was underrepresented in the present survey. At the same time, Urban Explorers – who are not a preferred target segment for the Canadian Badlands – were over-represented. This was true for the survey overall and for almost all geographic areas individually.

A review of available life stage information from the original surveys confirms that one reason for the difference lies in the market definition.

In the original surveys, in Alberta (32%), Saskatchewan (30%) and British Columbia (37%) only approximately one-third of Accomplishers had children under the age of 18 years in the segmentation surveys. By definition, in the Canadian Badlands survey, the Young Families target market group aged 25-49 had to have children under the age of 18 years (i.e., 100%). As a result, a younger cohort without children was excluded from the survey altogether, which would have seriously impacted the presence of Accomplishers in the sample.

On the other hand, Urban Explorers also tended to be younger and less likely to have children under the age of 18 (though not to the same degree), yet they were the largest segment in the survey in every location.

Within and between segments, the behavior profiles found in the Canadian Badlands survey were similar to those found in the initial investigations. For example, Urban Explorers were significantly more prevalent in the two Saskatchewan locations (see Table below), and the older Mature Families/Singles group were more likely to be Real Relaxers (24% vs. 19% of Young Families) – findings similar to the original segmentation surveys.

Segment distribution by geographic market (n=1400)

<table>
<tr><th></th><th>Total %</th><th>Vancouver %</th><th>Kamloops/ Kelowna %</th><th>Edmonton %</th><th>Calgary %</th><th>Saskatoon %</th><th>Regina %</th><th>Winnipeg %</th></tr>
<tr><td>Accomplishers
Canadian Badlands Survey</td><td>17</td><td>16</td><td>18</td><td>15</td><td>17</td><td>13</td><td>19</td><td>21</td></tr>
<tr><td>Segmentation Surveys</td><td>28</td><td>34</td><td>29</td><td colspan="2">29</td><td>19</td><td>23</td><td>n.a.</td></tr>
<tr><td>Comfort Seekers
Canadian Badlands Survey</td><td>24</td><td>23</td><td>28</td><td>22</td><td>25</td><td>22</td><td>19</td><td>28</td></tr>
<tr><td>Segmentation Surveys</td><td>24</td><td>19</td><td>22</td><td colspan="2">22</td><td>26</td><td>23</td><td>n.a.</td></tr>
<tr><td>Real Relaxers
Canadian Badlands Survey</td><td>22</td><td>20</td><td>21</td><td>27</td><td>29</td><td>21</td><td>16</td><td>19</td></tr>
<tr><td>Segmentation Surveys</td><td>27</td><td colspan="2">26</td><td colspan="2">23</td><td colspan="2">24</td><td>n.a.</td></tr>
<tr><td>Urban Explorers
Canadian Badlands Survey</td><td>38</td><td>41</td><td>34</td><td>36</td><td>29</td><td>44</td><td>47</td><td>33</td></tr>
<tr><td>Segmentation Surveys</td><td>21</td><td colspan="2">22</td><td colspan="2">26</td><td colspan="2">29</td><td>n.a.</td></tr>
</table>

n.a. Not available as a defining survey has not been conducted in Winnipeg.

There were a few other differences of note in the current study. Women had a higher propensity to be Urban Explorers (41% vs. 35% of men) and school age families (i.e., with the youngest child aged 6 to 12 years) were more often Accomplishers (23% vs. 17% overall).

Expected similarities in behavior are evident from the discussion in the main body of the report. It is primarily their presence in the population that is different and that was influenced, to a greater or lesser degree, by definitional target market differences.

Appendix III: Questionnaire

Canadian Badlands: Final Questionnaire

1. Are you the:

   Male head of your household
   Female head of your household
   Not a household head TERMINATE

2. Which age category do you fit in:

   Up to 24 TERMINATE
   25-34
   35-44
   45-49
   50-54
   55-64
   65-69
   70 and over TERMINATE

FOR AGE 25-49

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

   One person TERMINATE
   A couple TERMINATE
   A two-parent family with one or more children under 18 at home
   A single-parent family with one or more children under 18 at home
   Something different TERMINATE

FOR AGE 50-69

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

   One person
   A couple
   A two-parent family with one or more children under 18 at home
   A single-parent family with one or more children under 18 at home
   Something different

5. Which of the following best describes your marital status:

   Single, that is, never married
   Married or living together as a couple
   Widowed
   Separated
   Divorced

6. What are the first three digits of your postal code?

   ☐ ☐ ☐ VALIDATE

ASK IF RURAL FSA: (Display respondent's FSA):

7. What are the last three digits of your postal code?

☐ ☐ ☐ ☐ ☐ ☐ TERMINATE IF OUTSIDE REGION

8. Have you taken any out-of-town trips of one or more nights away from home, for vacation or pleasure, in the past 3 years – that is, since November 2004?

   Definition of Out-Of-Town Pleasure or Vacation Trips:
   These include short get-away trips, longer vacation trips, trips to a cottage or country home and out-of town trips to visit family or friends

   Yes No IF NO - TERMINATE

9. Where have you travelled on the vacation or pleasure trips of one or more nights you took in the past 3 years? *Check all that apply*

   Canada
   United States
   Elsewhere in the world TERMINATE IF ELSEWHERE ONLY

10. Which provinces and/or states did you visit on the vacation or pleasure trips of one or more nights you took in the past 3 years? *Check all that apply* SHOW REGIONS VISITED IN Q9

Canada:

Newfoundland and Labrador	New Brunswick	Saskatchewan	Northwest Territories
Prince Edward Island	Quebec	Alberta	Nunavut
Nova Scotia	Ontario	British Columbia	
	Manitoba	Yukon	

United States:

Alabama	Indiana	Nebraska	South Carolina
Alaska	Iowa	Nevada	South Dakota
Arizona	Kansas	New Hampshire	Tennessee
Arkansas	Kentucky	New Jersey	Texas
California	Louisiana	New Mexico	Utah
Colorado	Maine	New York State	Vermont
Connecticut	Maryland	North Carolina	Virginia
Delaware	Massachusetts	North Dakota	Washington DC
Florida	Michigan	Ohio	Washington State
Georgia	Minnesota	Oklahoma	West Virginia
Hawaii	Mississippi	Oregon	Wisconsin
Idaho	Missouri	Pennsylvania	Wyoming
Illinois	Montana	Rhode Island	US Territories/islands (specify)

11. In which month/s did you visit these provinces/states on vacation or pleasure trips of one or more nights in the past 3 years? *Please check all that apply* SHOW DESTINATIONS VISITED IN Q10

January February March April May June July August September October November December

IF DID NOT VISIT British Columbia, Alberta, Saskatchewan or Manitoba in Q10: SKIP TO Q19

13. How long were the vacation or pleasure trips of one or more nights you took in western Canada (British Columbia, Alberta, Saskatchewan and/or Manitoba) during the past 3 years? What was the most frequent length? Any others taken?

Please select one for 'Most frequent' and check all that apply for 'All others'

Weekend trip (2 days)
3 to 7 day trip
One to two weeks
Longer than two weeks
No other length

14. Who did you travel with most often on the vacation or pleasure trips of one or more nights you took in western Canada during the past 3 years? Any others?

Please select one for 'Most frequent' and check all that apply for 'All others'

By yourself
Yourself and children
Yourself and adult friends
Yourself and adult relatives
Yourself and children and friends
Yourself and children and relatives
As a couple
As a couple with children
As a couple with adult friends
As a couple with adult relatives
As a couple with children and friends
As a couple with children and relatives
Other (specify)
No other combinations

15. What type of accommodation did you stay in most often on vacation or pleasure trips of one or more nights in western Canada during the past 3 years? Any others used?

Please select one for 'Most frequent' and check all that apply for 'All others'

Resort
Luxury hotel
Moderately priced hotel/motel
Budget hotel/motel
Tenting in a campground
RV park
Home of friends or relatives
Bed & Breakfast
Cottage/cabin you or someone you know owns
Rented cottage/cabin
Guest ranch
Condo with kitchen/cooking facilities
Roadside or pull-out
Other (please specify)
No other types

16. What sources did you use most often to obtain information about a destination on your vacation or pleasure trips of one or more nights in western Canada during the past 3 years? Any others used?

Please select one for 'Most frequent' and check all that apply for 'All others'

- Tourism destination bureaus (provincial or local)
- A travel association (e.g., CAA, AMA, BCAA)
- Visitor information centers going into a province or at the destination
- Hotels/motels, campgrounds, retail stores, gas stations, restaurants, attractions
- Roadsigns/billboards
- Airport/bus depot/train station
- Newspapers
- Magazines
- Radio
- Television
- Books
- Internet – travel sites like Expedia, Travelocity, Orbitz etc.
- Internet – provincial or destination tourism bureau websites
- Internet – hotel, car rental, etc. websites
- Consumer shows (e.g., home and garden show)
- Travel agents/tour operators
- Friends or family
- Own past experience
- Other (please specify)
- None/no others

IF DID NOT VISIT Alberta in Q10: SKIP TO Q19

17. How many vacation or pleasure trips of one or more nights did you take in Alberta in the past 3 years? *Please write in the number*

18. What part or parts of Alberta did you visit on vacation or pleasure trips of one or more nights in the past 3 years? *Please refer to the map below before answering. Check all that apply. You can use the magnifying glass to look at the map in greater detail.*

    Tourism Destination Region map with magnifying glass

    - Alberta Central
    - Alberta North
    - Alberta South
    - Calgary and Area
    - Canadian Rockies
    - Edmonton and Area
    - Unsure of region (specify destination name)

19. From the following list, please select the <u>three</u> most important reasons you have for taking vacation or leisure trips of one or more nights. RANDOMIZE ORDER

    To get away from the daily routine
    To strengthen our family bonds
    To relax
    To do things that I've never done before
    To see new places
    For some peace and quiet
    To have fun with friends

20. Which one word in each pair best describes your destination preference when thinking about your vacation or leisure trips of one or more nights? RANDOMIZE ORDER OF PAIRS

Unfamiliar	Familiar
City	Rural
Excitement	Tranquil

21. How well does the following statement describe you: “I like to challenge myself when I’m on a leisure trip”?

    Does not describe me   Describes me

22. Do you agree or disagree with the following statement: “We carefully plan our trip before actually going”?

    Disagree   Agree

23. How familiar would you say you are with the Canadian Badlands region?

    You know a lot about it
    You know something about it
    You know a little about it
    You have heard of it, but know nothing about it
    You have never heard of it   IF “NEVER HEARD” SKIP TO Q25

    Not sure   IF “UNSURE” SKIP TO Q25

24. What is your overall impression of the Canadian Badlands region as a place to visit for a vacation or pleasure trip?

    Very favourable
    Somewhat favourable
    Neither favourable nor unfavourable
    Somewhat unfavourable
    Very unfavourable

    No impression

25. The Canadian Badlands has recently been defined as a new tourism region in south eastern Alberta. Please look at the map of the area and click on the names of any places (cities, towns, provincial parks, lakes or rivers) in the region that you have visited for vacation or pleasure in the past 5 years.

Also click on the number of any highway or road that you traveled for vacation or pleasure in the past 5 years.

Definition: For the purpose of this question, "visited" means you stayed there overnight, stopped there for a short period, or can remember something about the place from when you drove through it on a vacation or pleasure trip.

If you have not visited this region for vacation or pleasure in the past 5 years, please check the box below.

Canadian Badlands Region Map 2 with hotspots

Box "Have not visited in the past 5 years": SKIP TO Q25b

25b. When did you last visit any place in the Canadian Badlands for pleasure or vacation?

Over 5 to 10 years ago
Over 10 to 20 years ago
Over 20 years ago
Have never been there

26. What are the chances that you will visit a place or places in the Canadian Badlands for pleasure or vacation in the next 3 years by … *Please select one answer for each statement*

Making a special trip to the region
Extending your trip in Alberta to visit the region
Visiting the region but not changing the length of your trip in Alberta

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

27. To what extent do you agree or disagree with the following statements about the Canadian Badlands as a place to visit on a vacation or pleasure trip? Please share your impressions even if you haven't been there. *Check one answer for each statement* RANDOMIZE ORDER

Scale: Strongly agree, Somewhat agree, Neither agree nor disagree, Somewhat disagree, Strongly disagree, Don't know

- Fun for children
- Fun for adults
- Boring to drive through
- A comfortable, familiar place for you
- People are friendly
- There are good hospitality services (e.g., accommodation, food)
- There is enough for you to do at night
- The weather is great for visiting
- Offers unusual and rare attractions, activities and experiences
- There are lots of different recreational activities you can do
- There are lots of interesting places to visit
- There are lots of opportunities for relaxation
- A place where you learn
- Has beautiful scenery
- Has unusual natural features and landscapes
- The best place in the world to go for dinosaurs
- You can see lots of wildlife and birds
- Offers western experiences and pioneer history
- Includes interesting small towns and cities
- Rich in the arts - theatre, music festivals, painting, pottery and more
- Offers opportunities to learn about Aboriginal culture
- The distance between attractions is too great

28. The pictures and descriptions in the pile of cards below show some of the attractions in the Canadian Badlands. To what extent would each of these attractions influence <u>you</u> to visit the Canadian Badlands?

Please indicate your answer by clicking the top left corner and dragging each card to one of the 4 squares that best reflects your response

12 images with descriptions

I would specifically go to the Canadian Badlands to see this
I would extend my trip in or through Alberta to see this
I would visit this attraction but it wouldn't change how long I stay on my trip in Alberta
I would not go there – it doesn't interest me

32. What are the chances that you would take each of the following types of <u>escorted</u> tours in the Canadian Badlands, with interpretation offered by a knowledgeable guide? *Please select one answer for each option*

A multi-day motorcoach tour starting in a city in Alberta (e.g., Calgary or Medicine Hat)
A local one day or half day bus tour starting in the area
A guided walk with an interpreter

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

33. Which of the following would you be interested in experiencing in the Canadian Badlands: *Select all that apply* RANDOMIZE ORDER

- Water-based activities (e.g., fishing, kayaking/canoeing, sailing, rafting, water skiing)
- Winter activities (e.g., skiing, snowmobiling, snowshoeing, ice fishing)
- All terrain vehicle (ATV), quadding
- Cycling, mountain biking
- Motorcycling, motorbike rallies
- Hiking, backpacking
- Horseback riding
- Golfing
- Hunting
- Geocaching (using a GPS to find hidden stashes)
- Wildflowers/flora viewing
- Wildlife spotting and viewing, bird watching (e.g., pronghorn antelope, birds of prey)
- Star gazing, eclipse viewing, star parties
- Aboriginal experiences, attractions or activities (e.g., rock art, interpretive center, culture, story telling)
- Festivals and events (e.g., rodeos, country fairs, farmers' markets, parades)
- Performing arts, indoors or outdoors (e.g., theatre, dance, music, concerts, shows)
- Theme and amusement parks (e.g., spray park/waterslide, snake park, dinosaur theme park, film locations)
- Fine arts and crafts, galleries, studios and exhibitions (e.g., pottery, stained glass, furniture, paintings)
- Museums or exhibits (e.g., dinosaur museum, heritage museum, NWMP, industrial heritage museums)
- Historic sites, palaeontological/archaeological sites (e.g., coal mine, ghost town, authentic pioneer village, dinosaur dig)
- Historic architecture/buildings, forms of transportation (e.g., railway station, steam train, ferry, churches, suspension/trestle bridges)
- Natural wonders and panoramic views (e.g., unusual rock formations, geological layers, canyons/coulees, hoodoos)
- Lovely scenery (e.g., green rolling hills, lakes, river valleys, prairie)
- Guided walks/hikes and interpretive programs at provincial parks
- Hot air balloon rides, helicopter tours
- Resort
- Health and wellness spa
- Campground/RV park
- Guest/dude ranch, trail rides, stock drives
- Cottages/cabins
- Casino
- Movies/cinema
- Photography
- Photo safari, fine arts camps or workshops
- Shopping and browsing
- Fresh local food, ingredients and recipes
- Visit friends or relatives
- Peace and quiet
- None of the above

34. Taking into consideration everything you have now seen and read about the Canadian Badlands, what are the chances that you will visit a place or places in the region for pleasure or vacation in the next 3 years by … *Please select one answer for each statement*

Making a special trip to the region
Extending your trip in Alberta to visit the region
Visiting the region but not changing the length of your trip in Alberta

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

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

IF ONE (1): SKIP TO Q37

36. How old is the youngest child living in your household:

Up to 5 years
6 to 12 years
13 to 17 years
18 or older
No children in household

37. What is the highest level of education you have completed to date:

Some elementary or high school
High school diploma
Trade certificate or diploma from a vocational school or apprenticeship training
Non-university certificate or diploma from a community college, school of nursing, etc.
University certificate or diploma below bachelor's level
Bachelor's degree
University post-graduate degree or certificate above bachelor's degree

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

Up to $70,000 GO TO Q38b
Over $70,000 GO TO Q38c

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

Up to $40,000 THANK YOU
Over $40,000 THANK YOU

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

Up to $100,000 THANK YOU
Over $100,000 THANK YOU