

# MARKET POTENTIAL FOR DUTCH TRAVELLERS TO VISIT ALBERTA, CANADA

## CONSUMER ONLINE SURVEY REPORT

MARE Research team: Kimm Scholten, Dewy Heiser, Liesbeth Gerritsen  
and Initial Concept

Client: Alberta Tourism, Parks and Recreation and Travel Alberta

Report Date: April 2008

CREATIVE WAYS TO SOLID DECISIONS



## TABLE OF CONTENTS

EXECUTIVE SUMMARY _____	4
1. METHODOLOGY _____	8
1.2 Objectives of the study _____	8
1.3 Research methodology _____	9
1.4 Questionnaire _____	10
2. TRAVEL BEHAVIOUR, INFORMATION GATHERING AND MOTIVATION IN GENERAL _____	11
2.1 Travel behaviour _____	11
2.2 Travel motivation _____	16
2.3 Information gathering _____	17
3. TRAVEL BEHAVIOUR, INFORMATION GATHERING AND MOTIVATION FOR TRAVEL TO CANADA _____	21
3.1 Travel behaviour _____	21
3.2 Travel motivation _____	22
3.3 Information gathering _____	24
4. TRAVEL BEHAVIOUR, INFORMATION GATHERING AND MOTIVATION FOR TRAVEL TO ALBERTA _____	25
4.1 Familiarity with Alberta _____	25
4.2 Travel behaviour _____	26
4.3 Travel motivation _____	28
4.4 Information gathering _____	29
5. FUTURE PLANS FOR TRAVELLING TO CANADA AND ALBERTA _____	29
5.1 Intention to visit Western Canada _____	30
5.2 Intention to visit Alberta _____	31
5.3 Motivation to visit Western Canada _____	32
6. TOURISM POTENTIAL FROM THE NETHERLANDS _____	33
6.1 Potential Visitors to Western Canada _____	33
6.2 Potential Visitors to Alberta _____	34
6.3 Potential Visitors to the Canadian Rocky Mountains _____	36
7. TRAVEL ALBERTA _____	39
7.1 Awareness of Travel Alberta _____	39

7.2 The Travel Alberta website _____	40
8. MEDIA BEHAVIOUR _____	45
8.1 Television _____	45
8.2 Radio _____	46
8.3 Internet _____	47
8.4 Magazines and Newspapers _____	47
9. CONCLUSIONS AND RECOMMENDATIONS _____	49
9.1 Overall conclusions _____	49
9.2 Size and potential of the Dutch tourism market _____	50
9.3 Effective reach and messaging for the Dutch travelling population	51
APPENDIX _____	53

## Executive Summary

### Vacations outside Europe

- Most Dutch people go on a vacation outside Europe once a year or less (90%), primarily because of the need to save for the trip and the need to plan time off from work. The Dutch book their vacations outside of Europe between two and six months in advance. This period is the same whether bookings made are made via the internet or a travel agent. Regardless of whether they book via the internet or via a travel agency, most Dutch travellers prefer to book the flight and the accommodation in advance.
- The most popular types of vacation are 'relax' holidays and 'beach' holidays. Young adults are also interested in adventurous vacations, which could make Canada an interesting holiday destination for this group. The average time spent abroad is two to three weeks. Mature Families stay away longer than three weeks. They have more spare time and money to spend than the Young Adults and Young Families life stage groups.
- Most Dutch travellers prefer a hotel for accommodation on vacation outside of Europe. Tents and caravans are generally not very popular with the Dutch when on vacation outside Europe, but other research reveals that renting a camper is an interesting option when visiting countries such as Canada, New Zealand and Australia.
- Young Families have a stronger preference for 'relax' holidays and 'beach' holidays than the other two life stage groups. Weather is the most important criterion for the choice of a particular country outside of Europe for this group. Young Families may have less interest in Canada because of the perceived lack of beaches in Canada and the perception of Canada as a country with a cold climate.
- Young Adults like adventurous and relaxing holidays. New, unknown territory, sightseeing and culture are important criteria for this group when booking a vacation outside Europe.
- For Mature Families, sightseeing, culture and nature are important. There are many similarities in travel motivations between the Young Adults and Mature Families groups. Since both these groups are more interested in nature and sightseeing, they could also be more interested in Canada as a vacation destination.
- Dutch travellers use many different sources while searching for a vacation outside Europe, so it is difficult to mention one main source. Search engines are used with the highest frequency, followed by travel brochures (written in Dutch). The experiences of friends and word of mouth recommendations are also important. Dutch travellers visit travel agents to gather additional information on a country, to get advice, and to actually book a vacation. Regardless of life stage group, most Dutch travellers prefer to book their vacation outside of

Europe via the internet, which means that travel agents are more important as an information source than as a booking outlet.

### Canada

- More Young Families and Mature Families than Young Adults went on vacation to Canada. Young Adults also spent less time in Canada. Fifty percent of the Young Families and Mature Families visited family and/or friends in Canada, which may in part account for their longer stay. All three groups preferred touring around Canada for sightseeing and nature, rather than remaining in one location.
- Most of the respondents who have never visited Canada stated that a visit to Canada 'just never happened' or 'Canada is not on the top of my list'. Canada may not be top-of-mind, but it is not rejected as a vacation destination either. In addition to visiting family and/or friends, nature and sightseeing are the most frequently mentioned reasons for visiting Canada.
- Sources typically used to gather information about Canada include travel agents, friends, internet search engines and travel guide books. Young Adults prefer travel guide books such as Marco Polo and Lonely Planet. Young Families like using internet search engines more than the other two groups. Mature Families prefer to talk to a travel agency when gathering information on Canada. Mature Families are more apt to visit a travel agency once they know which country outside of Europe they wish to visit.

### Alberta

- Awareness of Alberta is low. When first asked, approximately 45% of the respondents stated that they had never heard of Alberta or thought that Alberta was a city or country, rather than a province. When prompted, only 50% of the respondents knew that Alberta was part of Canada.
- The majority of the respondents have never visited Alberta. Alberta is not a top-of-mind destination and awareness of the province is low, which means that there are no clear reasons to visit Alberta. Those who have visited Alberta stayed for at least one week. Approximately 81% of the Dutch travellers who visited Alberta combined their trip to Alberta with a visit to British Columbia.
- The main reasons for visiting Alberta are nature and the Canadian Rocky Mountains. Most Dutch travellers who have gone on vacation in Alberta visited Banff, Jasper, or Waterton Lakes National Park.
- The sources used to gather information on Alberta are the same sources as those used to find information on other vacation destinations. These sources also offer the three life stage groups all of the information they need. Over 98% were able to find all of the information they needed about Alberta.

- Word-of-mouth recommendations and travel agents play an important role in the information gathering process. To positively influence travel agents and generate word-of-mouth recommendations, travel agents could be invited on special tours of Alberta. Travel agents could also be asked to write about their experiences for the Dutch Travel Alberta website.

#### Intention and motivation to visit Western Canada and Alberta

- A large percentage (58% to 71%) of Dutch travellers who have been on a vacation outside of Europe in the last five years expressed an interest in visiting Western Canada in the next four years. The percentage interested in visiting Western Canada in the next two years is much lower: 4% of Young Families and 7% of Mature Families. Eighty percent of the respondents who expressed an interest in visiting Western Canada intend to visit the Rocky Mountains. The percentage interested in visiting Alberta is much lower (50%). Awareness and popularity of the Canadian Rocky Mountains is higher than awareness and popularity of Alberta. Many Dutch travellers are unaware of the fact that the Canadian Rocky Mountains are located in Alberta.
- Nature is the most important travel motivation for visitors to Western Canada. Young Adults also mention 'adventurous' as a motivation. For this group, sporting activities such as kayaking and climbing are an extra reason for visiting Western Canada. Dutch travellers who do not intend to visit the region gave 'not interested in Western Canada', 'too expensive' and 'weather not appealing' as reasons.

#### Potential for Dutch travellers to visit Alberta

- The calculated potential for the Canadian Rocky Mountains is much higher than it is for Alberta in all three life stage groups: Young Adults 42% as opposed to 14% for Alberta, Young Families 29% as opposed to 8% for Alberta, and Mature Families 39% as opposed to 21% for Alberta.

#### Travel Alberta

- Awareness of Travel Alberta is extremely low in all three life stage groups. Spontaneous recall of the Travel Alberta slogan is null. This is to be expected, since awareness of Alberta is also quite low.
- The Dutch Travel Alberta website makes a good overall impression. All three life stage groups gave the website a mean average rating of between 7.1 and 7.3.
- The website is well structured and it is easy to navigate through it. The respondents were also positive about the information presented on the site.
- The site does not change Alberta's image as a vacation destination. Most of the respondents still feel that Alberta is 'boring' or 'corny' after seeing the website.

- The respondents require a wide range of different types of information to plan a vacation to Alberta and were able to find the required information on the website.

#### Media behaviour

- The media consumption of the three life stage groups mirrors that of the general Dutch population
- The three life stage groups have similar preferences with regard to television channels. The most popular channels are RTL 4, Nederland 1 and SBS6. The three life stage groups regularly watch 'news and current affairs', 'documentaries' and 'informative programs'. 'Travel' and 'nature' programmes are more popular with Mature Families than with the other life stage groups. 'Action series' and 'action movies' are more popular with Young Families and 'comedy series' are more popular with Young Adults. Radio 538, Sky Radio, 3Fm and Q-music are the most popular radio stations with the three life stage groups.
- Readership of women's magazines is high in all three life stage groups. Readership of sponsored magazines and travel and leisure magazines is highest in the Mature Families life stage group. Readership of family magazines is higher in the Young Families life stage group than in the other groups. Readership of free newspapers such as Metro and Spits, both of which are distributed in metro and train stations throughout the Netherlands, is higher in the Young Adults group than in the other life stage groups.
- There is little difference between the three life stage groups in terms of internet use. All three life stage groups use the internet most frequently for e-mail, banking and using search engines such as Google.

## 1. METHODOLOGY

### 1.1 Background and introduction

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

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

### 1.2 Objectives of the study

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

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

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

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

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

This report describes the findings from phase 2 of the project.



### 1.3 Research methodology

To give Travel Alberta the greatest possible insight into the potential of Dutch travellers to visit Alberta, respondents were drawn from a large representative panel (Invotes) for phase 2 of the study. The online interviews were conducted using Computer Aided Web Interviewing (CAWI). CAWI is relatively inexpensive; it made it possible to include the Dutch Travel Alberta website in the study and to survey a statistically relevant sample of the Dutch population.

Because universal data on market penetration, market potential and market share were unavailable for Alberta, quota sampling was used to obtain a gross sample that was representative of the 18+ year old Dutch population in terms of gender, age, income and region.

A screener was used to limit the sample to long haul travellers (i.e. travellers who have taken an overnight vacation outside of continental Europe at least once in the last five years). These travellers were subsequently divided into the following life stage groups:

1. Young Adults: households made up of one or more person(s) aged 18-35, with no children in the household. In this group, 346 net interviews were completed.
2. Young Families: households made up of more than one person aged 25-49, with at least one child under the age of 18 years living at home full time. In this group, 341 net interviews were completed
3. Mature Families: households made up of one or more person(s) aged 50-74, with no children in the household. In this group, 342 net interviews were completed.

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

The research objectives for phase 2 of the study are as follows:

- To gain insight in the size of the Dutch travelling population
- To gain insight in the potential of the Dutch travelling population (projected growth rate) to visit Alberta
- To gain insight in what the most effective channels are in reaching the travelling population within the Netherlands

#### 1.4 Questionnaire

The appendix contains the questionnaire that was used for the study, which was conducted from January 28, 2008 through February 8, 2008. The questionnaire consisted of 62 questions and covered the following topics:

- Travel behaviour, information gathering and motivation in general
- Travel behaviour, information gathering and motivation for Canada
- Familiarity with Alberta
- Travel behaviour, information gathering and motivation for Alberta
- Future travel plans, specifically related to Canada and Alberta
- Travel Alberta and the Dutch Travel Alberta website
- Media behaviour (TV, radio, magazines, newspapers and internet)

## 2. TRAVEL BEHAVIOUR, INFORMATION GATHERING AND MOTIVATION IN GENERAL

This section deals with the travel behaviour, information gathering and motivation of the Dutch population regarding vacations outside of Europe in general. The figures in the subsections show the differences between the three life stage groups (Young Adults, Young Families and Mature Families).

### 2.1 Travel behaviour

The variance in frequency of overnight vacations outside of Europe for the three life stage groups is small. On average, nearly 90% go on a vacation outside Europe once a year or less. This is not surprising, since people have to save money to go on a vacation outside Europe.

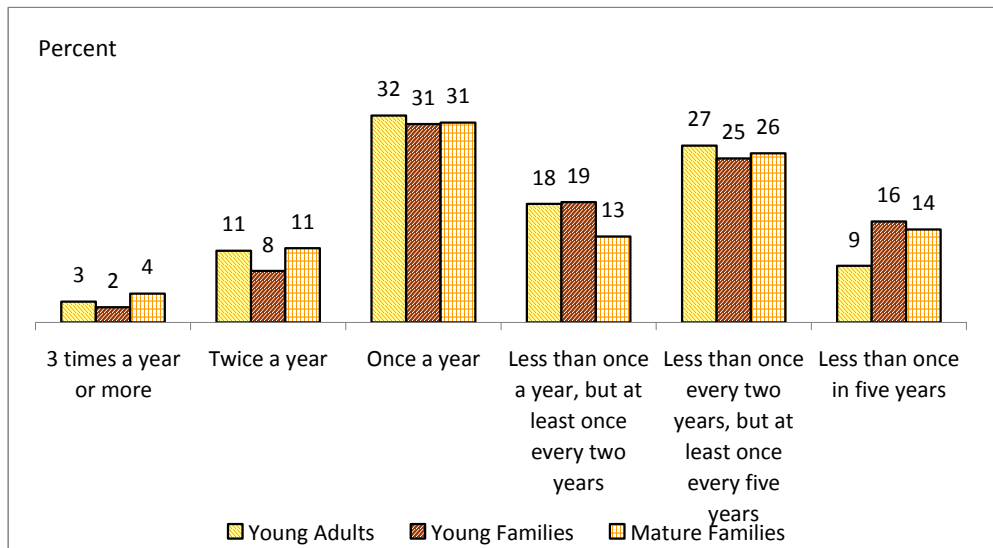
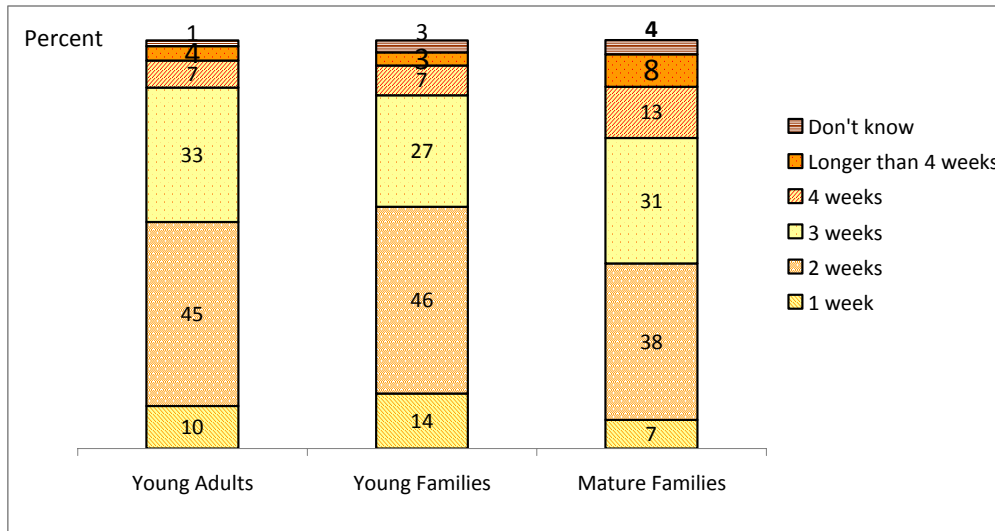


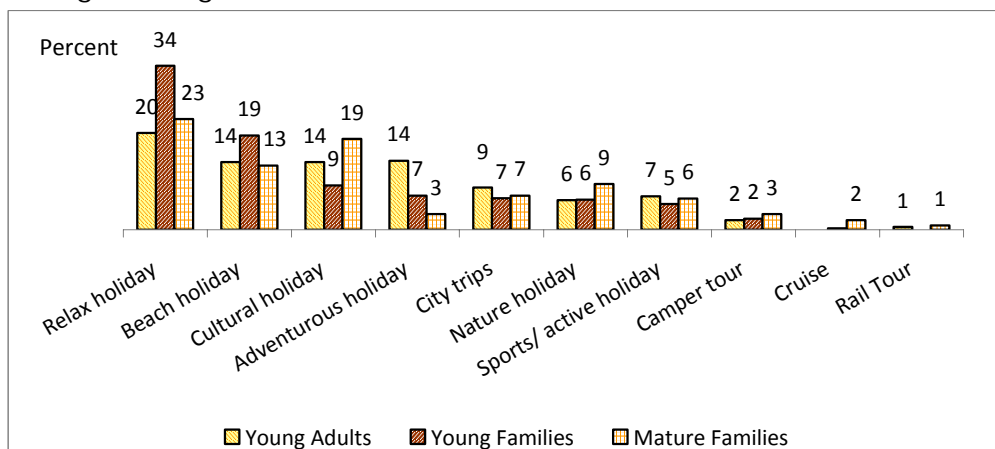
Figure 1. How many times a year do you go on vacation outside of Europe?

The length of stay for most Dutch people on an overnight vacation outside Europe is two to three weeks, but the Mature Families stay away longer than three weeks. Mature Families have more spare time and money to spend and can therefore afford to stay for a longer period of time.



**Figure 2. When you go on vacation outside of Europe, how long do you stay on average?**

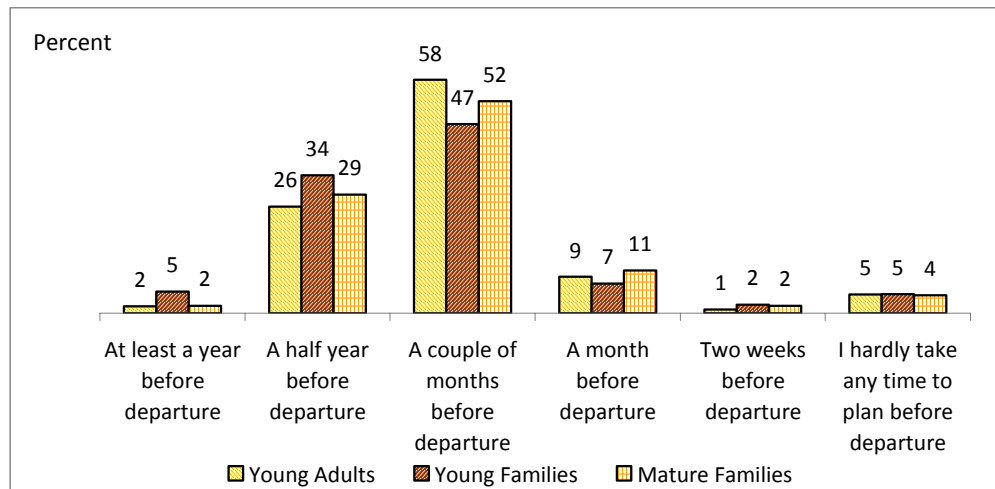
When Dutch travellers go on vacation outside Europe, they prefer to go on a 'relax holiday'. This applies to all three life stage groups. However, Young Families show a higher preference for this kind of vacation and for beach holidays than the other two groups. This is probably because Young Families are busier than the other two life stage groups. They have jobs and children and less spare time in general, which makes relaxation while on vacation more important to them. In addition to their interest in 'relax' holidays, Mature Families also show a marked preference for cultural vacations. Adventurous holidays are popular amongst Young Adults.



**Figure 3. What type of vacation do you prefer?**

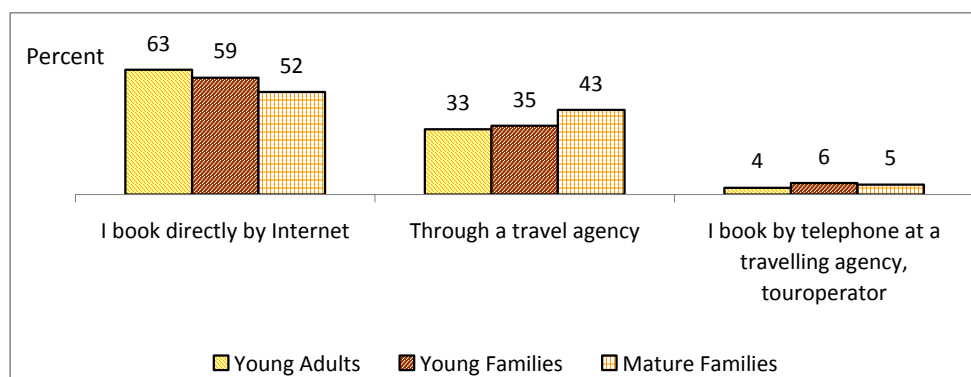
Most Dutch travellers book their vacation outside of Europe between two and six months in advance. The number of respondents who booked their vacation a year in advance was very low. The number who booked a month or less before departure was also low. Because they stay away

for an average of three weeks when they go on a vacation outside Europe, most Dutch travellers have to save money and plan time off from work.



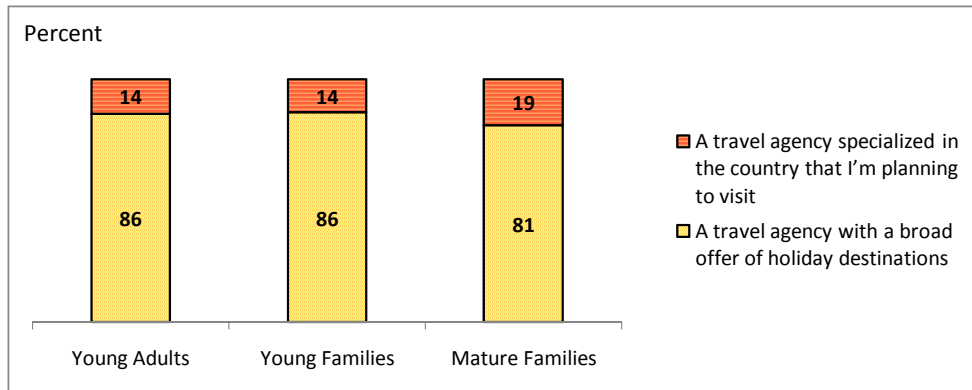
**Figure 4. When do you book your vacation outside of Europe?**

The study reveals that Mature Families are more internet savvy than one might expect. They do not prefer to book their vacation via a travel agency, but prefer to use the internet, just as the other life stage groups do. However, Young Adults and Young Families use the internet (significantly) more often than Mature Families. Only a small percentage of travellers make bookings by telephone.



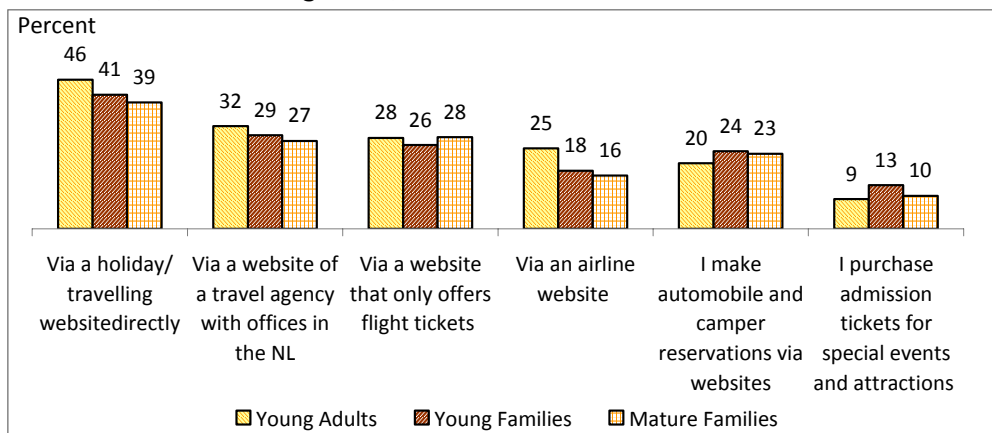
**Figure 5. How do you usually book your vacations outside of Europe?**

The people who use a travel agency to book a vacation outside of Europe regularly use a travel agency that offers a wide range of vacation opportunities. See section 2.3 (pgs. 17 & 18) for an explanation.



**Figure 6 What kind of travel agency do you use?**

Dutch travellers who book directly via the internet prefer to use full-service travel websites. However, they also use websites run by travel agencies with offices in the Netherlands and websites that only sell flight tickets. Young Adults are more experienced in making purchases and searching for information online. Like other Dutch research regarding vacation travel<sup>1</sup>, this study reveals that Young Adults book more frequently via airline websites than the other two groups. Young Adults are less interested in booking accommodation in advance than the other two groups. They generally prefer to book accommodation after they arrive at their destination, in part because of their appetite for adventure (see also figure 3).

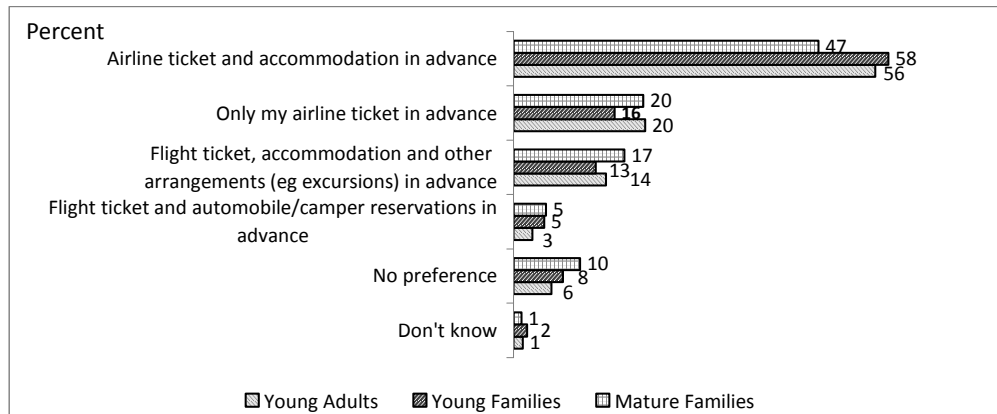


**Figure 7 When you book directly via the internet, which of the following applies to you?**

When booking a vacation, all three life stage groups prefer to book airline tickets and accommodation in advance. Of the three groups, Mature Families show the weakest preference for booking airline tickets

Study: Continuvakantieonderzoek<sup>1</sup>

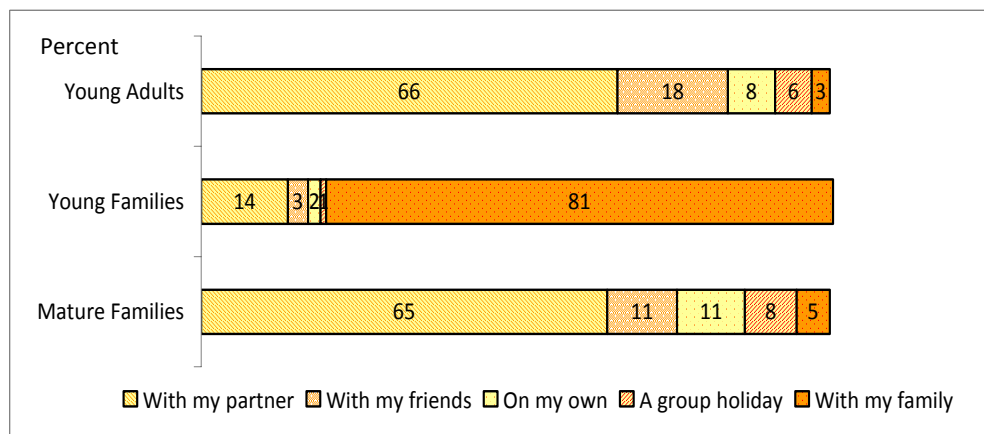
and accommodation in advance. These preferences differ slightly when the vacation is booked directly via the internet (see figure 7).



**Figure 8. What do you prefer when booking a vacation?**

The most frequently visited Dutch travel site is D-reizen (11%), followed by smaller websites such as Fox (3%), Arke (3%), Sunweb, Kras, KLM and Expedia (all 2%). The Arke and Sunweb websites are most often used for beach vacations, making them unsuitable for Alberta. The offers on travel sites such as Fox and Expedia are more suitable for Alberta.

Mature Families and Young Adults prefer to travel with their partners or their friends, while Young Families like to travel with the entire family and of the three groups prefer not to travel on their own.

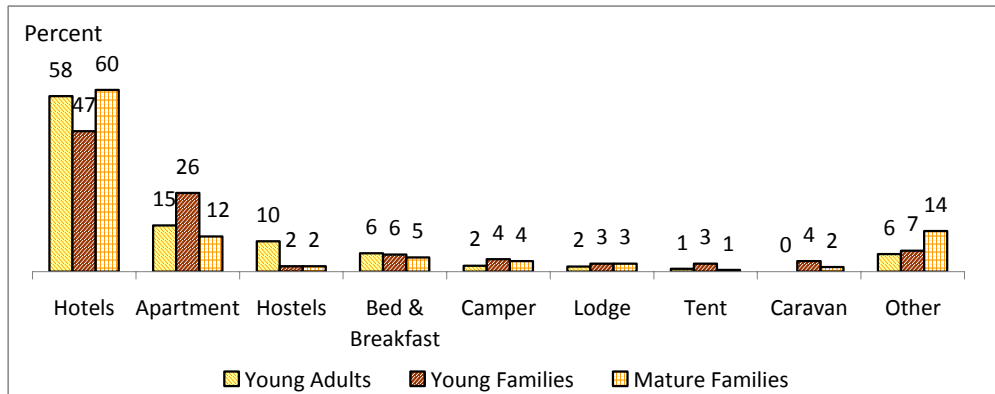


**Figure 9. When I book my vacation outside of Europe, I travel ...**

All three life stage groups tend to use hotels when on vacation outside Europe; of particular note is that 26% of the Young Families prefer an apartment. An apartment offers convenience and comfort when travelling with a family of three or more people. Hostels are more popular amongst Young Adults.

In general, Young Adults have less money to spend and place less value on luxury in comparison with the other groups. As figure 10 reveals,

tents and caravans are not very popular among Dutch travellers when they go on vacation outside Europe. Figure 10 relates to general preferences for vacations outside of Europe. However, other research<sup>2</sup> reveals that Dutch travellers visiting countries such as Canada, New Zealand and Australia are more interested than the data in Figure 10 suggest in renting a camper or staying with friends and relatives.



**Figure 10. When you are on vacation outside Europe, what kind of accommodation arrangements do you use most often?**

## 2.2 Travel motivation

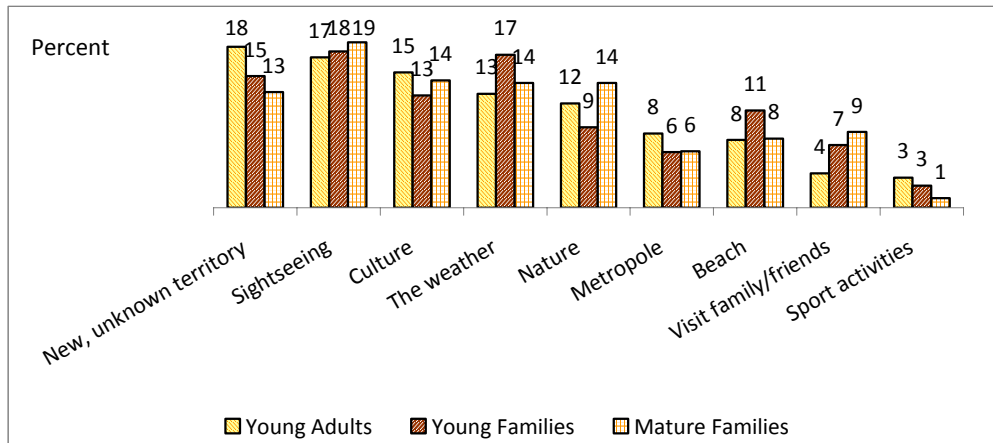
The most important reasons for going on vacation outside of Europe for all three life stage groups are:

- To explore new, unknown territory
- Sightseeing
- Culture
- The weather
- Nature (especially amongst Mature Families and Young Adults)

---

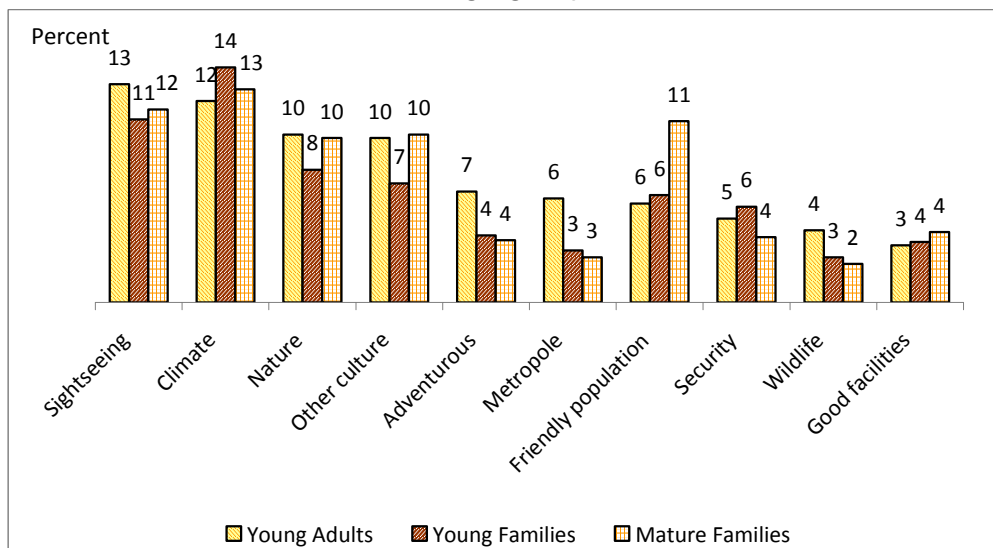
Continuuvakantieonderzoek<sup>2</sup>





**Figure 11. Three most important reasons to book a vacation outside of Europe**

For the total sample, sightseeing, climate, nature and other culture are the most important reasons for choosing a specific country outside Europe, but Young Families express less interest in other culture and nature and more interest in climate than the other life stage groups. As mentioned earlier in this report, Young Families show a strong preference for relaxing beach holidays. Mature Families mention ‘friendly population’ as a reason for going to a particular country outside Europe more often than the other life stage groups.



**Figure 12. Three most important reasons to choose a specific country outside Europe (top 10 score)**

### 2.3 Information gathering

When gathering information for a vacation outside Europe, Dutch travellers use a variety of different information sources. At just over 10%, internet search engines are mentioned most frequently, followed

by travel brochures, TV travel programmes and word-of-mouth recommendations.

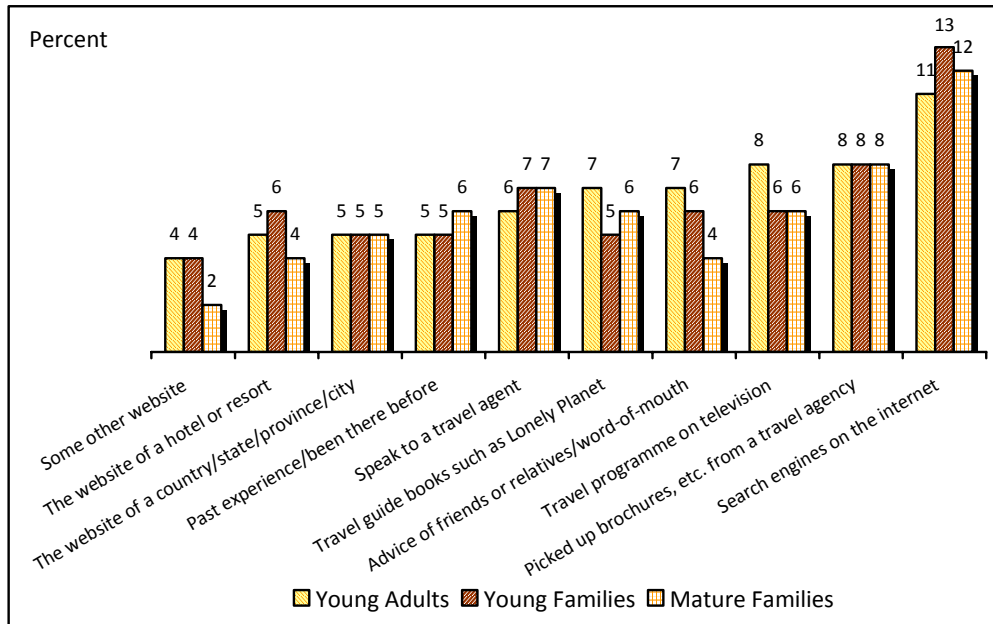


Figure 13. Sources used for information gathering for vacations outside Europe (Top 10 score)

### 2.3.1 Travel fairs as a source of information

The 'Vakantiebeurs in Utrecht' is the most popular holiday travel fair amongst respondents who visit holiday travel fairs as a source of holiday travel information. There is no significant difference between the three groups in this respect. The '50+' fair is also popular with Mature Families.

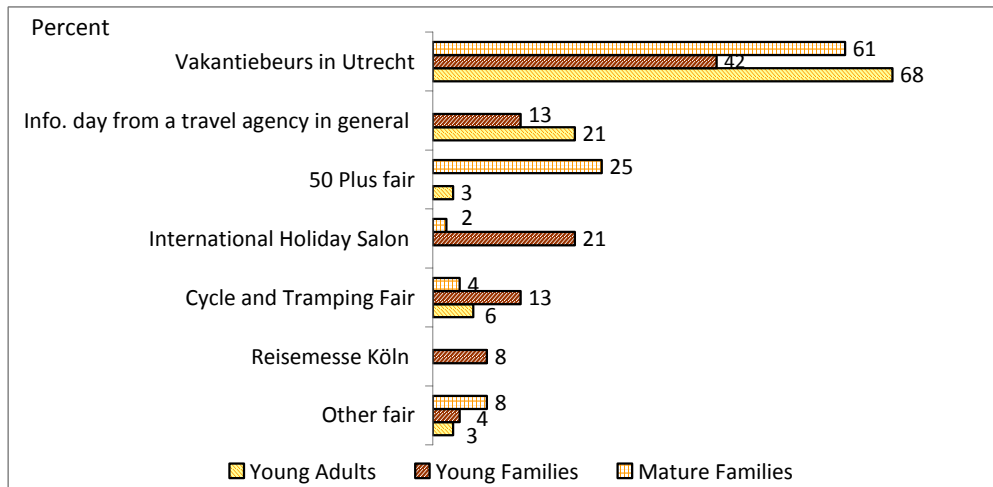


Figure 14. What travel fairs do you sometimes visit?

### 2.3.2 TV travel programs as a source of information

Travel programmes on television are important sources of inspiration and also raise interest in the featured countries. The most popular program in the Netherlands is by far 'RTL Travel Adrenaline'. This TV program is especially popular among Young Adults and Young Families. Peking Express is also popular among all three life stage groups. Young Families also like the program 'Camping Life' and Mature Families enjoy the program 'Rail Away'.

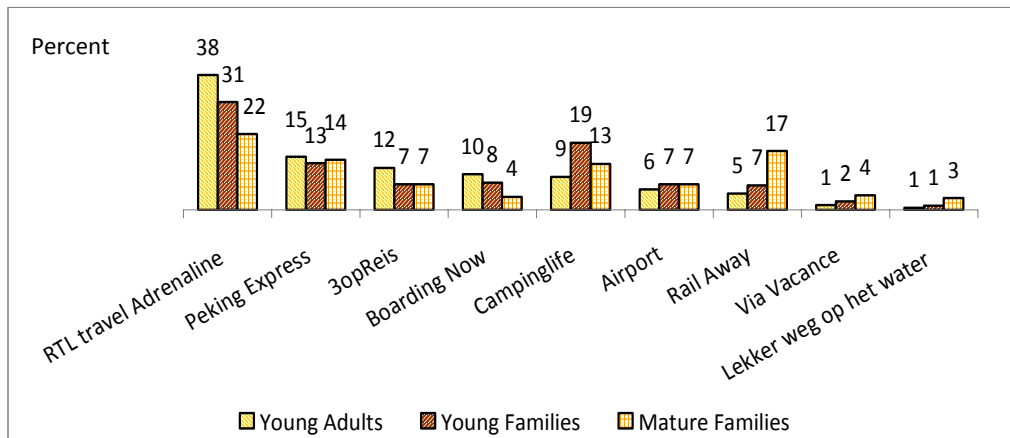


Figure 15 What travel programs do you sometimes watch on TV?

### 2.3.3 Travel agencies as a source of information

Young Adults and Young Families generally visit a travel agency to gather information before they have decided on a destination. Mature Families, on the other hand, usually know which country they wish to visit before they go to a travel agency.

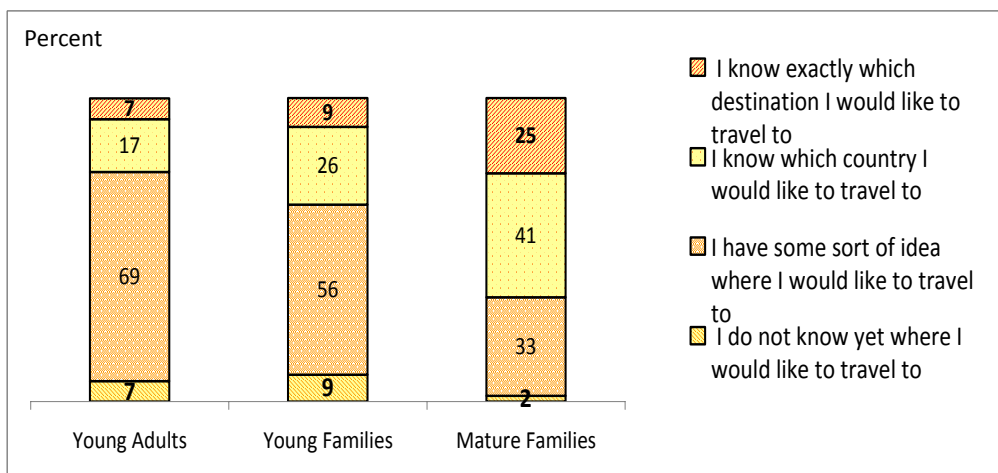


Figure 16 Which of the following statements applies to you most? When I visit a travel agent...

Once Dutch travellers have a better idea of where they want to go, they are more likely to visit a specialized travel agency. Travellers who do not know where they want to go and travellers with only a vague idea of where they want to go tend to visit travel agencies with a broad offering of destinations. Once at the travel agency, they gather comparative pricing information as well as information and recommendations regarding potential destinations. Just over 10% go to a travel agency to make sure that an offer they have found elsewhere (internet, newspaper advertisement) is the best offer available and a small percentage visit the travel agency to actually book their vacation.

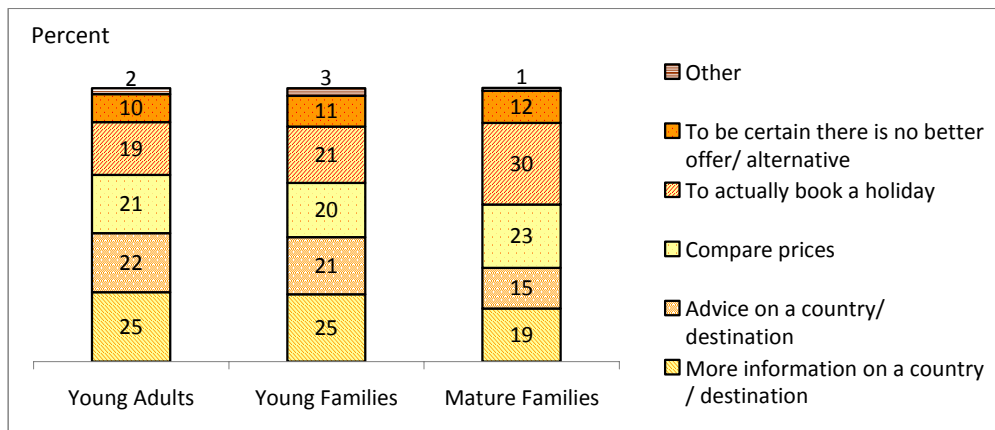


Figure 17 For what reason do you visit a travel agent?

### 2.3.4 Language of the source of information

Over 50% of Young Families and Mature Families believe that it is important or very important to have information about vacation destinations in Dutch. Among Young Adults, 40% have a strong preference to have information about vacation destinations in Dutch.

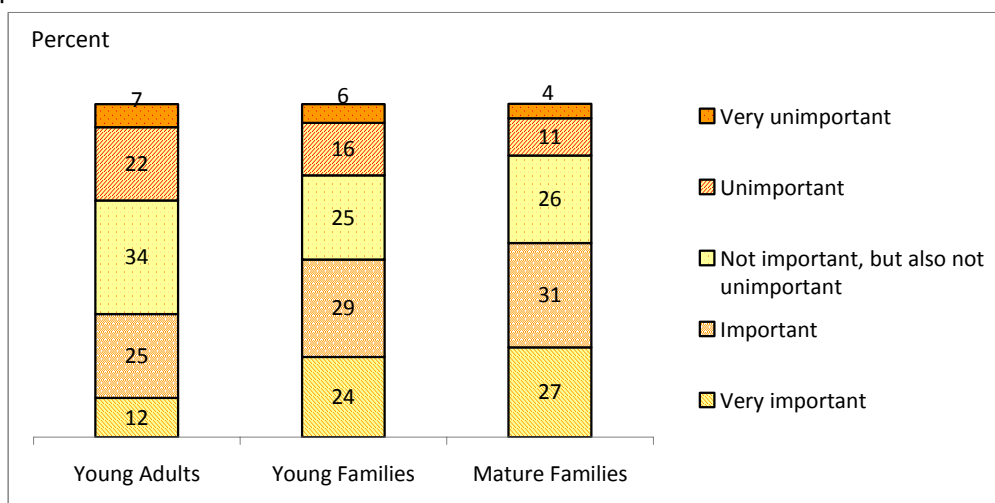


Figure 18 How important is it to you to have the information about a vacation destination in Dutch?

### 3. TRAVEL BEHAVIOUR, INFORMATION GATHERING AND MOTIVATION FOR TRAVEL TO CANADA

This section gives insight into the travel behaviour, motivations, and information gathering behaviour of Dutch travellers with regard to Canada. Section 3.1 describes the travel behaviour of Dutch travellers. Sections 3.2 and 3.3 describe their travel motivations and information gathering behaviour. The figures in the subsections show the differences between the Young Adults, Young Families and Mature Families life stage groups.

#### 3.1 Travel behaviour

Only 12% of the Young Adults have visited Canada. This percentage is significantly lower than the percentage for Young Families and Mature Families.

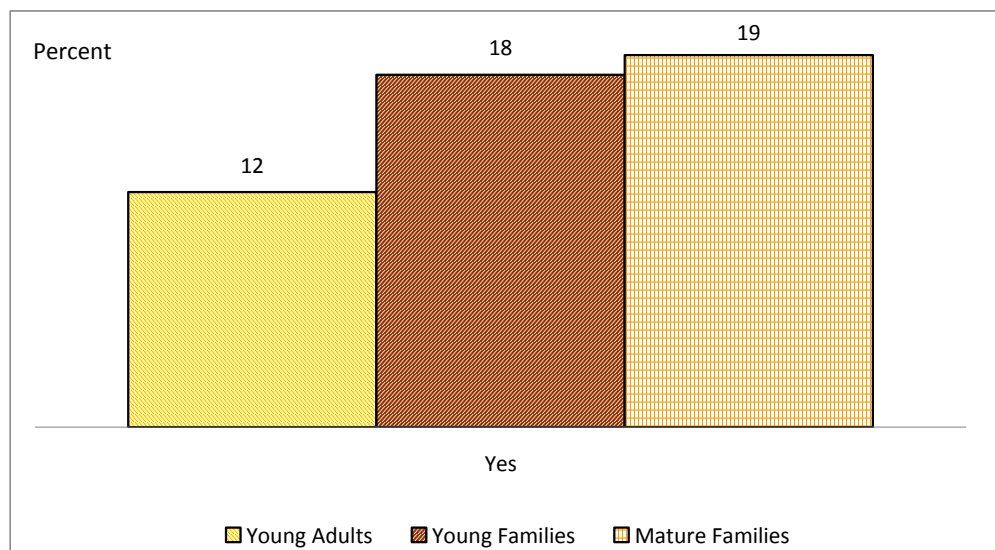


Figure 19. Have you ever been on vacation to Canada?

Just under half of the Young Adults stayed in Canada for only one week, while the majority of the other two life stage groups stayed for two to three weeks. Mature Families spent the most time in Canada. They have more spare time and the financial resources to stay abroad for a longer period of time.

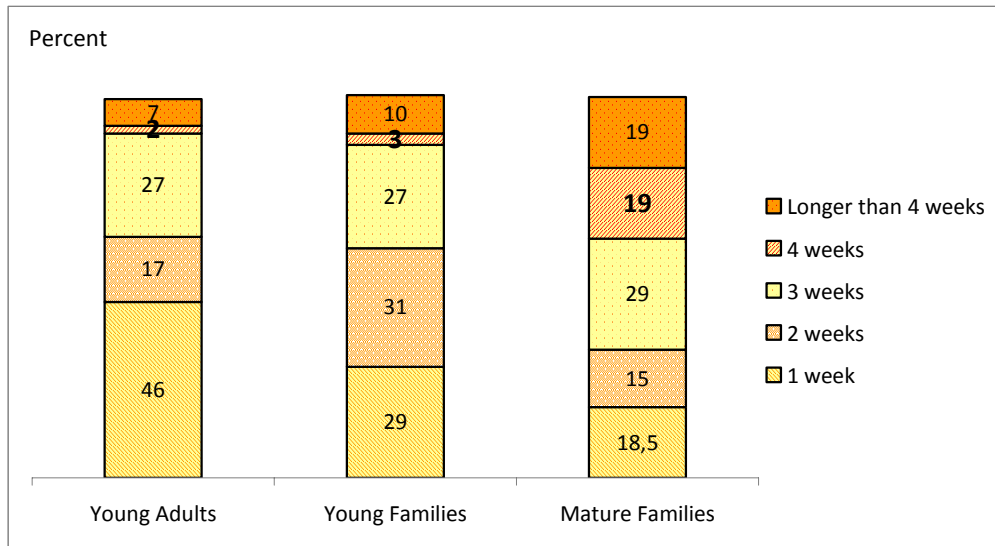


Figure 20. How long did you stay in Canada on your most recent trip?

Dutch travellers who have visited Canada preferred to tour through the country.

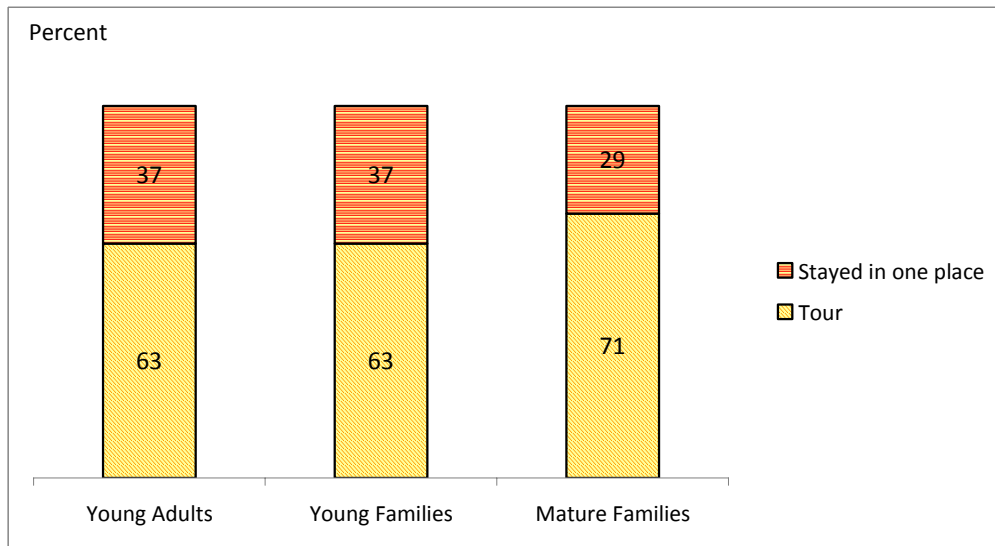


Figure 21. Did you go on a tour through Canada or did you stay in one place?

### 3.2 Travel motivation

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

respondents who filled in an answer for 'other, namely' actually rejected Canada as a vacation destination.

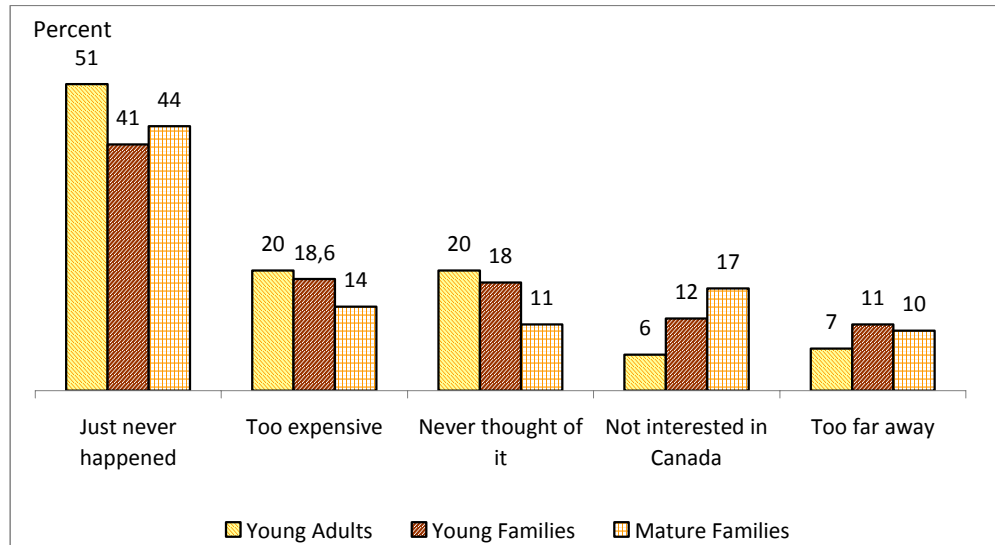


Figure 22. Why have you never been on a vacation to Canada? (TOP 5 mentioned)

There is a significant difference between Young Adults who have visited Canada and Young Families and Mature Families who have visited Canada. Young Adults went to Canada for nature and sightseeing, while the other two life stage groups went to Canada for nature and to visit family and/or friends.

When we look specifically at the people who have visited Alberta, 50% mention the Rocky Mountains as a motivation to go to Canada.

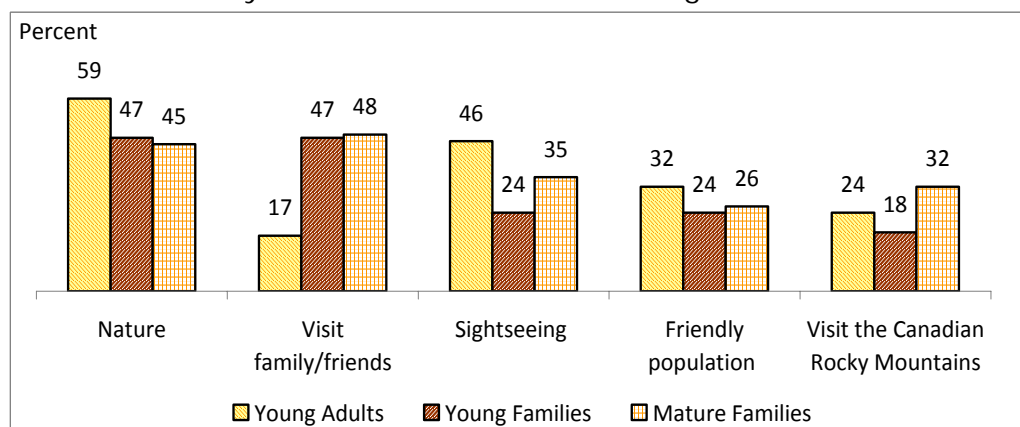


Figure 23. What were your motivations to go to Canada (TOP 5 mentioned)

### 3.3 Information gathering

Sources typically used to gather information about Canada include travel agents, friends, internet search engines and travel guide books. Young Adults prefer travel guide books such as Marco Polo and Lonely Planet. Lonely Planet is very popular among backpackers, who are usually members of the Young Adults life stage group. Young Families like using internet search engines more than the other two groups. Mature Families prefer to talk to a travel agency when gathering information on Canada. As mentioned earlier in this report, Mature Families are more apt to visit a travel agency once they know which country outside of Europe they wish to visit.

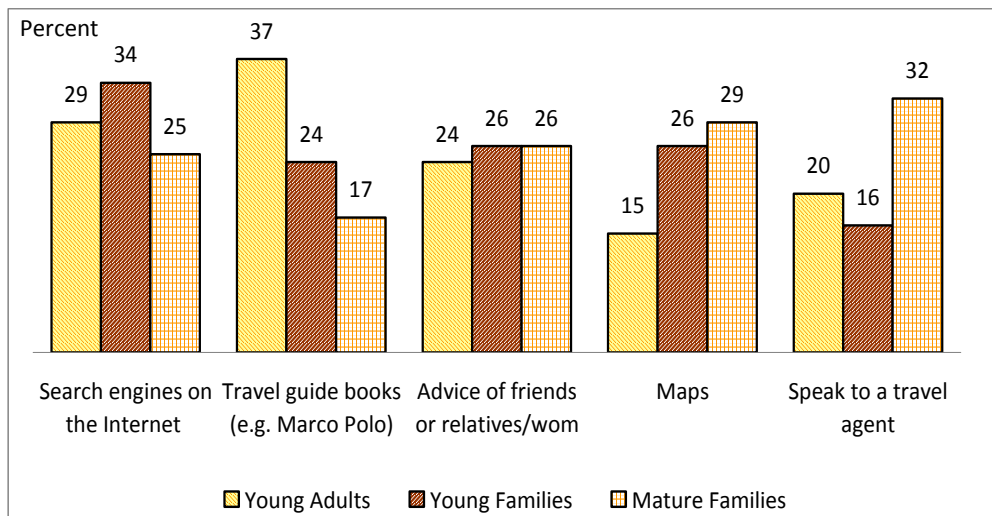


Figure 24. What sources did you use when gathering information on Canada? (TOP 5)



#### 4. TRAVEL BEHAVIOUR, INFORMATION GATHERING AND MOTIVATION FOR TRAVEL TO ALBERTA

This section gives information on awareness levels for Alberta and travel behaviour, information gathering and motivation for vacationing in Alberta. Some of the percentages in this section are provided for all respondents (total), rather than for each of the three life stage groups because of insufficient sample sizes.

##### 4.1 Familiarity with Alberta

Awareness of Alberta is low. When first asked, approximately 45% of the respondents stated that they had never heard of Alberta. One quarter of the Mature Families thought that Alberta was a city. Approximately one third of the respondents in each life stage group knew that Alberta was a province.

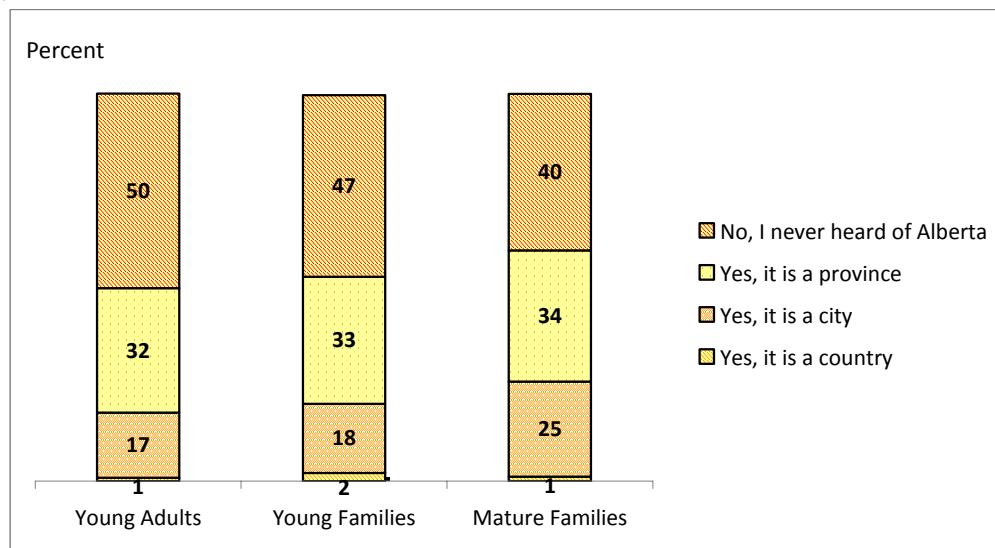


Figure 25. Have you ever heard of Alberta?

When asked what country Alberta belonged to, more than 50% of the respondents stated that Alberta was part of Canada. A smaller percentage of each life stage group thought Alberta was part of the USA. 13% of the Mature families life stage group thought Alberta was part of Australia.

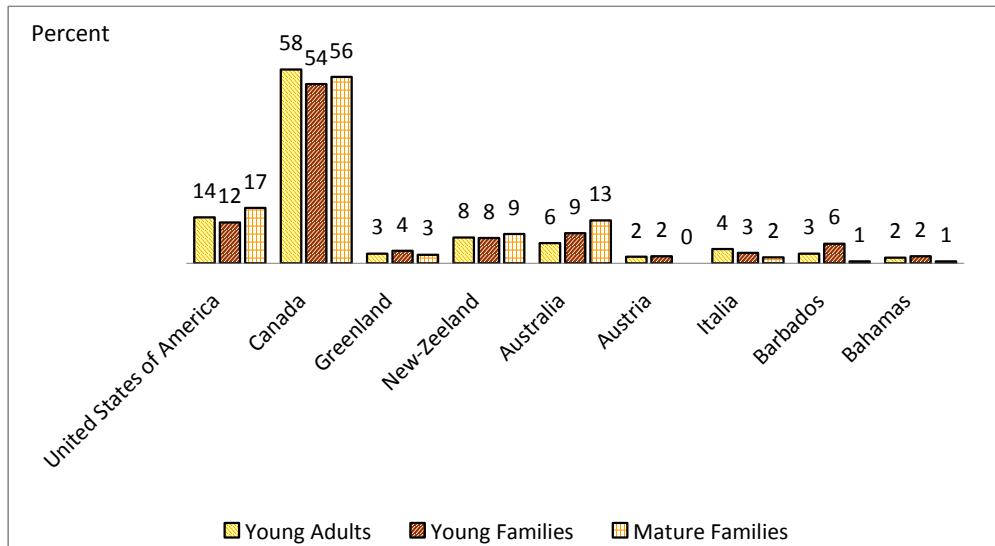


Figure 26. Alberta is a province. What country do you think Alberta belongs to?

#### 4.2 Travel behaviour

All respondents who had vacationed in Canada during the past five years were asked if they had also vacationed in Alberta; most had not. Those who had were primarily Mature Families and Young Adults, rather than Young Families. This is not surprising because nature and sightseeing are Alberta's main attractions. Young Families have less interest in nature and sightseeing than the other life stage groups. They prefer 'relax' holidays and 'beach' holidays.

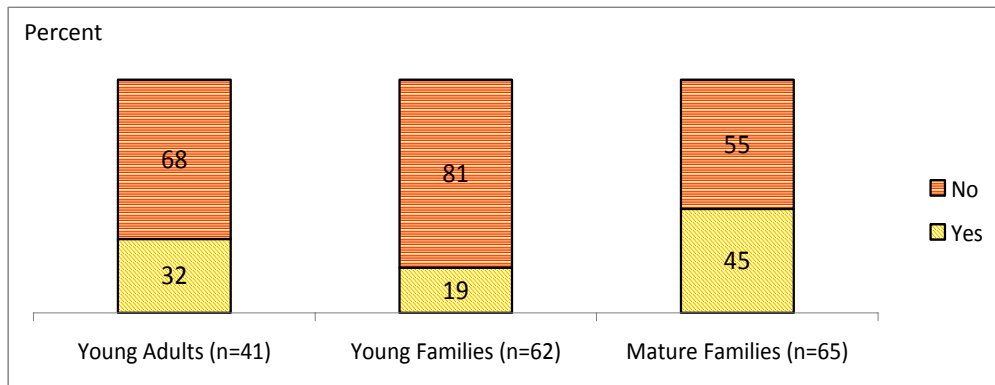
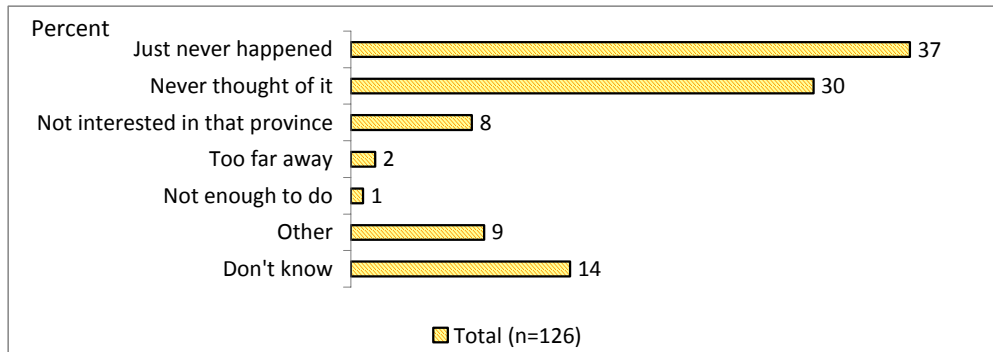
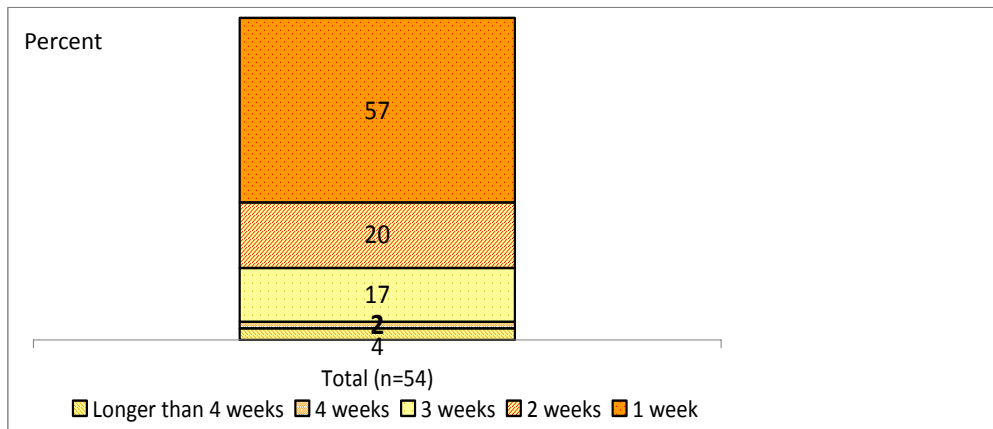


Figure 27. Have you ever been to Alberta?

Those who have visited Canada, but not Alberta were also asked why they had not visited Alberta; 37% stated that a visit to Alberta 'just never happened' and 30% 'never thought of it'.

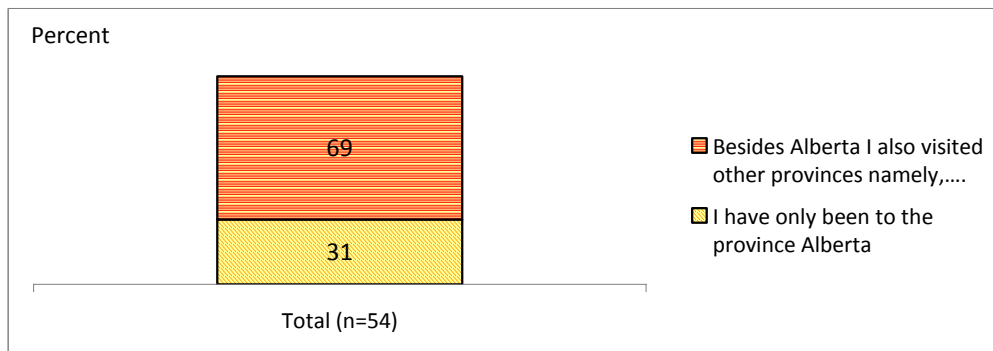


**Figure 28. Why have you never been on a vacation to Alberta?**



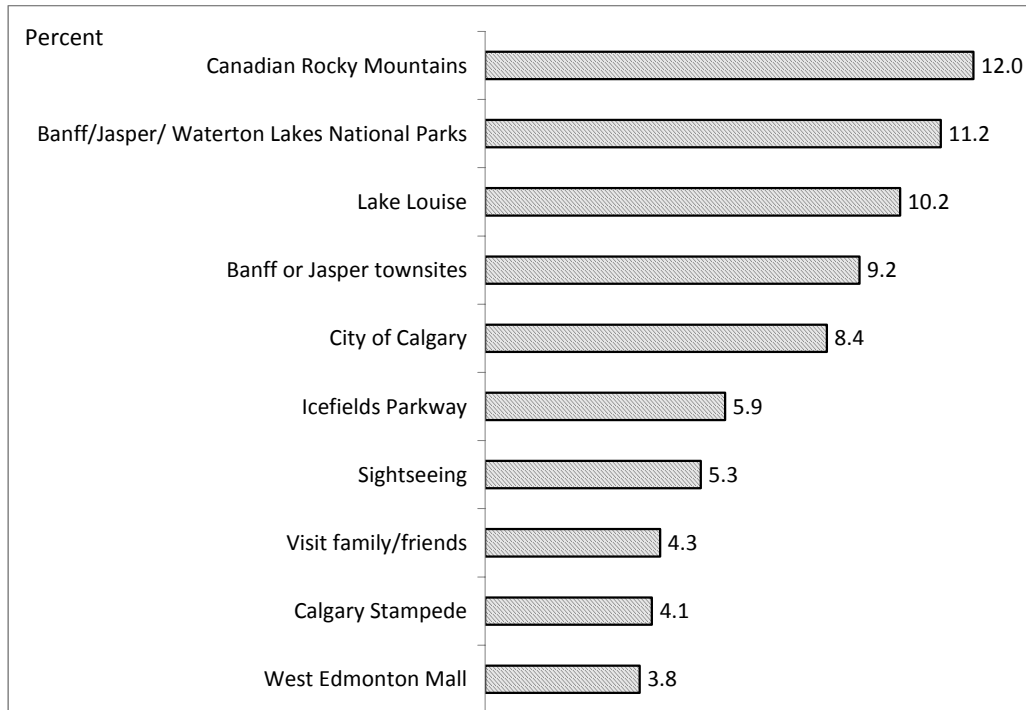
**Figure 29. How long did you stay in Alberta?**

Of the respondents who had vacationed in Alberta during the past five years, 57% stayed one week in Alberta, while 43% stayed for two or more weeks. Eighty one percent also visited British Columbia, which is not surprising, given that most Dutch travellers prefer to tour through Canada. What is surprising is that travellers who prefer to tour through Canada spent so much of their time in Alberta (two weeks is considered a long stay in Alberta). Visitors to Alberta seem to find enough to see and do in the province to justify the above-average length of stay.



**Figure 30. During your vacation in Alberta did you only stay in Alberta or did you also go to other provinces?**

The Canadian Rocky Mountains, Banff, Jasper, and Waterton Lakes National Parks and Lake Louise were the locations most Dutch travellers visited during their vacation in Alberta. These results match the most frequently given reasons for visiting Alberta; that is, nature and visit the Canadian Rocky Mountains (see figure 32).



**Figure 31. What did you do and where have you been during your vacation in the province of Alberta? (TOP 10)**

### 4.3 Travel motivation

Nature in general and the Canadian Rocky Mountains in particular were important motivations for visiting Alberta. At 9%, visiting family/friends and wildlife were also important motivations.

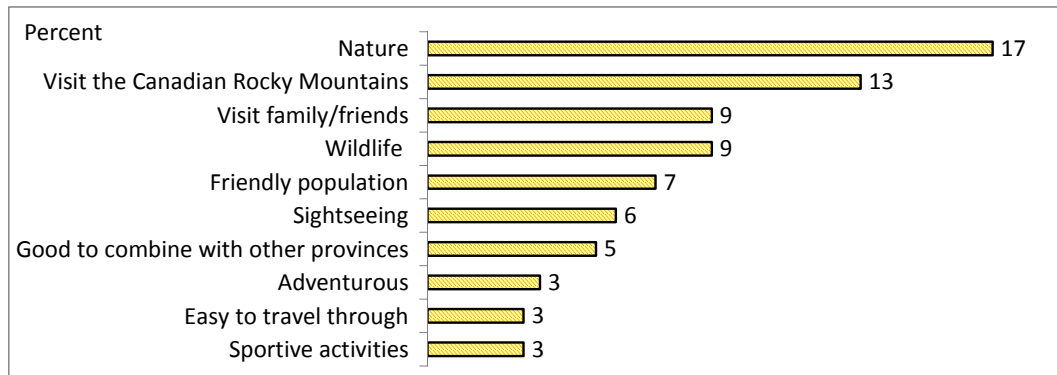


Figure 32. What were your motivations to vacation in Alberta? (TOP 10)

#### 4.4 Information gathering

The sources used to gather information on Alberta are the same as those used to find information on other vacation destinations. These sources also provide the three life stage groups with all the information they require. In fact, 98% were able to find all of the information they required about Alberta as a vacation destination. Word-of-mouth recommendations and travel agents also play an important role in the information gathering process. To positively influence travel agents and generate word-of-mouth recommendations, travel agents could be invited to special tours of Alberta. Travel agents could also be asked to write about their tours for the Dutch Travel Alberta website.

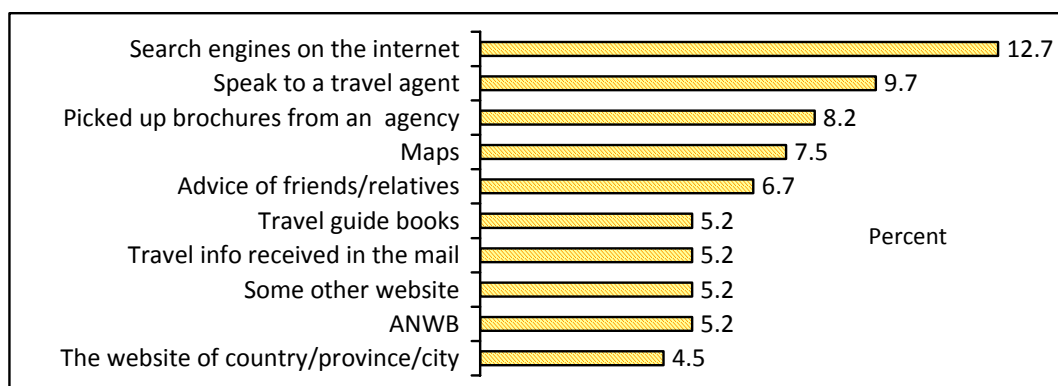


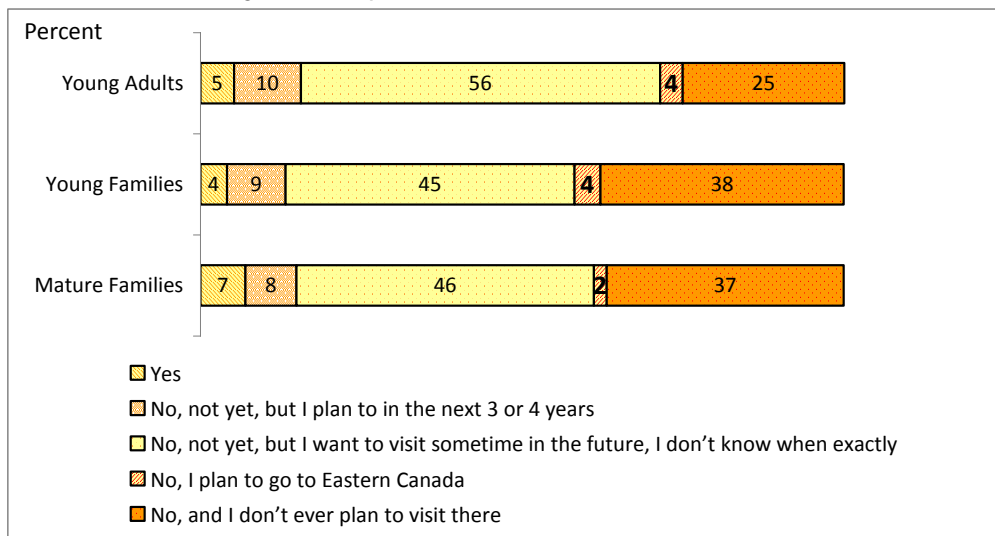
Figure 33. What sources of information did you consult when gathering information for a vacation in Alberta? (TOP 10)

### 5. FUTURE PLANS FOR TRAVELLING TO CANADA AND ALBERTA

In this section respondents were questioned regarding their intentions to visit Western Canada, and more specifically, Alberta. The respondents were also asked what their motivations are to visit or not to visit Western Canada in the future.

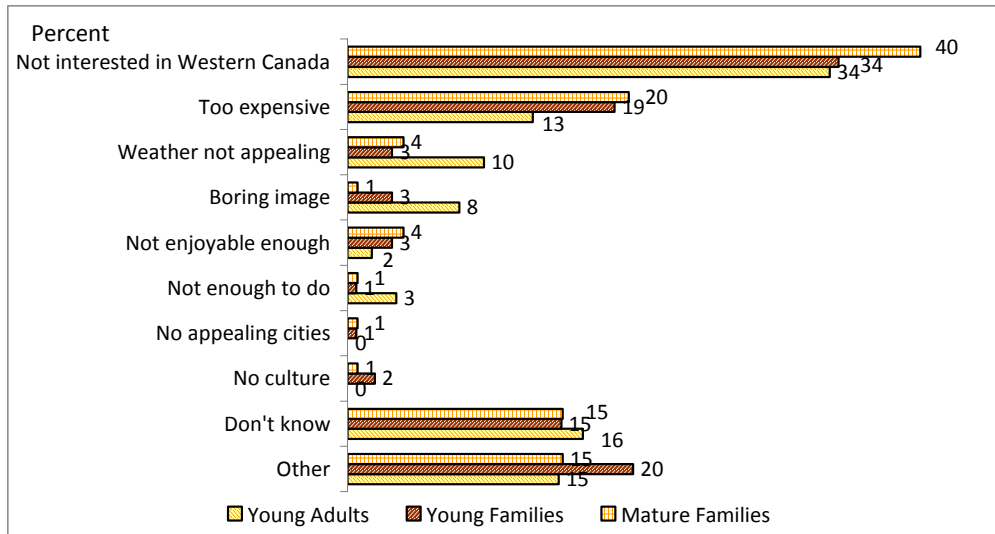
### 5.1 Intention to visit Western Canada

Without considering the precise time frame, between 58% and 71% of Dutch travellers who have been on vacation outside Europe in the last five years intend to visit Western Canada. However, only 4% of the Young Families and 7% of the Mature Families indicated that they intend to visit Western Canada *in the next two years*. Just over 40% of the Young Families and Mature Families and 29% of the Young Adults indicated that they do *not* plan to visit Western Canada at all.



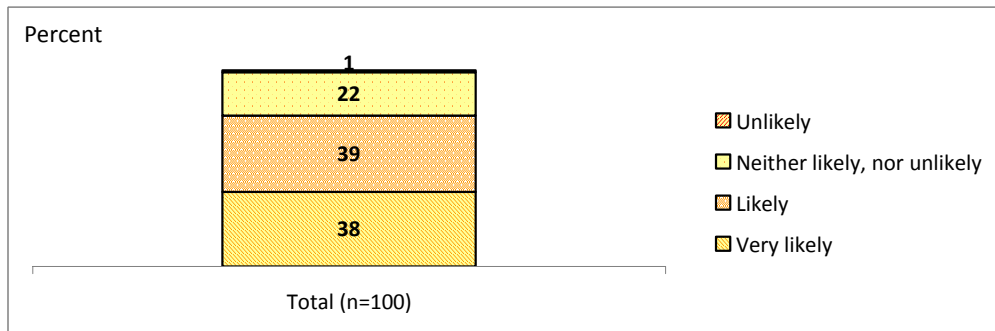
**Figure 34 Do you think you will visit Western Canada, including the Canadian Rockies, within the next one or two years?**

The respondents who indicated that they do *not* plan to visit Western Canada were asked why not. The two reasons given most frequently by all three life stage groups are: no interest or too expensive. In the category 'other, namely', respondents stated that they have other plans, the climate was unappealing (too cold) or Western Canada is too far away. Western Canada is not a top-of-mind destination, which may explain the high percentage of respondents with 'no interest' in visiting Western Canada.



**Figure 35 Why do you intend NOT to go to Western Canada or the Canadian Rockies?**

The respondents who stated that they are planning to visit Western Canada within the next four years were asked how likely it was that they will also visit the Rocky Mountains. Nearly 80% of these respondents stated that they are likely or very likely to visit the Rocky Mountains.



**Figure 36 How likely is it that you will be visiting the Canadian Rocky Mountains during your trip to Western Canada?**

## 5.2 Intention to visit Alberta

The respondents who stated that they are planning to visit Western Canada within the next four years were also asked how likely it is that they would visit Alberta. The percentage of these respondents who indicated that a visit to Alberta is likely or very likely is 50%. As noted previously (see figure 36), 80% stated that a visit to the Canadian Rocky Mountains is likely or very likely. Awareness and popularity of the Canadian Rocky Mountains appears to be much higher than for of Alberta. Moreover, many Dutch travellers are unaware of the fact that

the Canadian Rocky Mountains are located in Alberta. Focusing on the Canadian Rocky Mountains will help attract travellers to Alberta.

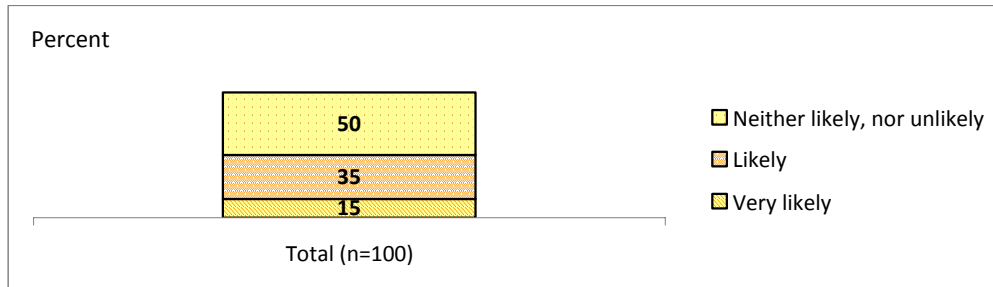


Figure 37 How likely is it that you will visit Alberta during your trip to Western Canada?

### 5.3 Motivation to visit Western Canada

Dutch travellers who intend to visit Western Canada in the next four years state the following reasons most frequently: nature, the Rocky Mountains and wildlife. These responses all relate to the nature that Western Canada offers. Another frequently given reason is sightseeing. Young Adults give 'adventurous' as a reason more frequently than the other two life stage groups. In addition to nature, sporting activities such as kayaking and climbing are also popular with Young Adults as a reason for visiting Western Canada.

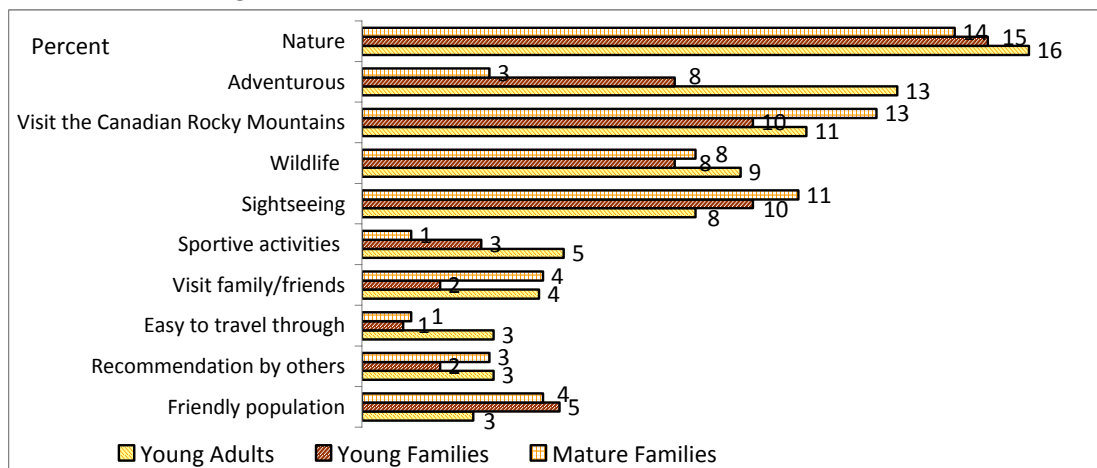


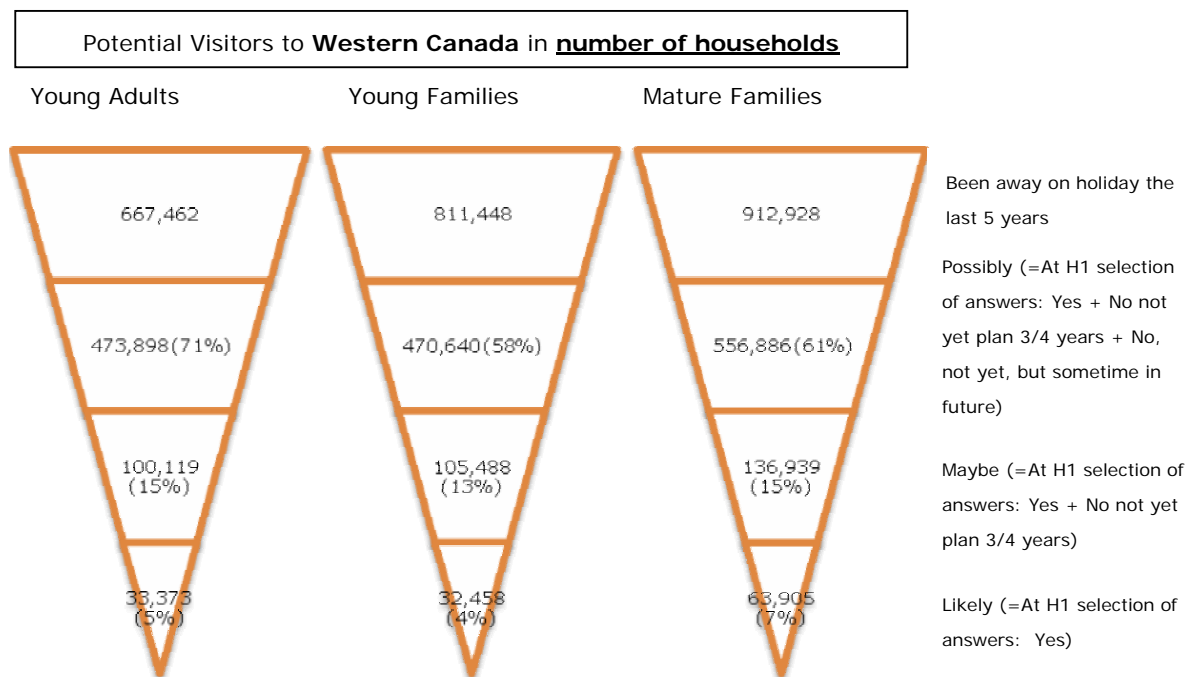
Figure 38 What are your motivations to travel to Western Canada or the Canadian Rockies? (Top 10 score)



## 6. TOURISM POTENTIAL FROM THE NETHERLANDS

### 6.1 Potential Visitors to Western Canada

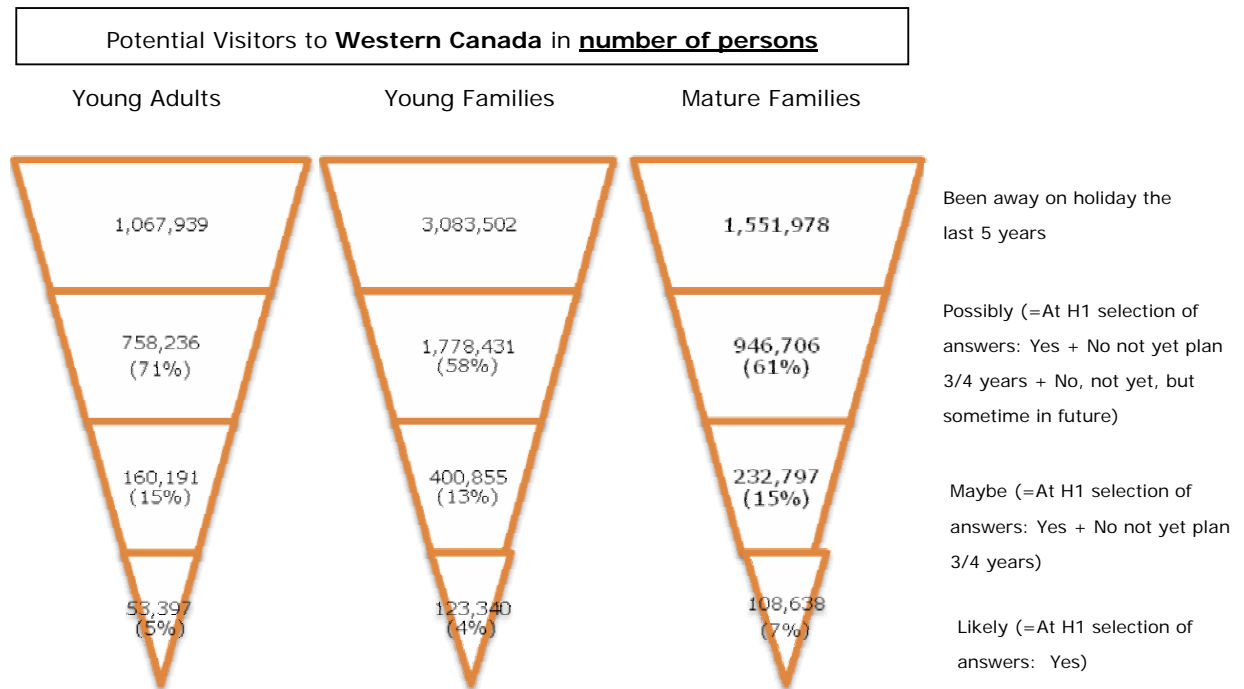
According to the Dutch government statistics bureau (CBS, Statline), there were 7,190,543 households in the Netherlands on 1 January 2007. These households can be divided into the three life stage groups used in this study as follows: the Young Adults group accounts for 1,059,464 households, the Young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



**Figure 39. Potential Visitors to Western Canada in number of households**

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

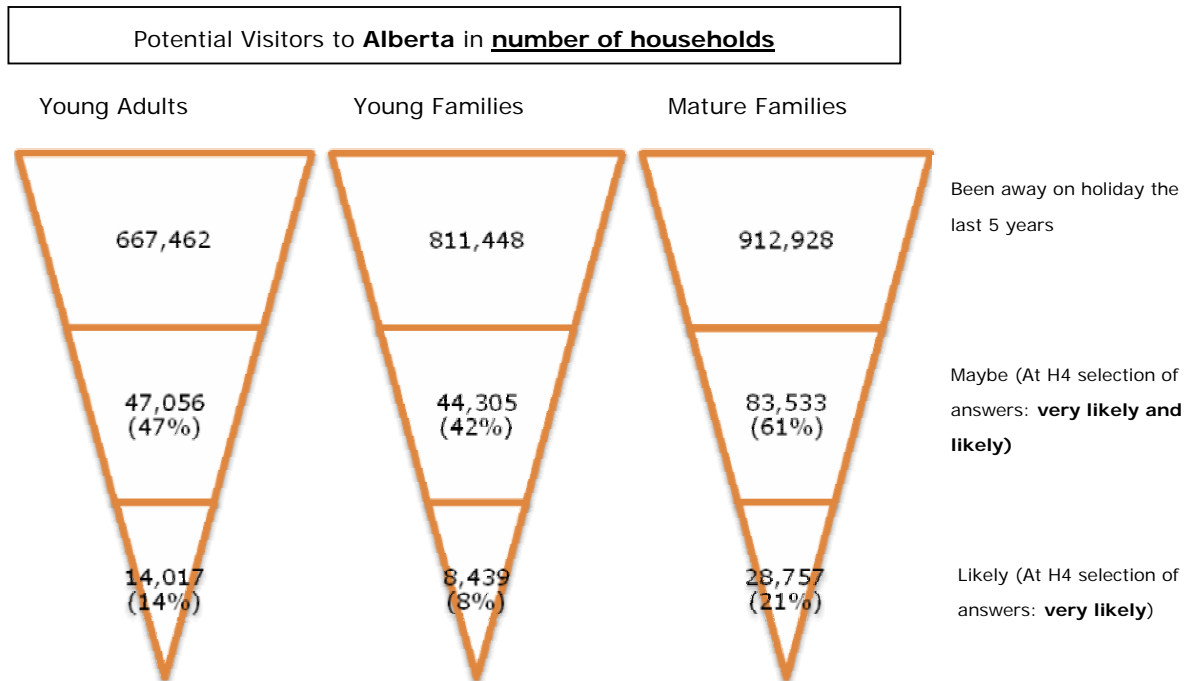
3,448,839 persons. Based on this study, 63% of the Young Adults, 46% of the Young Families and 45% of the Mature Families went on holiday outside Europe in the past five years. These figures are the basis for calculation of the potential visitors in persons to Western Canada.



**Figure 40. Potential Visitors to Western Canada in number of persons**

## 6.2 Potential Visitors to Alberta

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



**Figure 41. Potential Visitors to Alberta in number of households**

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

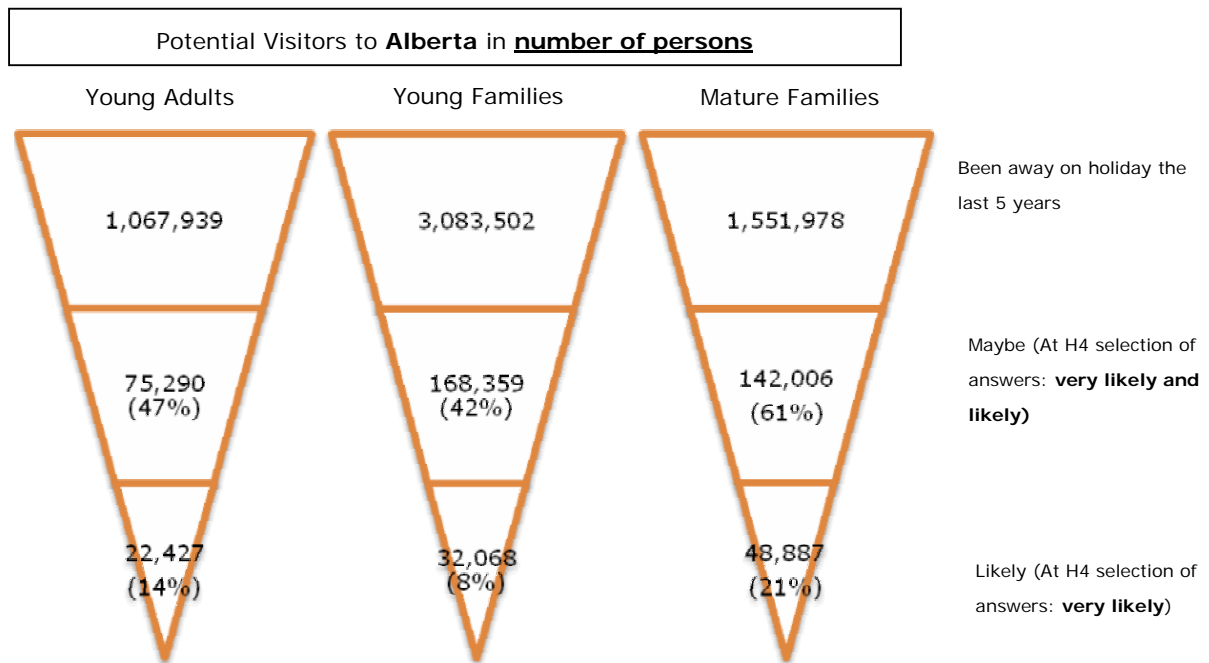
Young Adults have the second highest calculated potential. As revealed in section 5.1, their intention to visit Western Canada in the future is the highest of the three groups. Seventy one percent of Young Adults have definitely decided to visit Western Canada, intend to visit Western Canada in the next 3 or 4 years, or intend to visit Western Canada in the future, but do not know exactly when.

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

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

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

A similar calculation is made in number of persons.



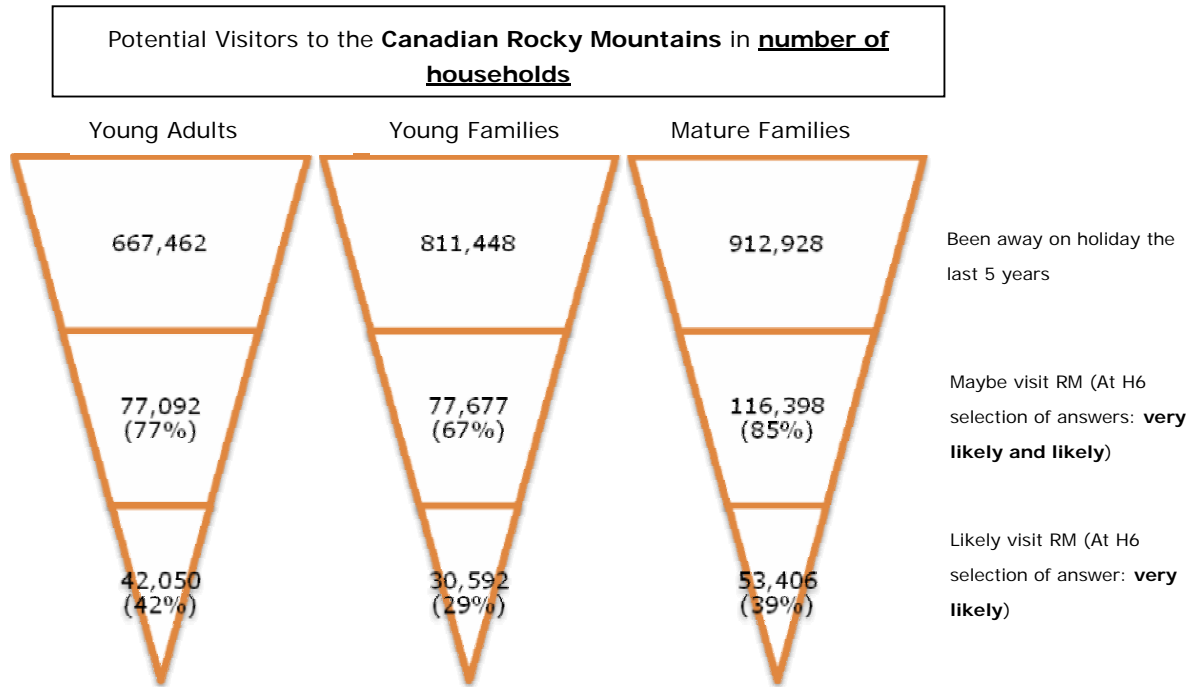
**Figure 42. Potential Visitors to Alberta in number of persons**

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

### 6.3 Potential Visitors to the Canadian Rocky Mountains

Section 5.2 shows that there is a large difference between the intention to visit Alberta and the intention to visit the Canadian Rocky Mountains. The potential for the Canadian Rocky Mountains is calculated on the following page. The first layer of the pyramid consists of Dutch travellers who have been on a holiday outside Europe in the last five years. The second layer consists of Dutch travellers who intend to visit Western Canada in the next four years and indicated that it is likely or very likely that they will visit the Rocky Mountains. The last layer consists of Dutch travellers who intend to visit Western Canada in the next four years and

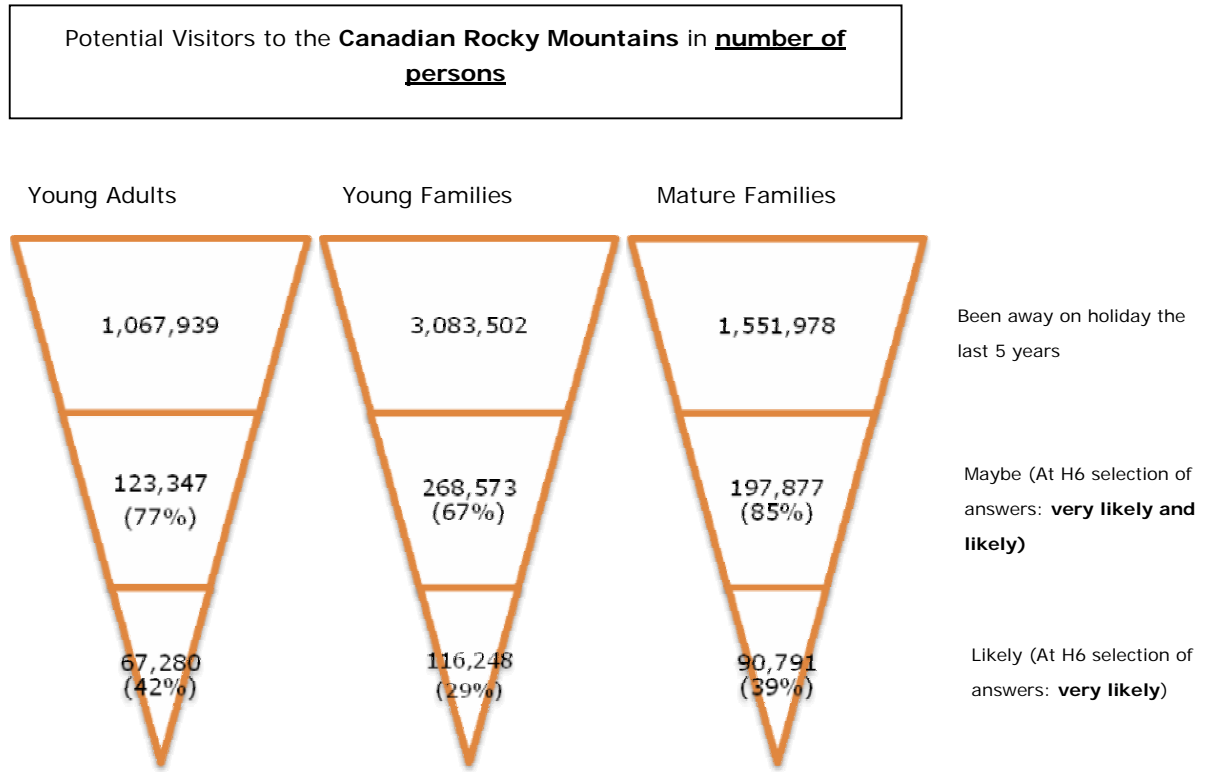
indicated that it is very likely that they will visit the Canadian Rocky Mountains.



**Figure 43. Potential Visitors to the Canadian Rocky Mountains in number of households**

As revealed in section 5.2, nearly 80% of the respondents, particularly Young Families and Mature Families, are likely or very likely to visit the Canadian Rocky Mountains. As figure 16 shows, the potential for the Rocky Mountains is much higher than for Alberta. Although the calculated potential is low for Alberta amongst Young Families, the potential for the Canadian Rocky Mountains is much higher amongst this group.

A similar calculation is made in number of persons.



**Figure 44. Potential Visitors to the Canadian Rocky Mountains in number of persons**

## 7. TRAVEL ALBERTA

This section gives insight into the awareness of Travel Alberta and the opinions of Dutch travellers regarding the Dutch Travel Alberta website ([www.travelalberta.nl](http://www.travelalberta.nl))

### 7.1 Awareness of Travel Alberta

Awareness of Travel Alberta is extremely low in all three life stage groups. This is to be expected, since awareness of Alberta is also quite low.

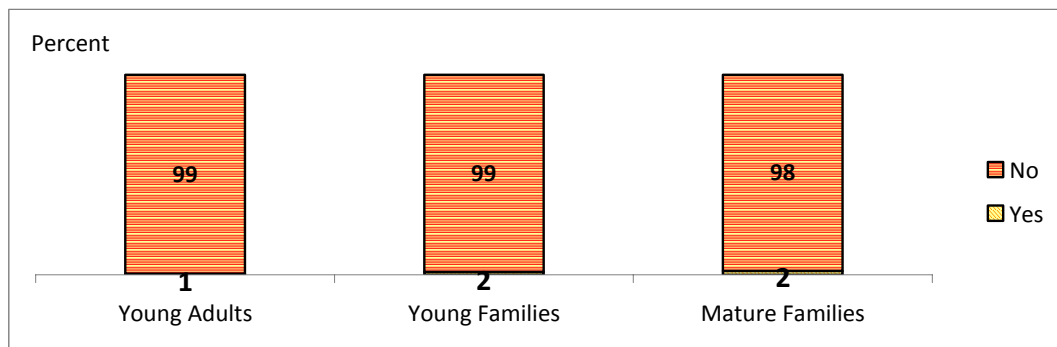


Figure 45. Are you familiar with Travel Alberta?

Fourteen respondents who were aware of Travel Alberta were asked if they recalled Travel Alberta's slogan, "Home of the Canadian Rockies". Twelve respondents could not remember the slogan without prompting. The remaining two respondents gave an incorrect answer.

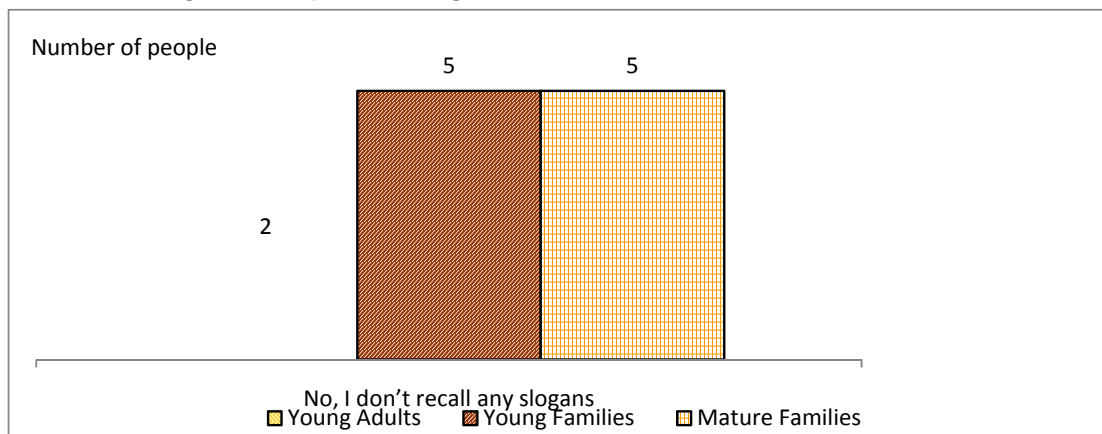


Figure 46. Do you remember the Travel Alberta slogan? (spontaneously) (Please note reporting in number of people)

The number of Mature Families able to pick the Travel Alberta slogan out of a list was highest.

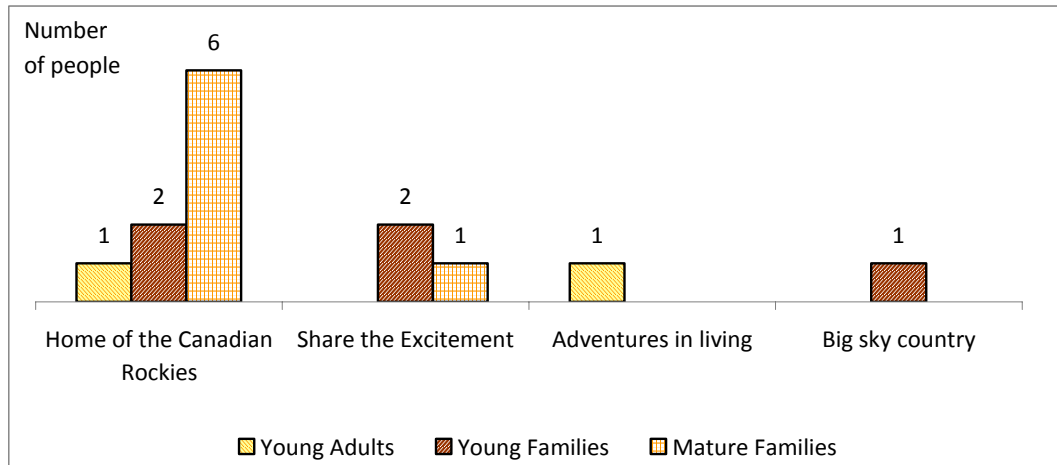


Figure 47. Which of the slogans below do you think belongs to Travel Alberta? (Please note reporting in number of people)

## 7.2 The Travel Alberta website

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

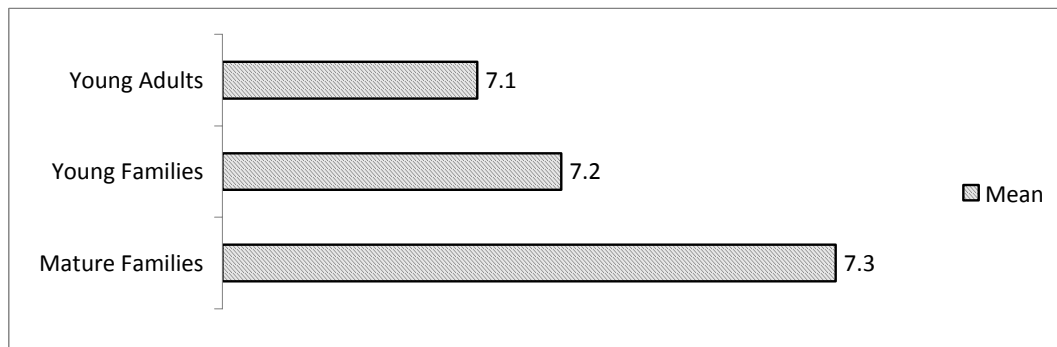
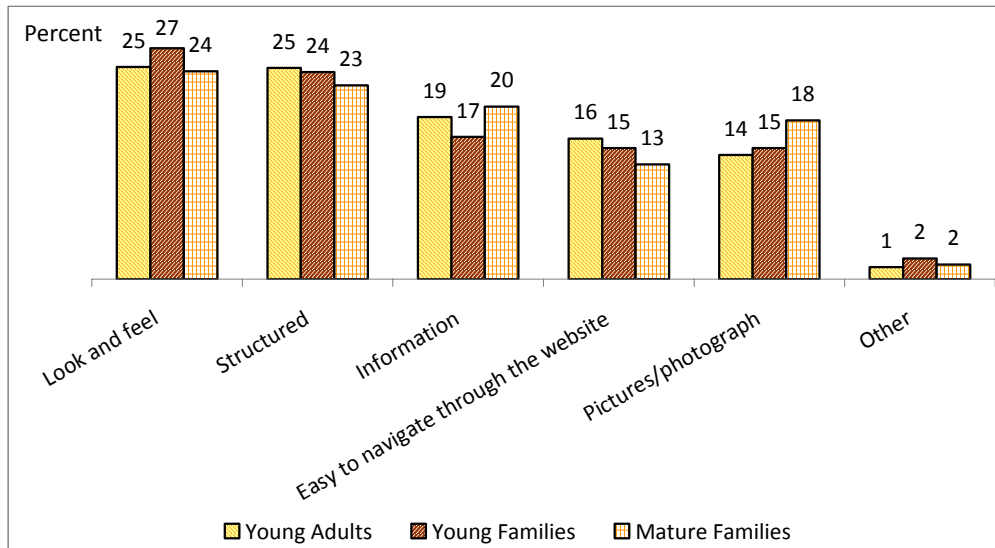


Figure 48. How would you rate the website?

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





**Figure 49. What is your rating based on?**

Between 38% and 50% of the respondents in the three life stage groups indicated that the website had a positive impact on their perception of Alberta. The fact that these percentages are so high is another indication of how positively the website is received. The percentage of respondents in the Mature Families life stage group positively influenced by the website is lower than in the other life stage groups. However, other research<sup>3</sup> reveals that this group is generally more critical in its assessment of advertising and promotion material.

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

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

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

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

<sup>3</sup> Forrester Research, 2006

The website made a very good impression in all three life stage groups and should definitely be used to promote Alberta.

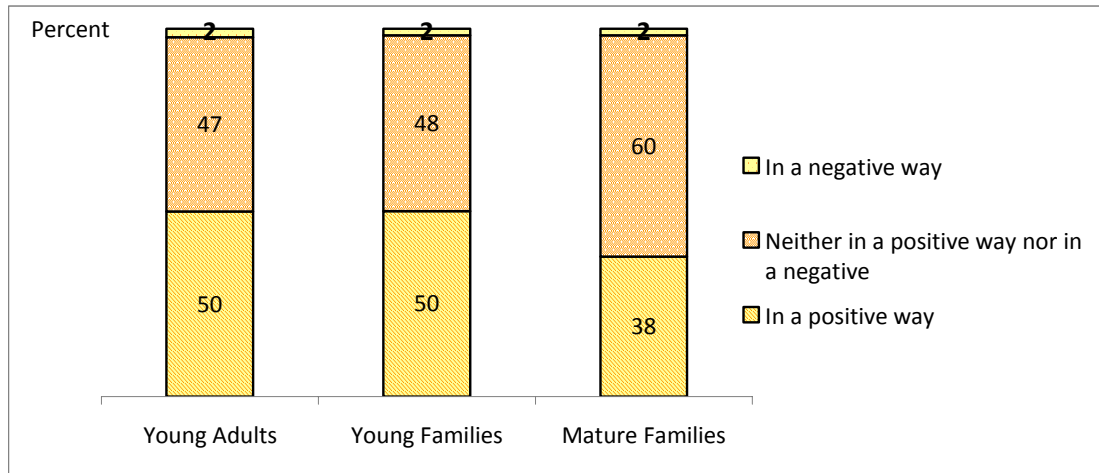


Figure 50. Does this website influence your image of Alberta ...

Although the respondents were positive about the website in overall terms, the site does not change Alberta's image as a vacation destination. Most of the respondents still believe that Alberta is 'boring' or 'corny' after seeing the website.

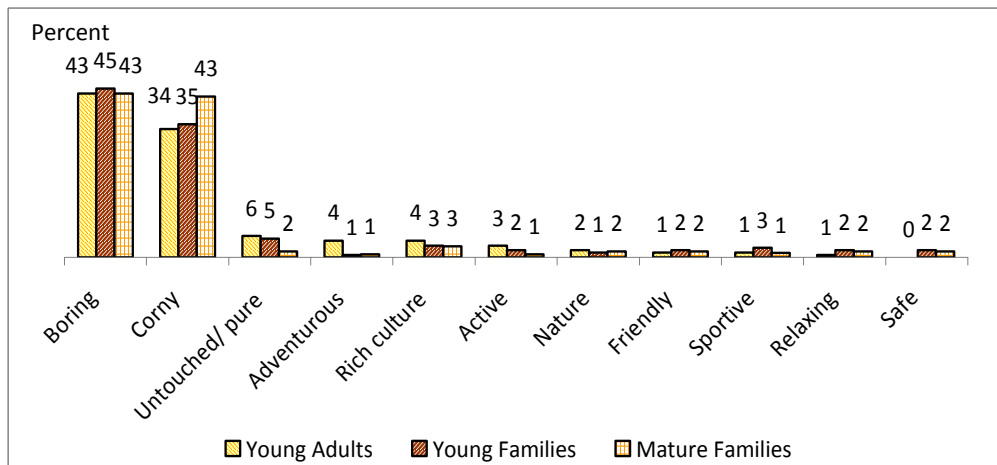
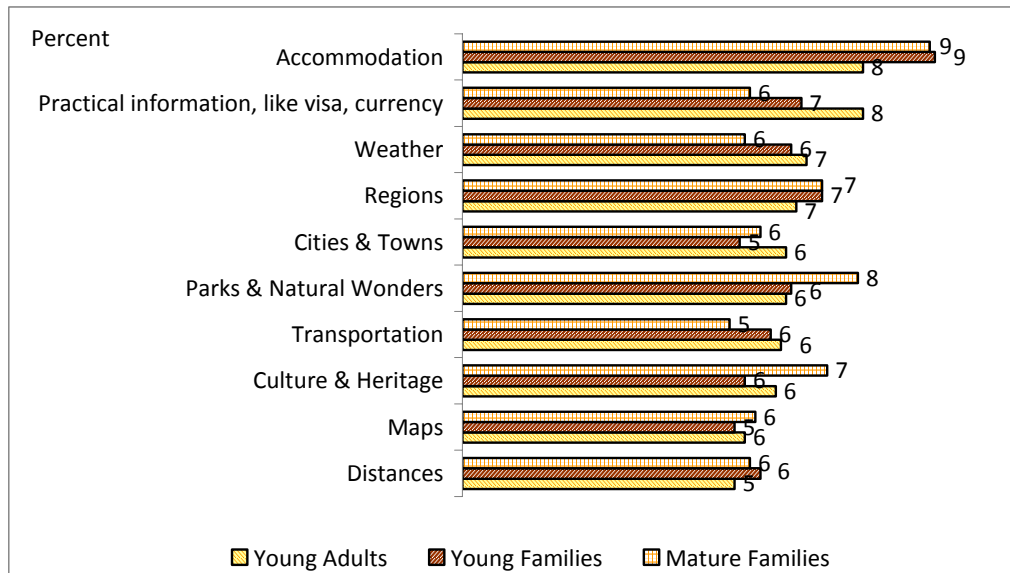


Figure 51. Based on the website, what is your image of Alberta as a vacation destination?

When asked what information they would require when considering a vacation in Alberta, the respondents gave a wide range of answers. Not one type of information can be singled out as the most important type of information. Information on accommodation is the most frequent response, but is still mentioned by just 9% of the respondents.



**Figure 52. What kind of information is important to you when considering a vacation in Alberta? (Top 10 score)**

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

Actually searching for practical information on Alberta on the Travel Alberta website is an activity that comes later in the decision-making process (i.e. after the decision to travel to Alberta is made). For this reason, it is recommended that the website present material such as beautiful photographs of nature, wildlife and other attractions first and to present more practical information on accommodation, weather, regions and cities second (layer the information).

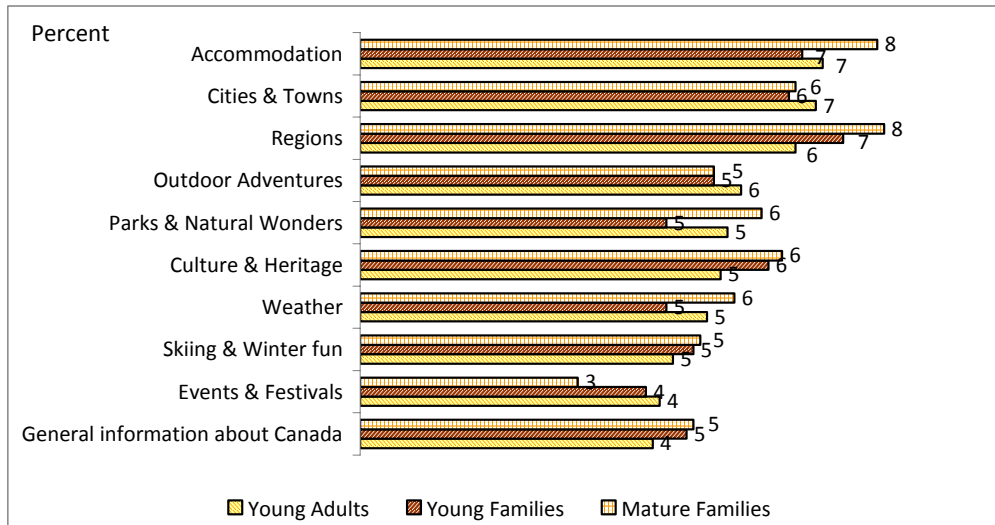


Figure 53. What information did you find on the website? (Top 10 score)

The majority of the respondents had no suggestions for improving the website. Young Adults had the most suggestions for improving the website.

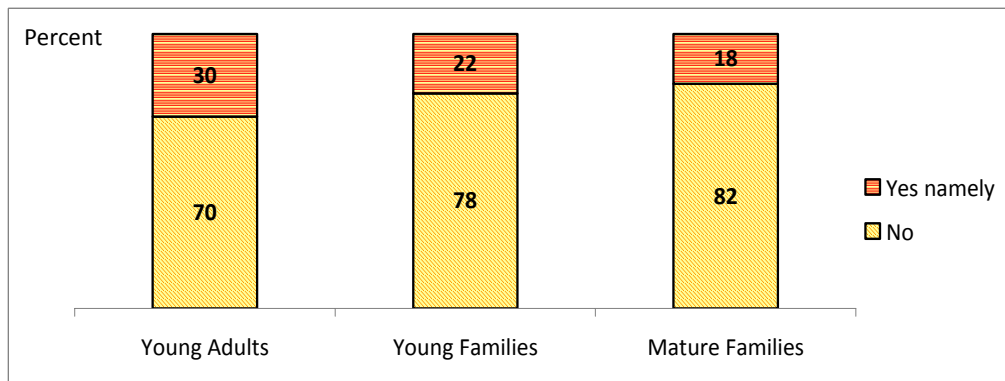


Figure 54. Do you have any suggestions for improving the Travel Alberta website in general?

Most of the suggestions for improvements related to the site layout (28%). The respondents suggested using different colours, more photographs, larger fonts and other fonts. Fourteen percent of the respondents stated that the information on the site should be presented in Dutch, while 5% stated that the amount of text on the site should be decreased or that the option of booking via the site should be added. Thirteen percent stated that they had suggestions, but did not actually give any.

## 8. MEDIA BEHAVIOUR

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

### 8.1 Television

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

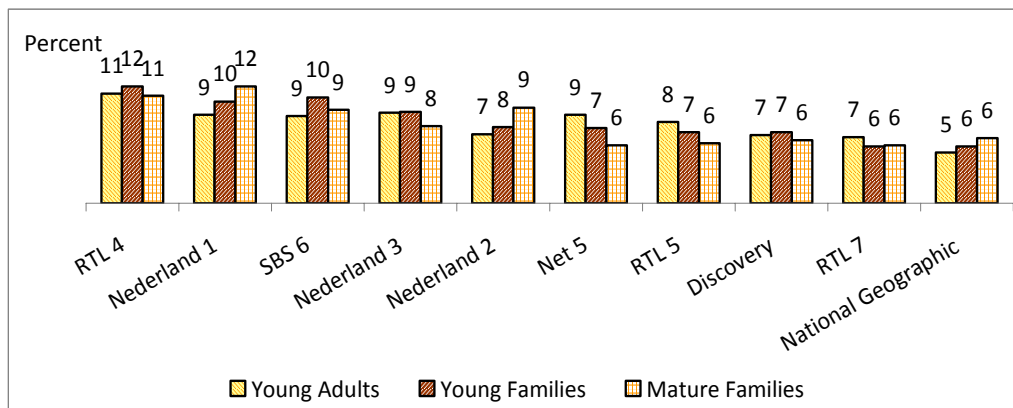


Figure 55. Please indicate which TV channels you watch regularly? (TOP 10)

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

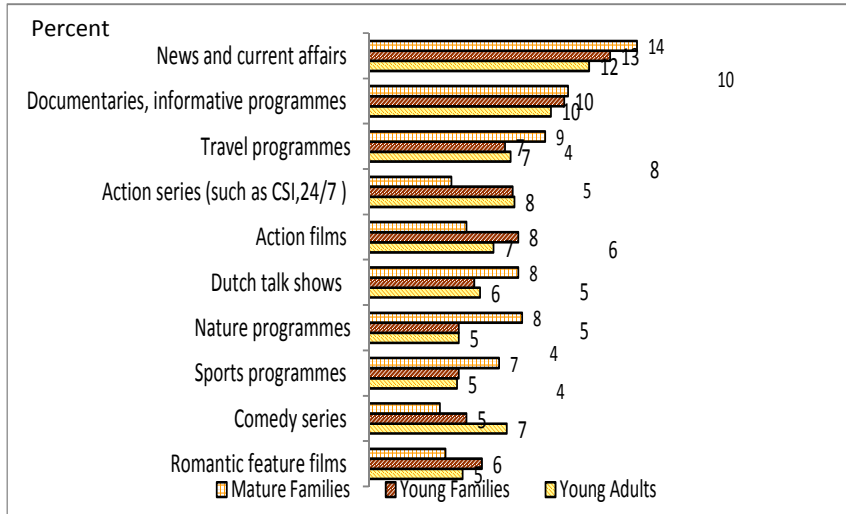


Figure 56. What type of television programs do you watch regularly? (TOP 10)

## 8.2 Radio

Radio 538, Sky Radio, 3Fm and Q-music are the most popular radio stations with the three life stage groups. Their preferences mirror those of the general Dutch population<sup>4</sup>. Mature Families listen to Radio 1, Radio 2 and regional radio channels more frequently than the other life stage groups.

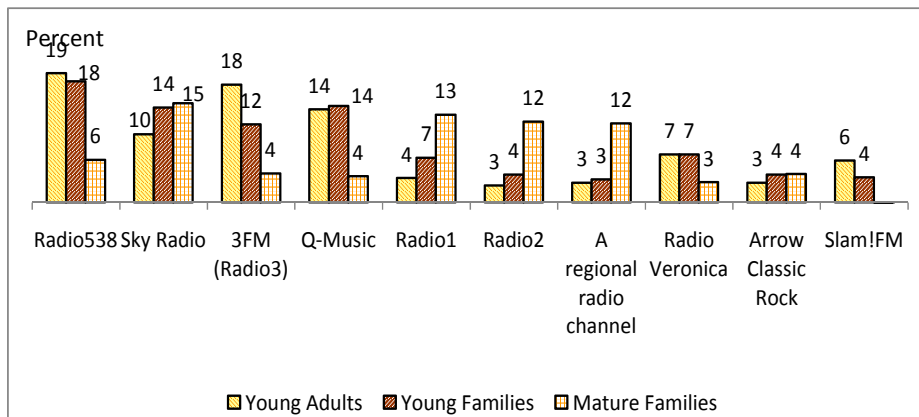


Figure 57. Which radio stations do you listen to regularly? (TOP 10)

<sup>4</sup> DGM, 2007

### 8.3 Internet

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

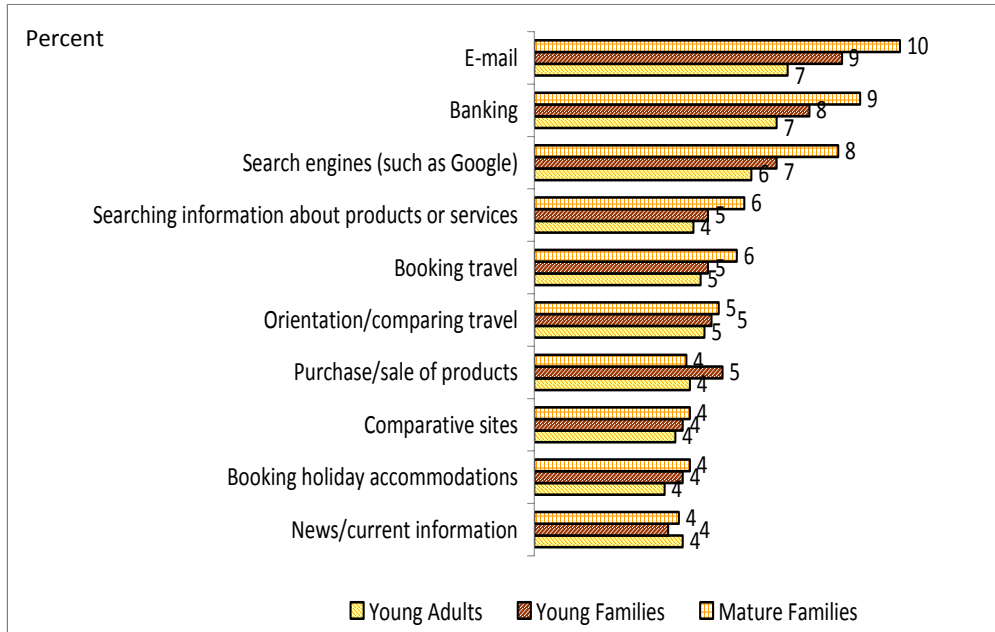
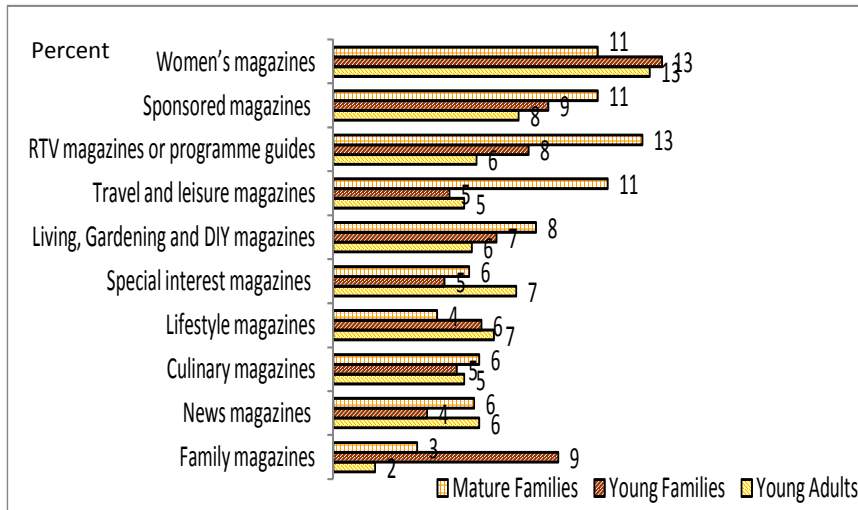


Figure 58. What do you use the internet for? (TOP 10)

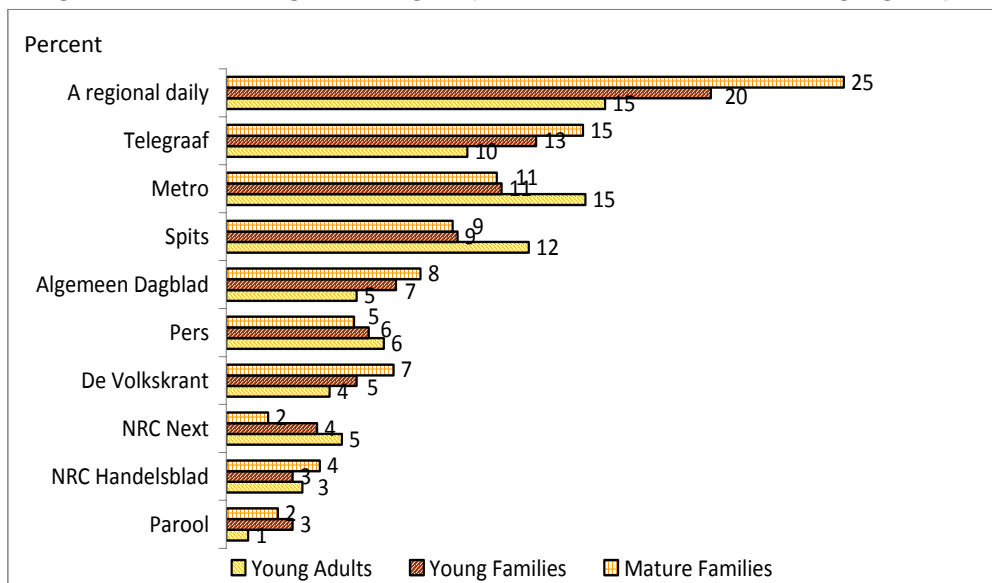
### 8.4 Magazines and Newspapers

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



**Figure 59. Which magazines do you read regularly? (TOP 10)**

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



**Figure 60. Which newspapers do you read regularly? (TOP 10)**



## 9. CONCLUSIONS & RECOMMENDATIONS

### 9.1 Overall conclusions

#### Information gathering, sources and bookings

- The Dutch consumer does not book vacations outside of Europe on impulse. They usually book 2 to 6 months in advance.
- The Dutch inform themselves well and consult multiple sources.
- Several sources are consulted for information, such as the internet, travel agencies, family and friends, travel programmes on television and travel books.
- Word-of-mouth plays the role of key influencer at different stages in the information gathering and decision-making process for vacation destinations. Word-of-mouth influence is found in the personal experience of travel TV programme hosts, in personal reviews on the internet, in personal experiences in magazines and books (often with photographs), and in the first-hand experiences of friends, family, and travel agency employees.
- The internet is the most preferred booking mechanism among all three life stage groups.
- The role of the non-specialized travel agencies is important: over 80% of the members in all three life stage groups who book their vacation outside Europe via a travel agency do so at a non-specialized travel agency with a broad offer of vacation products.
- The Dutch often visit a non-specialized agency when they have not yet chosen a destination. Once they have chosen a destination, they are more likely to visit a specialized travel agency.

#### Awareness of and travel behaviour in Alberta

- Consumer awareness of Alberta is currently low.
- The main reasons for visiting Alberta are nature and the Canadian Rocky Mountains.
- Eighty one percent of the Dutch travellers who have visited Alberta during the past five years combined their trip to Alberta with a visit to British Columbia. The time spent in Alberta is often limited to the Rocky Mountains and environs: Banff, Jasper, Lake Louise and sometimes Calgary and Edmonton.

#### Intention to visit Alberta and the Canadian Rocky Mountains

- The overall intention to visit the Canadian Rocky Mountains is much higher than the intention to visit Alberta. This results in a higher calculated potential for the Canadian Rocky Mountains than for Alberta. This shows the lack of awareness of Alberta on the one hand and much greater awareness and popularity of the Rocky Mountains

on the other. Furthermore, it highlights the fact that Dutch travellers are unaware that the Rocky Mountains are located in Alberta.

- The calculated potential for visiting Western Canada, Alberta and the Rocky Mountains is highest for the Mature Families group and the Young Adult group and lowest for the Young Families group.

#### Dutch Travel Alberta website

- Although in overall terms the website was positively evaluated, (well structured, easy to navigate, good information on a variety of subjects), the site does not change Alberta's image as a vacation destination. Most of the respondents feel that Alberta is 'boring' or 'corny' after seeing the website.

#### **9.2 Size and potential of the Dutch tourism market**

- According to the Dutch government statistics bureau (CBS, Statline), there were 7,190,543 households in the Netherlands on 1 January 2007. These households can be divided into the three life stage groups used in this study as follows: the Young Adults group accounts for 1,059,464 households, the Young Families group accounts for 1,764,017 households and the Mature Families group accounts for 2,028,729 households. According to the research, 63% of the Young Adults, 46% of the Young Families and 45% of the Mature Families went on vacation outside Europe in the past five years.
- The results of this study reveal that there is potential amongst the Dutch population to travel to Alberta. According to the study, 15% of the Young Adults, 13% of the Young Families and 15% of the Mature Families intend to visit Western Canada in the next one to four years. Of those intending to visit Western Canada, 14% of the Young Adults, 8% of the Young Families and 21% of the Mature Families are likely or very likely to visit the province of Alberta. Intentions to visit the Canadian Rocky Mountains are much higher, at 42% amongst Young Adults, 29% amongst Young Families and 39% amongst Mature Families.
- In 2006, 37,000 Dutch tourists visited Alberta and spent \$28 million in the province (2006 International Travel Survey, Statistics Canada and Alberta Tourism, Parks, and Recreation). Based on the results of this study, just over 51,000 Dutch households may be considered potential visitors to Alberta. When the number of potential visitors to Alberta for each of the three life-stage groups is combined, the total is 103,382. Assuming spending patterns similar to those of visitors in 2006, these tourists will spend approximately \$78 million in Alberta (based on an average length of stay of 10 nights in the province).

### 9.3 Effective reach and messaging for the Dutch travelling population

- It is recommended that Travel Alberta focus on the Young Adults and Mature Families life stage groups. They have the greatest potential to visit Alberta and the Rocky Mountains in the (near) future. Moreover, Alberta fits the travel motivations of these life stage groups best: nature and sightseeing. In addition, Mature Families appear to remain an interesting target group: overall they spent more time at a destination (they take longer holidays) and have good financial resources. Shifting focus to Young Adults also has the potential to 'modernize' Alberta's corny and boring image.
- People interested in visiting Western Canada, and Alberta in particular, are generally interested in nature and sightseeing. The main attraction in Alberta is the Rocky Mountains. A central role for the Canadian Rocky Mountains in the promotion of Alberta is recommended.
- Eighty one percent of the visitors to Alberta also visit British Colombia on the same trip. Cooperation with Tourism British Colombia in marketing Western Canada would strengthen Alberta's position in the Dutch market.
- Word-of-mouth is a key influencer. Therefore, it is recommended that word-of-mouth be incorporated into marketing initiatives directed to Dutch travellers. Visual communication channels seem most suitable, since they are able to contain both 'personal experience' and 'atmosphere.' Examples are: a TV programme hosts who shares his/her personal experience of the trip, personal reviews on the internet, personal experiences written up in magazines and books (often with photographs), and first-hand experiences of travel agency employees.
- The Dutch use many sources to inform themselves about a vacation destination. Using a variety of sources to raise awareness and interest for Alberta is therefore recommended.
- Interesting touch points for the promotion of Alberta are:
  - TV and radio advertising: TV and radio are effective in reaching the different life stage groups. Unlike radio, TV also provides a good channel to communicate atmosphere of the destination to trigger interest.
  - Sponsorship: This is another way of using TV and radio with the advantage of lower costs than TV and radio advertising.
  - Travel agents: Many of the people who visit travel agents visit a travel agent with a broad offer of vacation destinations (non-specialized). Travellers often visit a non-specialized agent when they do not have clear idea of their destination, which means that

they can be influenced by a well-informed agent. To generate enthusiasm in the travel trade and to give travel agents a better idea of what Alberta has to offer, special trips to Alberta could be organized for travel agents.

- Internet search engines: These are often used for researching travel destinations *and* making bookings; search engine advertising is therefore relevant and recommended.
- Banners on travel web sites are recommended.
- Dutch Travel Alberta website: Overall, it is important to communicate the existence of the Dutch Travel Alberta website. The website already gives plenty of information about Alberta, but not many people are aware of it. The site needs to be promoted to generate more traffic. Without traffic, the site is not an effective promotional vehicle. Other recommendations are:
  - The overall look and feel of the website, the logo and the photographs portray a somewhat old-fashioned impression and thus strengthen the dullness and corniness of Alberta's image. It is recommended that the look and feel of the website be improved to resolve the corny and boring image.
  - Searching for practical information on Alberta on the Travel Alberta website is an activity that comes later in the decision-making process; that is after the decision to travel to Alberta is made. For this reason, it is recommended layering the website to present material such as beautiful photographs of nature, wildlife and other attractions first and to present more practical information on accommodation, weather, regions and cities second.
  - The Travel Alberta website not only offers an opportunity to show off the landscape with beautiful photography, but can also be used to present first-hand recommendations from consumers who have already visited Alberta. An interactive area should be included on the site where visitors can upload their stories and photographs of their visit to Alberta. Good reviews from travellers who have already visited Alberta will have a positive impact on Alberta's image.
- Hotels: The option of forming alliances with hotel chains could be worthwhile. Hotels are the preferred accommodation for most travellers (in general) and they are often booked in advance.

## APPENDIX

### Questionnaire

Administered during the last week of January 2008

*Sample:*

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

- Young Adults: households made up of one or more person(s) aged 18-35, with no children in the household (may include single member households).
- Young Families: households made up of more than one person aged 25-49, with at least one child under the age of 18 years living at home full time.
- Mature Families: households made up of one or more person(s) aged 50-74, with no children in the household (household members may be single/never married, widowed, divorced, separated, married/common law, and so forth).

*Fieldwork:*

n= 340 Young Adults

n= 340 Young Families

n= 340 Mature Families

*Introduction to the Alberta questionnaire*

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

The questionnaire will take approximately 20 to 25 minutes.

Thank you for your time!

#### **PART S: SELECTION**

*<No return>*

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

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

#### **PART A: TRAVEL BEHAVIOUR**

*<No return>*

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

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

*<No return>*

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

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

*<No return>*

A3. What type of holiday do you prefer?

*<randomize>*

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

## **B: ORIENTATION & BEHAVIOUR**

*<No return>*

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

*<multiple answers possible>*

*<randomize>*

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

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

*<No return>*

*<In case of holiday fairs under B1 >*

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

*<multiple answers possible>*

*<randomize>*

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

- Other fair, namely

*<No return>*

*<In case of travel programmes under B1>*

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

*<multiple answers possible>*

*<randomize>*

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

*<No return>*

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

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

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

*<No return>*

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

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

*<multiple answers possible> <randomize>*

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

*<No return>*



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

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

*<No return>*

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

*<randomize>*

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

*<No return>*

*<In case of travel agency under B7>*

B8. What kind of travel agency?

*<randomize>*

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

*<No return>*

*<In case of without travel agency under B7>*

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

*<multiple answers possible> <randomize>*

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

*<No return>*

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

*<randomize>*

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

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

*<No return>*

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

*<randomize>*

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

*<No return>*

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

*<randomize>*

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

#### **C: TRAVEL MOTIVATION**

*<No return>*

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

*<maximum of 3 answers possible>*

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

*<No return>*

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

*<randomize>*

*<maximum of 3 answers possible>*

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

*<No return>*

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

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

#### D: FAMILIARITY WITH ALBERTA

*<no return>*

D1. Have you ever heard of Alberta?

*<randomize>*

- Yes, it is a country
- Yes, it is a city

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

*<no return>*

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

*<randomiseren>*

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

**E: CANADA: VISIT, MOTIVATION, BEHAVIOUR**

*<no return>*

E1. Have you ever been on holiday to Canada?

- Yes
- No

*<no return>*

*<In case of no under E1>*

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

*<multiple answers possible> <randomize>*

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

*<no return>*

*<In case of yes under E1>*

E3. How long did you stay in Canada?

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

*<no return>*

*<In case of yes under E1>*

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

- Tour
- Stayed in one place

*<no return>*

*<In case of yes under E1>*

E5. What were your motivations to go to **Canada**?

*<multiple answers possible> <randomize>*

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

*<no return>*

*<In case of yes under E1>*

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

*<multiple answers possible> <randomize>*

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

**F: ALBERTA: VISIT, MOTIVATION, BEHAVIOUR**

*<no return>*

*<In case of yes under E1>*

F1. Have you ever been to Alberta?

- Yes
- No

*<No return>*

*<In case of no under F1>*

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

*<randomize> <multiple answers >*

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

*<no return>*

*<In case of yes under F1>*

F3. How long did you stay in Alberta?

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

*<no return>*

*<In case of yes under F1>*

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

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

*<no return>*

*<In case of yes under F1>*

F5. What were your motivations to go **to Alberta**?

*<multiple answers possible> <randomize>*

- Friendly population
- Political climate
- Security
- Good infrastructure
- Good facilities
- Good accommodations/camping possibilities

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

*<no return>*

*<In case of yes under F1>*

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

*<multiple answers possible> <randomize>*

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



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

*<no return>*

*<In case of yes under F1>*

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

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

*<no return>*

*<In case of yes under F1>*

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

*<randomize><multiple answers >*

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

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

#### G: TRAVEL ALBERTA

*<no return>*

G1. Are you familiar with Travel Alberta?

- Yes
- No

*<no return>*

*<In case of yes under G1>*

G2. Do you remember the Travel Alberta slogan?

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

*<no return>*

*<In case of yes under G1>*

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

*<randomize>*

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

#### H: FUTURE TRAVEL PLANS

*<no return>*

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

- Yes
- No, not yet, but I plan to in the next 3 or 4 years

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

*<no return>*

*<In case of no under H1 >*

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

*<randomize> <multiple answers are possible>*

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

*<no return>*

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

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

*<randomize> <multiple answers are possible>*

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

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

*<no return>*

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

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

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

*<no return>*

*<In case of (very) unlikely under H4>*

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

- ....

*<no return>*

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

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

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

**TRAVEL ALBERTA.NL**

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



- Friendly
- Sportive
- Untouched/ pure
- Safe

*<no return>*

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

*<randomize, multiple answers are possible>*

Information on:

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

*<no return>*

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

*<randomize, multiple answers are possible>*

- Accommodation
- Dinning & Shopping
- Cities & Towns
- Regions
- Weather
- History of Alberta

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

*<no return>*

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

- Yes, namely....
- No

*<no return>*

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

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

#### **J: MEDIA BEHAVIOUR**

*<no return>*

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

*<randomize, multiple answers are possible>*

- Nederland 1
- Nederland 2

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

<no return>

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

<randomize, multiple answers are possible>

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

**K: Radio**

<no return>

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

<Multiple response>, <randomize>

- Radio 1



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

#### **INTERNET**

*<no return>*

L1. What do you use Internet for?

*<randomize, multiple answers possible>*

- E-mail
- Banking
- Job search
- House search
- Visiting sports sites
- Comparative sites
- News/current information
- Downloading Software
- Visiting news groups
- Chatting/ MSN
- Searching information about products or services
- Purchase/sale of products (for instance: *Marktplaats*)
- Downloading music/films/games
- Telephoning (Skype)
- Booking travel
- Reading online magazines/newspaper
- Listening to the radio
- Watching TV programmes (for instance on *Uitzending gemist*)
- Visiting/ reading we logs (for instance: *Geen Stijl, blogspot*)
- Visiting sites of friends (for instance: *Hyves, MySpace*)
- Viewing video films (such as on *Youtube, ftv.nl*)
- Visiting dating sites (for instance: *Relatieplanet*)
- Search engines (such as Google)
- Orientation holiday accommodations
- Orientation airplane tickets
- Booking holiday accommodations

- Booking airplane tickets
- Other, namely....
- Don't know

<no return>

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

- .....

<no return>

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

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

#### M: MAGAZINES

<no return>

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

<randomize, multiple answers possible>

- RTV magazines or programme guides
- Management magazines (For instance: *Management Team*)
- News magazines (For instance: *HP/ De Tijd*)
- Women's magazines
- Men's magazines
- Children's magazines and magazines for young people
- Family magazines
- Special interest magazines (Magazines focussing on specific themes, such as *National Geographic*)
- Sponsored magazines (Such as *Allerhande*)
- Living, Gardening and DIY magazines
- Culinary magazines
- Child-raising magazines
- Travel and leisure magazines
- Sports magazines
- Other, namely...
- Do not read magazines
- Don't know

**N: NEWSPAPERS**

*<no return>*

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

*<randomize, multiple answers possible>*

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

*<no return>*

*<conditions:*

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

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

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

**Background details:**

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

Thank you for participating!

**<end of questionnaire>**