

MARKET POTENTIAL FOR DUTCH TRAVELLERS TO VISIT ALBERTA, CANADA

CONSUMER FOCUS GROUPS REPORT

MARE Research team: Kimm Scholten, Dewy Heiser & Liesbeth Gerritsen
Client: Alberta Tourism, Parks and Recreation and Travel Alberta
Report Date: April 2008

CREATIVE WAYS TO SOLID DECISIONS



TABLE OF CONTENTS

EXECUTIVE SUMMARY _____	3
1. METHODOLOGY _____	6
1.1 Background _____	6
1.2 Overall research objectives _____	6
1.3 Methodology _____	6
1.4 Disclaimer _____	7
2. RESULTS _____	8
2.1 Trip planning behaviour _____	8
2.2 Means of transportation and activities in Alberta _____	12
2.3 Perception, awareness and knowledge of Alberta _____	14
2.4 Training video _____	17
2.5 Future travel plans _____	18
3. CONCLUSIONS AND RECOMMENDATIONS _____	19
3.1 Conclusions _____	19
3.2 Recommendations _____	20
3.3 Point of discussion _____	21
APPENDIX _____	22

EXECUTIVE SUMMARY

Trip planning behaviour

- Canada overall is not a top-of-mind holiday destination. The Dutch traveller needs the enthusiasm of a third party to make Canada (and Alberta) a top-of-mind vacation destination.
- First hand experiences of family, friends, travel agency employees, a host of a television show, photos in magazines and books, and programmes on television, are the most important triggers in raising initial interest in Canada
- Dutch consumers prepare carefully for their trip to Canada. They believe that this is necessary because they lack knowledge of the immense country and its possibilities
- Several sources are consulted for information: internet, travel agencies, family and friends, television programmes, travel fairs ('vakantiebeurs'), travel books and the Canadian embassy
- The internet and travel agencies are considered the most important sources of information. The internet provides very extensive information on a wide variety of subjects and is always available (allowing travellers to gather information whenever they want it). Travel agencies offer brochures, guides and personal advice

Perception of Canada and Alberta, travel motivation and travel behaviour

Perception:

- Most Dutch travellers do not consciously choose Alberta as a destination because awareness of Canada and its provinces is low in the Netherlands. Dutch travellers more or less 'discover' Alberta at the end of the decision-making process. Initial interest is often aroused for Canada in general. After gathering information on Canada and the possibilities it offers, the traveller discovers Alberta as a part of Western Canada and 'home of the Canadian Rockies'
- The lack of awareness of Alberta automatically results in a relatively blank image of Alberta amongst Dutch travellers. They do not have a clear perception of the province. Their perception is often based (and therefore limited) on the general perception they have of Canada as a whole (Canada=Alberta)

Travel motivation:

- The motivations for choosing Alberta and Western Canada are similar: need for nature and wildlife, rest and relaxation, peace and quiet, safety, adventure (visiting unknown territory), visits to friends and family, presence of friendly and helpful people
- A motivation that is specific to Alberta is the Rocky Mountains
- All of the respondent's expectations were exceeded when they actually visited Alberta. They experienced Alberta as more

immense, magnificent, rugged, mystic, peaceful, quiet, pure, healthy, clean, relaxed, natural and friendly than they could ever have imagined beforehand

- Alberta is sometimes also perceived as a bit boring. Boring in this context means quiet, limited diversity in landscapes (note: most respondents only experienced the Rocky Mountains) and lack of vibrant cities and entertainment

Travel behaviour:

- Dutch travellers who have visited Canada describe themselves as adventurous (which means that they leave certain parts of their itinerary open, primarily accommodation and activities), but they are actually rather 'safe' travellers in that the route they travel and the time that they spend at places along that route is generally fixed. When travelling independently by car or camper, they are free to move around more impulsively and stay an extra day at a given location, for instance. During the high season in Canada, however, they have less freedom to be impulsive and adventurous because hotels and campsites are fully booked
- Dutch travellers go through an intensive information gathering process before embarking on a trip to (Western) Canada. However, the Dutch travellers who have been to Canada lack specific and detailed knowledge of Alberta. Their visit to Alberta did teach them that there is more to do in Alberta than they were aware of in advance. Unfortunately, often it was impossible for them to fit the activities that they discovered while in Alberta into their itineraries.
- Most Dutch travellers combine a trip to Alberta with a visit to British Columbia and/or a visit to the United States
- The visit to Alberta itself is often limited to the Rocky Mountains and Alberta's national parks. The importance of nature in drawing Dutch tourists is also apparent in the other locations that Dutch travellers visit in Alberta: Jasper, Lake Louise and Banff. The Dutch traveller rarely goes any farther south or east than Calgary or farther north or east than Edmonton.

Travel Alberta training video

- The training video is not considered representative of Alberta. It lacks the quiet feel that Dutch travellers associate with Alberta and that is the main driver for visits to Alberta. The image of Alberta portrayed in the video does not fit the needs that most travellers expect Alberta to meet when they select it as a holiday destination (i.e. the need for nature and wildlife and the need for rest, relaxation and peace and quiet)
- The relative amount of attention given to the different aspects of Alberta is perceived as off-balance: too much focus on cities, events and entertainment and activities such as rodeos and cowboys and too little focus on nature, villages and rest and

relaxation. However, the fact that the video shows the diversity that Alberta offers is considered positive

Interest in Alberta as a vacation destination

- Dutch travellers who have been to Alberta are interested in visiting Alberta again. They would like to show Alberta to others, experience Alberta with others and see parts of the province that they missed during their first vacation in Alberta

1. METHODOLOGY

1.1 Background

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 motivator of the Dutch market. The research will encompass both travel trade and consumer.

1.2 Overall research objectives

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 survey with three consumer life stage profiles
- Phase 3: two focus group discussions with Dutch consumers

This report describes the findings from phase 3 of the project.

1.3 Methodology

For phase 3, two focus groups were conducted with Dutch consumers who have visited Alberta or the Canadian Rockies in the past five years. Each focus group lasted 120 minutes and was held at the MARE Research offices. One focus group consisted of members of the Young

Families life stage and one consisted of members of the Mature Families life stage:

- 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.

The guideline used for the interviews was drawn up by MARE Research and approved by Alberta Tourism, Parks and Recreation (included in the Appendix).

The research objectives for phase 3 of the study are as follows:

- To gain insight into the consumer's trip planning behaviour
- To gain insight into (previous) vacation experiences in Alberta
- To gain insight into the perception of Alberta based on visits to Alberta
- To gain insight into future travel intentions

1.4 Disclaimer

Qualitative research is indicative by nature. Findings from such studies should be taken as hypotheses and indications with a high probability level, rather than as (numerically proven) facts. In the interest of readability, however, the findings are presented in the form of factual statements in this report.

2. RESULTS

Note

Overall, no major differences were found between the Mature Families group and the Young Families group. Differences between these groups are caused more by differences in personality than in life stage. The findings below are therefore not split out based on life stage, but reported as a whole. Where differences do exist, they are specified.

2.1 Trip planning behaviour

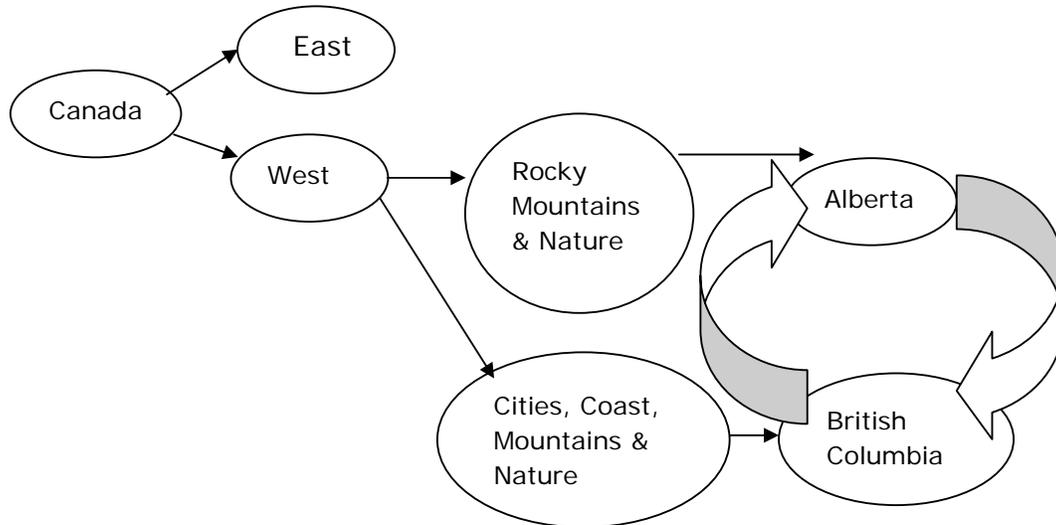
2.1.1 Familiarization and information gathering

When Dutch consumers gather information on a holiday destination, first hand experiences of others, photos in magazines and books and programmes on television are the most important triggers in raising initial interest in Canada. They convey the atmosphere of Canada and bring the destination to life in the mind of the traveller. The traveller needs the enthusiasm of a third party to make Canada a top-of-mind holiday destination.

As we learned from phase 1, initial interest often concerns Canada *in general*. This finding was to a large extent confirmed during the interviews with consumers. After familiarization and information gathering, when the traveller is better informed and has greater knowledge of the country and its possibilities, Alberta is discovered as part of Western Canada and 'home of the Canadian Rockies'. Hence, travellers do not consciously choose Alberta as a destination. This is mainly a consequence of the lack of knowledge and low awareness the Dutch have of Canada and its different provinces, including Alberta.

"We wanted to see the unspoiled nature in Canada; then you more or less automatically end up in Alberta."

For your convenience, the decision process from phase 1 is shown below:



Dutch consumers prepare carefully for their trip to Canada. They believe that this is necessary because they lack knowledge of the immense country and its possibilities. They put a great deal of effort into gathering information and consulting numerous sources of information. Travellers look into the following topics, among others:

- Where and what part of Canada they want to visit
- Means of transportation (by car, camper, bus, train, cruise along the West coast)
- Distances between places
- How much time to spend in which areas/places

2.1.2 Motivators for choosing Western Canada

As previously noted, Alberta is not consciously chosen as a destination. But the motivations for choosing *Western Canada* also apply to Alberta. Motivations are:

- Need for nature and wildlife
- Need for rest/peace and quiet and relaxation
- Need for adventure
- Visits to friends and family
- Presence of friendly and helpful people
- Need to visit a country in which travel is safe

"It is no coincidence many Dutch people immigrated to Canada; it must be an interesting and friendly country!"

- Motivations that are specific to Alberta are:
 - Rocky Mountains
 - Cheaper than British Columbia (due to lower taxes)

Visiting friends and family is a motivator, but often secondary to the need for nature and wildlife and the need for relaxation and rest. The latter two are stronger motivators in raising interest in Western Canada.

2.1.3 Level of planning

There is a difference in the extent to which the Dutch travellers *plan* their trip in advance. The difference correlates more with personality (i.e. adventure seeker or security seeker) than with life stage.

Visitors to Western Canada often describe themselves as adventurous. However, the term 'adventure' is relative, given that the Dutch can travel in a safe and structured manner through Canada because they know the language, do not need vaccinations to visit Canada and are able to take advantage of the high quality travel conditions that Canada offers. The term adventure has a subjective significance for this group of travellers:

- Visiting a place that is less well-known and different from what one is used to and therefore feels more special, extraordinary and daring
- Travelling through 'rugged' nature
- Encountering wildlife
- Travelling without planning everything in advance

In this context, a traveller with a higher need for adventure is more likely *not* to plan everything in advance than a traveller who feels a bit insecure and has a higher need for control and security. The latter tends to book items well in advance, such as transportation, the number of days per city, accommodation, and excursions.

Since planning behaviour is more a matter of personality than life stage, a couple with a 13-month old baby could travel 'adventurously' by camper without making any advance bookings, while an older couple without children could travel 'safely' and 'securely' by booking everything in advance.

"We didn't really make a plan. We rented a camper and decided once we arrived. This felt like a real adventure."

"We just drive and see where the road takes us."

Most people not travelling by camper tend to book their route and most accommodations in advance (partly because this is required due to a lack of capacity during high season).

2.1.4 Sources of information

Travellers consult many sources for information: the internet, travel agencies, family and friends, television programmes, fairs, travel books and the Canadian embassy.

Internet

The internet is perceived as one of the most important sources of information and is mainly used during familiarization and the information gathering phase and for bookings. The internet is used less often *during* the trip. The perceived advantages of this source are:

- the extended offer of information on a wide variety of subjects
- it is available at any time
- it offers a clear comparison of prices (for flights, accommodations, campers/cars, etc.)
- it offers reviews
- it offers photos that give a taste of the atmosphere

Travel agencies

Together with the internet, travel agencies are perceived as one of the most important sources of information. The travel agencies offer brochures, guides and personal advice on the destination. Some respondents explicitly prefer a specialized agency when gathering information on Canada and for booking their trip to Canada. The specialized agencies are perceived as better advisors than the non-specialized agencies. Travellers expect the specialized agencies to have greater knowledge of Canada.

"If you don't go to a specialized agency you might as well book a last minute trip directly from KLM, where you don't receive any information at all."

However, travel agencies are also sometimes literally 'used' for information. The traveller gathers the information that is required by picking up brochures and asking for information, but then actually books somewhere else, usually via the internet.

"How I see the travel agency...? Goodbye and thank you for the brochures!"

Family and Friends

Family and Friends play a very important role for travellers in familiarizing themselves with the destination. Often, it is they who trigger initial interest in Canada by sharing their 'contagious' positive experiences. Family and friends are consulted before and after the trip is booked. They are consulted for 'tips' and 'tricks' and help the traveller to decide on the length of their trip, what is nice to see and do, where to stay, how to travel, etc. Family and Friends are perceived as a trustworthy source of information since they have no commercial interest in promoting a given destination.

Television programmes

Television programmes, especially the travel television programmes (such as RTL Travel Adrenaline), are an important source of inspiration. The lively way in which the (often non-standard) destinations and their atmosphere are presented and the additional

personal experiences of the hosts raise curiosity and interest in the various destinations.

"I enjoy watching these travel programmes because they inspire me and trigger ideas for future holiday destinations. But I seldom see anything about Alberta."

Fairs

Fairs, most often the 'Vakantiebeurs in Utrecht', are visited early in the familiarization process to gather initial information on possible destinations. Travel fairs are used as a source for brochures and a source of travel inspiration.

Travel books

Travel books such as Lonely Planet are used both before and during the Dutch traveller's trip to Western Canada. They are used for general information as well as specific information on activities or accommodation.

Canadian embassy

The Canadian embassy is consulted for factual information on subjects such as visas, vaccinations and national holidays.

2.2 Means of transportation and activities in Alberta

Travel partners

The Dutch travel with various travel companions to Alberta. Some travel with a friend or group of friends, some travel with their partner, some *with* their children and some, often due to the distance, *without* their children. The travellers who leave their children at home do so because travel to a destination as far away as Canada contributes little for very young children (0-4 years old) because they are too young to realize or care where they are and are happy anywhere that they are able to play. Of course, aspects like safety and clean accommodation and restaurants for example, play a role for families who take their young children with them on vacation, but the decision to visit Western Canada is mainly driven by the desire of the parents, not the children.

"When you travel to such destinations, bringing your children feels more like a burden. It's no fun for them."

"My kid is happy with the playground around the corner from our house."

"We took our daughter to Suriname, but that was no fun for her. She would have been just as happy going to a camping park in The Netherlands."

Locations visited

Most respondents combined a trip to Alberta with a visit to British Columbia. Some combined a trip to Alberta with a trip to the United States.

The visit to Alberta itself is often limited to the Rocky Mountains, including Alberta's national parks. The tour often includes a visit to Edmonton, Jasper, Lake Louise, Banff and Calgary. The Dutch traveller rarely goes any farther south or east than Calgary or farther north or east than Edmonton. This might be explained by the limited knowledge the Dutch traveller has of what the north, south and east of Alberta have to offer or the fact that there are simply fewer travel offers that include these other parts of Alberta.

Length of stay

On average, the respondents spent 5 days to 1.5 weeks of their total available vacation time in Alberta, primarily because they had to divide their time between Alberta and British Columbia or the United States. Looking back, many of them say that they would have liked to have spent more time in Alberta because there was more to see and do there than they had expected.

Transportation

The Dutch travel by car, camper or bus. The bus is perceived as most convenient when travelling with younger children aged 4 to 8. Children in this age group tend to get bored with long confinements in a car or camper. When travelling by bus, they have more space and the opportunity to 'move around' and make friends with other children in the bus.

"Since we were travelling with the kids we opted for the bus. They can stretch their legs and move around when they get bored. They've also made friends on the bus, so that was entertaining for them!"

Travelling by camper is perceived as more exciting and flexible than travelling by bus. With a camper, travellers can stop when and where they want to and make more impulsive decisions as they travel. This gives a feeling of adventure. Moreover, one never has to look for accommodations with a camper, which adds to the feeling of freedom. However, travelling with young children in a camper is considered less attractive. The evenings are often cold, which makes it necessary to sit inside the camper and be quiet so as not to wake the children.

Most people travelling by car tend to plan their route in advance and book most accommodations (partly because this is required due to a lack of capacity during high season).

Activities

Activities that the respondents undertook during their visit in Alberta vary from walking, biking, skiing, driving and shopping to visiting parks, glaciers and the Calgary Zoo. None of the respondents mentioned activities such as the Calgary Stampede or visits to Drumheller, Dinosaur Provincial Park or aboriginal sites, but that is not particularly surprising given the fact that their visit to Alberta was limited to the Rocky Mountains and environs and that most of the respondents were unaware of these other attractions.

2.3 Perception, awareness and knowledge of Alberta

2.3.1 Perception *prior to* visit

Expectations regarding Alberta *prior to* the trip are similar to the expectations of Canada in general (i.e. rugged nature, beautiful scenery, wildlife, green, national parks, mountains, lakes, peace and quiet, fresh air and cleanliness)

2.3.2 Perception *after* visit

All of the respondent's expectations were exceeded when they actually visited Alberta. They experienced Alberta as more immense, magnificent, rugged, mystic, peaceful, quiet, pure, healthy, clean, relaxed, natural and friendly than they could ever have imagined beforehand. They have more or less become ambassadors of the particular area they visited. They are now the ones 'spreading the word' and triggering interest in Western Canada in others by sharing their enthusiastic stories.

"It is what life is supposed to be...so pure and healthy.. It should be like that everywhere in the world!"

The Dutch travellers say that they felt overwhelmed, speechless, humble, pure, healthy and free when travelling through Alberta, surrounded by the enormity of nature in the Rocky Mountains and environs. According to them, Alberta is extremely impressive – incomparable, in fact. Though they sometimes compare the scenery to Switzerland, the Alps in general, or Scandinavia, they agree that Alberta is in an entirely different league when it comes to scale. Some say that Alberta may compare to New Zealand in terms of scale.

"I felt like an explorer... It's not a common destination and is such a huge and unspoiled country."

"My wife was filming when we got around this mountain and saw this magnificent lake. You can see she was overwhelmed by the way the camera jolts at that point in the video!"

Overall, the respondents all experienced their visit to Alberta as very positive. Aspects that were perceived as less positive are the extreme drops in temperature and the amount of time it takes to get from place to place because of the enormous distances involved. However, the long drives also have a positive side: they are an opportunity to see and experience the beauty of Alberta. The fact that one can drive for hours without encountering another human being also triggers a sense of wonder and humbleness.

Alberta is sometimes also perceived as a bit boring. Boring in this context means quiet, limited diversity in landscapes (note: most respondents only experienced the Rocky Mountains) and lack of vibrant cities and entertainment. This is further clarified below.

Although the area that respondents visited in Alberta (i.e. the Rocky Mountains), is perceived as extremely overwhelming and impressive, it is more or less 'a lot of green, lakes and mountains'. In this sense, it 'lacks' diversity in the perception of some respondents, but this has mainly to do with the fact that they have no frame of reference for other parts of Alberta and are unaware of the variety that the rest of the province offers. Some respondents said they would have liked to have spent more time in Alberta because there was more to see and do there than they had expected.

Other aspects that are mentioned as possibly unattractive or boring (but were not perceived as negative by the respondents with whom we spoke) is the fact that there is not much excitement or entertainment for teenagers (respondents only visited the Rocky Mountains and environs).

"You can drive for miles and there is very little to do on the way, like clubs for teenagers, for instance."

Some respondents expected places such as Jasper to be small cities and were a bit disappointed to find villages instead, where there is relatively little to do. Although expectations were not met in such cases, labelling the experience as negative would be too strong. The fact that these places are villages is also perceived as positive because they have a relaxed and friendly atmosphere and fit the peaceful and unspoiled character of the natural surroundings.

"Everyone knows each other in such a village, which gives a very friendly and relaxed feel; you're not rushed."

Price-quality is perceived as quite similar to Europe. Moreover, Alberta is considered a bit cheaper than British Columbia, due to lower taxes.

Awareness & knowledge

As mentioned in section 2.1.1, the Dutch decide on Canada as a destination first and then discover Alberta while familiarizing themselves with Canada. Initial awareness of Alberta is low. One of the respondents visited Banff and Jasper, but was unaware of the fact that he had been to Alberta until the discussion got underway.

"I've been to the Rocky Mountains, to Banff and Jasper, but I've not been to Alberta."

"We did the standard round in Western Canada like everyone else does and only discovered Alberta while we were there."

As mentioned above, Dutch travellers go through an intensive orientation process before embarking on a trip to Western Canada. However, specific and detailed knowledge of Alberta seems limited. Not only do they have trouble summing up the places and sites they visited while they were in Alberta, they also discovered there is more to do in Alberta than they were aware of in advance (for example kayaking, rafting or caving). One respondent was disappointed that some of these activities were impossible to schedule because his accommodations and route were already fully planned and booked. There was no time for changing their itinerary to participate in extra activities, other than the ones already planned.

Hence, it can be concluded that when tours/routes would not have been completely fixed and knowledge prior to the trip on what there is to see and do in Alberta would have been higher, there would have been (some) room for a longer stay in Alberta (mostly at the expense of British Columbia), since the total travel time would normally be fixed and not possible to change.

Target group

Alberta is perceived as an interesting country for adults 30+ years without children, families with children aged 8 – 15 years and Mature Families who:

- Love nature and want relaxation and peace & quiet
- Are sporty and active
- Are down-to-earth

Alberta is perceived as less suited for:

- People who are interested in culture and history; Alberta is perceived as lacking in culture and history
- Shoppers; there are not many vibrant cities with a large selection of stores
- Sun-worshippers, due to the colder climate

- Teenagers between the ages of approximately 15 – 19; Alberta is perceived as too quiet for them since there is not much entertainment and excitement (no clubs)
- Families with young children age 0 to 6/7, mainly due to the long flight and driving distances in combination with the fact that Alberta is perceived as not having much to offer to them

2.4 Training video

Overall, the Alberta training video is not perceived as representative of Alberta. For travellers, it is wildlife, unspoiled nature and the Rocky Mountains that are representative of Alberta. Instead of highlighting these attractions, the video focuses on cities, events and entertainment, such as rodeos and cowboys.

The training video makes a rather busy impression, due both to the way in which it is filmed and the manner in which it depicts things to do in Alberta. The video lacks the quiet feel that Dutch travellers associate with Alberta and that is the main driver for visits to Alberta. The image of Alberta portrayed in the video does not fit the needs that most travellers expect Alberta to meet when they select it as a holiday destination (i.e. the need for nature and wildlife and the need for rest, relaxation and peace and quiet).

"This gives you the idea that Alberta is a province where a lot is going on. It comes across as too flashy and sophisticated; not the way I experienced it."

"It focuses on cities, but doesn't show the village-feel of Banff, for example, or Jasper."

Although the relative amount of attention given to the different aspects of Alberta is perceived as wrong, the fact that the video shows the diversity of Alberta is appreciated. The respondents are interested in being informed what there is to see and do in Alberta. They also know now that they have visited Alberta, that there is more to Alberta than most people realize, but they do not have the specifics because their trips (for the most part) were limited to Jasper, Lake Louise and Banff. Some did visit Edmonton and some did visit Calgary, but many of the attractions shown in the video are new to them, particularly attractions that are off the beaten path, such as Drumheller and Dinosaur Provincial Park.

"I would have liked to have known that Edmonton had the largest mall in the world. I would have visited it, but I didn't know."

2.5 Future travel plans

Overall, the attitude of respondents regarding visiting Alberta again in the future is quite positive. Motivations for visiting Alberta again:

- To show Alberta to others and share the experience with friends, partner or children (when they are old enough) who have not been there yet
- To explore and experience Alberta more extensively and visit the parts of Alberta they have not yet seen
- Security of having a nice holiday: one knows what to expect

The future travel intentions of the Mature Families group and the Young Families group seem to differ slightly. The Young Families group expresses higher levels of interest in visiting Alberta again in the future. The Mature Families group is a bit more hesitant in this respect. This can be explained by the fact that they are older and therefore have a shorter future in which to plan a return visit, which decreases the chances of them visiting Alberta again. The main reason for both groups *not* to visit Alberta again is the fact they want to see other countries first ('been there, done that').

3. CONCLUSIONS AND RECOMMENDATIONS

3.1 Conclusions

Awareness, familiarization and information gathering process

- Consumer awareness of Alberta as a vacation destination is low.
- In general consumers, do not consciously choose Alberta; they visit Alberta as a consequence of choosing Western Canada.
- Third parties such as family and friends, reports in travel programmes on television and general portraits (articles in magazines, books, etc.) are most important sources in making Canada and Alberta top-of-mind and triggering initial interest.
- The most important motivators for choosing Western Canada are the need for nature, wildlife and the need for rest and relaxation. Often, the desire to visit family and friends who live there is a secondary factor.
- Since Canada is not a very well known country, Dutch travellers familiarize themselves carefully for the trip and use multiple sources to gather information.
- Several sources are consulted for travel information: the internet, travel agencies, family and friends, television programmes, fairs ('vakantiebeurs'), travel books and the Canadian embassy.
- The internet and travel agencies are considered the most important sources of information. The internet provides very extensive information on a wide variety of subjects and is always available (allowing travellers to gather information whenever they want it). Travel agencies offer brochures, guides and personal advice.

Perception & experiences

- Since Alberta is not well known, its image is relatively blank. The image consumers have of Canada is often transferred to Alberta (Canada=Alberta).
- The image consumers have of Canada (=Alberta) *prior to* their visit is: rugged nature, beautiful scenery, wildlife, green space, national parks, mountains, lakes, peace and quiet, fresh air and cleanliness.
- The perception consumers have of Alberta *after* their visit exceeds their expectations: more immense, magnificent, enormous, rugged, mystic, peaceful, quiet, pure, healthy, clean, relaxed, natural and friendly, helpful people.
- The trip to Alberta is often combined with a visit to British Columbia or the US and is often limited to the Rocky Mountains and surroundings: Banff, Jasper, Lake Louise and sometimes Calgary and Edmonton.
- Specific and detailed knowledge of Alberta is limited. Most Dutch travellers discover while in Alberta that there is much more to see and do than they expected before embarking on their trip. Hence,

when tours/routes would not have been completely fixed, there would have been (some) room for a longer stay in Alberta. This would mostly be at the expense of BC, since the total travel time is often divided between the two provinces and the total travel time would normally not be exceeded.

- Overall, the attitude of respondents regarding visiting Alberta again in the future is quite positive. The intention to visit Alberta again is slightly higher in the Young Families group.

Video

- Overall, the video of Alberta is perceived as not representative of Alberta. The image of Alberta portrayed in the video does not fit the needs that most travellers expect Alberta to meet when they select it as a holiday destination (i.e. the need for nature and wildlife and the need for rest, relaxation and peace and quiet).
- The relative amount of attention given to the different aspects of Alberta is perceived as wrong: too much focus on cities, events and entertainment and activities such as rodeos and cowboys. Too little focus on nature, villages and rest and relaxation.
- However, the fact that the video shows the diversity that Alberta offers is seen as positive.

3.2 Recommendations

- If Travel Alberta decides to invest in the Dutch market, we recommend trying to reach the well informed consumer early in the decision process to make Western Canada and Alberta top-of-mind vacation destinations.
- The choice of Alberta as a vacation destination is a consequence of choosing Western Canada. Travellers rarely consciously choose Alberta. Hence, it is important to trigger the interest of Dutch consumers in Western Canada and then to draw them towards Alberta.
- To encourage travellers to opt for Alberta or spend more time in Alberta or to raise interest in a repeat visit, travellers need to be better informed regarding what there is to see and do in Alberta *before* they make their decisions, but they also need to be informed *during* their stay (e.g. based on local promotions.)
- The main motivator for choosing Alberta is The Rocky Mountains, which offer nature and wildlife and fulfils the need for rest and relaxation. Therefore, we recommend continuation of the focus on the Rocky Mountains. However, we also recommend focusing on informing consumers about the other things to see and do in Alberta:
 - Inform them about the variety of nature and activities Alberta has to offer, not only in the Rocky Mountains, but also in other parts of the province: hiking, wildlife viewing, caves to explore, climbing, hunting, cycling, biking, golfing, horseback

riding, hot springs, rodeos, working on guest ranches, rafting, kayaking, shopping in the world's largest shopping mall, dogsled tours and (cross-country) skiing.

- Inform them that Alberta *does* have culture and heritage (First Nations, aboriginal art, dinosaurs, historic sites)
- Inform them that Alberta is well suited for both winter and summer vacations.

3.3 Point of discussion

- Relatively speaking, the number and diversity of trips offered to Alberta is lower than the number and diversity of trips offered to British Columbia. A relatively low diversity in trips offered will translate into a relatively low diversity in the behaviour of visitors to Alberta. The influence that diversity has on interest in Alberta and on the appeal of Alberta as a vacation destination is a point for discussion .
 - Will a larger product offering increase demand?
 - Will a more diversified offering (different routes in Alberta) help inform consumers that Alberta offers variety and trigger interest in spending more time in Alberta (at the expense of British Columbia)?

Amsterdam, April 2008

Kimm Scholten
Dewy Heiser
Liesbeth Gerritsen

APPENDIX

Moderator's Guide for Consumer Focus Groups

This is a flexible guide line. The order and the formulation of the questions are dependent upon the respondents and the flow of the interview.

1. Introduction (15 minutes)

- Explanation research and role MARE;
- Introduction respondents;

2. Trips in general (10 minutes)

- How often do you go on a holiday; when; clarify
- How long do you usually go; clarify
- On what does the length of the trip depend; clarify
- How do you decide on a certain holiday destination; clarify
- Which factors (what & who) are of influence on this decision; clarify
- What does the trip need to offer you; clarify
- To what extent does this differ to other trips within and outside Europe; clarify

3. Orientation- and decision process Alberta (15 minutes)

- When did you first hear of Alberta; how did you hear of Alberta;
- On what moment did you first think of going to Alberta; clarify
- What was the cause for considering going to Alberta; clarify
- What made you decide to go to Alberta; clarify
- What were motivations to choose for Alberta (check: role family visit); clarify
- What aspects were of influence in choosing for Alberta; clarify
- What did you find important in your trip to Alberta; what desires and needs did you have; clarify
- To what did the trip had to suffice; clarify
- What were your expectations of Alberta; clarify
- How have you orientated for the trip to Alberta; how/where did you start; clarify
- Which 'steps' did you take; clarify
- To what extent did your 'method' differ from other trips; clarify
- To what extent did you reserve the bookings (accommodation, excursions, etcetera) for Alberta in advance; clarify

4. Sources of information (10 minutes)

- What sources of information did you consult (travel agency, Internet, TV, magazines, friends/family, etcetera); clarify
- On what moment did you consult these sources; to what extent had you already decided on going to Alberta on that moment; clarify
- What source did you use for what purpose (orientation, actual booking, etcetera); clarify
- What source of information did you find most important; clarify
- Check per source (focus on the Internet):

- What is its role;
- What kind of information did it offer you;

5. Discuss photos (10 minutes)

- Tell us about the photo you have brought along;
- What do these photos show/say about your trip; clarify
- What does this photo make representative of your trip in Alberta; clarify

6. Perception Canada & Alberta (20 minutes)

- Short check: What is your perception of Canada; clarify
- What is your perception of Alberta; clarify
- What words come to mind for describing Alberta; clarify
- How have you experienced Alberta; clarify
- What have you experienced as positive aspects of Alberta; and less positive aspects; clarify
- To what extent is Alberta different from what you expected; clarify
- Now you have been to Alberta, how would you describe what Alberta has to offer; clarify
- Personification: When you think of well-known Dutch people ...who especially will find Alberta an attractive holiday destination; clarify
- Who will not find Alberta an attractive holiday destination; clarify
- What kind of activities did you undertake in Alberta (actual vs sought); clarify
- How much time did you spend in Alberta; clarify
- What would be a reason for you to spend more time in Alberta; clarify
- How have you perceived the price – quality relation in Alberta; clarify
- Imagine it would not have been possible to go on a holiday to Alberta, what would then have been a good alternative; clarify
- Imagine you would now be assigned to take the ultimate photo in order to 'sell' Alberta, a photo which shows Alberta's strength, what would this photo look like; clarify

7. Jekyll and Hyde (20 minutes)

- The respondents are divided in 2 sub groups. One group consists of 'seller/promoters' of Alberta. They have to generate all positive aspects of Alberta. The other group, the competitors group, is assigned to generate all negative aspects of Alberta;
- The groups will then present their ideas to each other and will 'battle' each other with their best arguments;
- Further, both groups are asked to think of ways to resolve the negative aspects ('barriers') of Alberta;

8. Show video (15 minutes)

- Spontaneous reactions;

- How does the video come across;
- What do you find positive aspects; and less positive; clarify
- To what extent does this video show the important aspects/strengths of Alberta; clarify
- To what extent do you miss certain aspects; clarify

9. Future plans (5 minutes)

- Do you have the intention to visit Alberta again in the future? clarify
- What are reasons to visit Alberta again (check: family visit); clarify
- What are reasons to not visit Alberta again; clarify

10. Close

- Hand out incentives
- Thank & close