

## **AGTOURISM COMMUNICATION ASSESSMENT**

### **- Summary Qualitative Report –**

Presented to: Alberta Agriculture, Food & Rural Development  
Presented by: Criterion Research Corp.  
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## 1. BACKGROUND AND METHODOLOGY

Criterion Research Corp. was commissioned by Alberta Agriculture, Food and Rural Development to assess and report on potential consumer reaction to communications related to agricultural tourism activities. This qualitative research follows an initial round of focus groups conducted prior to a survey conducted to determine incidence and likelihood to participate in Agtourism activities.

The specific objectives of this qualitative research are to:

- Further the understanding of the stimuli that motivate, create appeal or reinforce an Alberta ag-based country experience, as well as the factors that deter or create barriers.
- Review specific brochures and materials that promote ag-based country experiences to determine their strengths and weaknesses for the purpose of specific revisions as well as their application to broad based communications in this sector.

Respondents were interviewed randomly from the general population and met specific recruitment specifications for the focus groups:

- Family respondents – have children at home between the ages of 5 and 14.
- Empty nesters – no children at home – with a combined household income of \$50,000 or more.
- Respondents aged 25-49 from dual income households, with no children.
- Respondents are very likely or somewhat likely to participate in a rural country experience.
- Respondents have traveled on a leisure trip 80+ kms from home one-way in the past two years.

Maureen McCaw conducted the focus groups. In total, four focus groups were conducted in two locations:

- Edmonton: 1 group family respondents, 1 group empty nesters and dual income households, with no children.
- Drumheller: 1 group family respondents, 1 group empty nesters and dual income household, with no children.

## **2. ANALYSIS OF FINDINGS**

This research furthers the learning achieved in the previous rounds of qualitative and quantitative research, helping to further illustrate the potential and the challenges in the area of developing and promoting ag-based country experiences.

In opinion research, focus groups are structured by open-ended discussions that serve as a powerful tool for developing insight and direction. The limited number of respondents and the restriction of recruiting requires this research be considered in a qualitative form of reference.

### **2.1 Alberta Ag-based Country Tourism - A New Genre**

The ag-based country experience represents a relatively new genre of tourism activity and experience for the traveling public in Alberta. As with any new, less familiar venture, it is necessary to provide clear explanations and definitions about the scope and range of activities that are being referenced. This will become less necessary as the “product” matures.

For example, when a potential traveler is reviewing materials for a warm weather ocean-side resort, they can formulate a mental picture and list of potential amenities and activities that are likely to be associated with the resort without being told. While they will look for information to find out what differentiates a particular resort, they do not need an explanation of what a resort is or the likely activities associated with it.

At this stage, potential ag-based country travelers cannot formulate accurate or consistent “pictures” of exactly what is incorporated in the ag-based country tourism choices before them. For example, when the materials reference a “farm vacation” it is difficult for readers to describe what is involved with a farm vacation experience. While the “ranch” references are somewhat more familiar, even there the understanding is limited and stereotypical - “I assume you will do things with horses and cows.”

Further, readers are not able to pre-suppose the activity level that is likely to be associated with most ag-based experiences. Again, without being told, potential travelers understand that at a resort they can spend their days in a range of activity levels of their choosing from lounging by the pool at one end to scuba diving and para-sailing at the other. Given the lack of familiarity with ag-based country experiences, travelers cannot accurately and consistently formulate an expectation about activity levels associated with them.

Therefore, it is important that at this point in its development the materials that support ag-based country tourism “take nothing for granted.” This is particularly the case given the extensive range and diversity of options that are included in this tourism sector, from farm, ranch to horticulture and the full spectrum of activity levels that are incorporated across the sector. While the materials promoting a more mature tourism sector can focus on their differentiating features and amenities alone, this research demonstrates the importance of clearly articulating the framework and scope of any ag-based country experience that is being promoted. Without a clear understanding of the actual experience or activity that is being described, confusion and misinterpretation is prevalent.

## **2.2 Overall Premise – Wholesomeness Must Become Exciting**

This research confirms previous findings in demonstrating that the common appeal of the ag-tourism based experiences is linked to the appeal of the values that are represented in these experiences. While tending to be somewhat nostalgic or “old-fashioned,” at core is a perception of “goodness and wholesomeness.” Central to the challenge of effectively positioning ag-tourism is ensuring that while the essential values of the experiences are highlighted and capitalized, the experiences are also featured as special, interesting, unique, exciting and perhaps most of all, fun.

Competition for traveler’s time and pocketbooks means there has to be an immediate sense that this experience is worth seeking out and doing, a strong “call to action.” Without this, the public is likely to view these experiences as “worthwhile because they represent a simpler time when our values were clearer” but they will be unlikely to be motivated to actually participate.

### **2.3 Challenges of “Value”**

The research has established the importance of ensuring that “wholesome” cannot be interpreted to be boring when positioning ag-tourism experiences. In a highly related point, it is important that these tourism opportunities move beyond the realm of “ordinary.”

Respondents indicate that while they would seek out and participate in these kinds of experiences if traveling outside the province, in reality they may not pursue them “in their own backyard” because “somehow close to home they seem to lose their glamour or specialness.” Further, there is a lack of a sense of urgency or “need to do it now” that is counterproductive, clearly demonstrating the need for marketing materials to have a strong “call to action.” To be effective, this call to action must be linked with a clear and concise understanding of “what I will get for what I pay – or what gives this value.”

In a related point, there is a tendency to relate ag-tourism type experiences with “where I grew up” or “where I visited my Grandma every summer.” While this is effective in -tourism experiences, it is counter-productive in encouraging visitation because these respondents cannot see why they should pay for something they either can or have experienced for free.

There is likely to be a benefit in developing a sense of pride in the fact that Alberta can offer these experiences and that tourists travel from around the world to “our back yard” to experience them. This fact adds glamour and appeal to the agtourism experiences and increases interest in visiting.

Further appeal will be developed once “word of mouth” personal referrals begin to grow and support decision-making. Personal referrals to family and friends by those who have had an agtourism experience should be strongly encouraged and motivated.

## **2.4 The Rural Urban Challenge**

This research demonstrates differences in rural and urban audiences when considering their likelihood to participate in agtourism experiences. Rural respondents demonstrate a stronger affinity for agtourism type experiences. They tend to express a more positive regard and are more vocal about their respect and “love” of the heritage related to these experiences. However, despite their affection, they do not see the need to pay for agtourism experiences. They express the perspective that they are “surrounded by these experiences everyday so why would I pay for them?” Urban dwellers that still have family or friends living in rural, ag-based country locations tend to express similar sentiments.

Further, there is a significant challenge positioning agtourism as a “vacation” when this audience perceives it is surrounded by these experiences on a day-to-day basis. “When you go on a vacation or an outing you want to do something different than you do everyday.”

### *2.4.1 Communications for the Urban and Rural Audiences*

The research demonstrates a different general response to the communications from the urban and rural audiences. The rural respondents tend to be more critical of communications they perceive to be idealized or patronizing of their way of life, while urban-based readers are more likely to romanticize agtourism experiences based on the material that is presented. Pragmatically, it may be necessary to be strategic about the audiences that will be reached in communications materials. Further, while it stands outside this research, it is expected that the overseas markets is another market that needs to be targeted with a specific message that create appeal and are unique to their needs.

## **2.5 A Broad Range of Appeals**

Vacations or outings are seldom taken alone. So when a family or a group is considering a destination, one of the pivotal questions is “Is there something here that will interest or meet the needs of all members of our travel group?” Communications needs to be very clear in framing what they may find of value or of interest in these types of experiences. Again, the requirement to do this is higher at the onset of marketing these experiences than it may be as the agtourism market matures. To use the analogy of the ocean-side resort again, a reader can easily picture the “fit” with various family members. For agtourism experiences, this assumption cannot be made.

In a related point, it is essential that the full range of activity levels be communicated. For example if a ranch vacation provides a range of options for activity level from passive (sitting on the porch) to highly active (participating in a cattle drive), it must be explicitly stated or erroneous assumptions are made. Further, it is important to delineate whether or not experiences require a certain set of skills. Consistently, respondents tended to eliminate themselves from activities if they felt “horsemanship” was required.

## **2.6 Destination-based versus part of the Asset Mix**

To create a sufficient level of interest, appeal to a broad based group and offer a sufficient variety of activity levels, it is apparent that encouraging operators to work in partnership will be to the advantage of all parties. On their own, it tends to be a response of “it doesn’t seem as if there is enough to do.” “It wouldn’t be worth it to do just one thing.” “There is not enough here for everyone in my family.”

When vacationing outside the province, respondents indicate that they seek out information about attractions and activities, and create a personalized slate of activities that build on one another. Given that Alberta based agtourism is just being introduced to the market, consumers are not yet thinking about approaching their trip planning in that same way. Therefore, it is important that as much as possible, communications support their travel planning and create synergies that strengthen overall appeal and likelihood to consider.

Recognizing that partnerships or alliances may take time to build, it is important that materials attempt to distinguish whether an offering is a stand-alone destination or is a shorter, “add-on” or ancillary product. While this challenge will be addressed when communications are clearer about the range of activities that is included, at this point, respondents find it difficult to determine if a product is intended to be a “20 minute or a two hour stop.” “Is this something I would do on the way or is that a day in and of itself?”

Additional clarity is essential to support the decision to consider undertaking the activity as well as to support good trip planning and ensure customer satisfaction with the experiences.

## **2.7 Overall Language Approach**

There are a number of overall considerations that apply across a broad spectrum of communications.

As has been discussed in other research reports, the term agtourism is not effective in communications or marketing materials. “Country” tourism is a possible alternative but it is noteworthy that urban-based respondents tend to talk about “getting out of the city” as opposed to “going to the country.”

There is more immediate appeal in a ranch versus farm experience. While both require clarification as to the range and level of activities and experiences they offer, the term farm tends to be associated with "hard-work and chores" while ranch is more romantically associated with the open range, the campfire, scenery and vistas.

When tourism brochures or communications are reviewed, the reader is asking the question “Where do I fit with this?” If materials are in any way unclear or confusing, or if a reader has to work to understand them, they are quickly dismissed.

Care will need to be taken with words such as tour and vacation. Tour tends to convey an organized, assembled group being shepherded along a pre-determined path of activities or destinations. Alberta travelers are fiercely independent and are strongly resistant to any intimation that they will not be “in control” of where they go and when.

Vacation implies a longer commitment of time and is usually associated with “going away.” If a tourism destination is being positioned as part of a day or weekend trip, the term vacation is not appropriate.

## **2.8 Informing and Educating Consumers**

Agtourism marketing materials are just being introduced to the Alberta market in a strategic plan. Therefore, at this point in time, it is common to have respondents say, “There is no information available about the range of activities that are available or when special events are scheduled.” However, it is also clear that they are not necessarily looking for information because they are not aware that they should be considering “their own back yard” as a destination. It will be important to make consumers aware that information is available and how to find it.

It will also be important to help consumers with the knowledge of how to plan their trip; what is there, what activities are included, who they are suitable for, what activity levels are available, as well as other “add-on” attractions that may enhance their experiences.

## **2.9 Brochures**

### *2.9.1 General Considerations*

#### **PHOTOGRAPHS**

Photographs are critically important in conveying a sense of what the experience will be like both on the front cover and inside the brochure. Every care should be taken that the photos set the tone and send the right message about the experience.

#### **FRONT COVER**

The first job of a brochure is to encourage someone to pick it up or open it up and then to at least glance at it or read it. The front cover is key to this success. It must convey clearly and completely what’s inside, representing the fullest range of experiences possible.

#### **INSIDE COVER**

A block of text dense material tends to be dismissed. Readers look at ways to get through the material quickly and still find the thread of the message while asking themselves “Do I want to read further?” They look for headlines, bolded text, bullets or short passages to accomplish this.

It is important that whatever the cover or inside cover imply or convey, it is fulfilled or delivered on inside the detailed brochure.

#### **INSIDE**

If readers do not immediately understand the material or have to work too hard, they will abandon it. Essentially, readers are looking for planning information, what to do, how to do it and when.

Information such as age appropriateness, cost, accommodations, maps and distances is considered helpful.

Including a calendar of events creates a sense of urgency and a reason to “do it now.”

## AGE DIFFERENCES

While qualitative in nature, this research indicates there are age differences in the type of information that is preferable. Older people plan self-guided tours in advance, may travel at a more leisurely pace, like specific and detailed information and welcome a quantity of information.

Younger people tend to plan more on the spur of the moment, don't have as much time for intensive planning and find a lot of material or a lot of detail overwhelming and "too much

### *2.9.2 Specific Materials: "Overall" Description*

The "overall" description demonstrates the importance of achieving effective "leveling" meaning providing an opportunity for the reader to create their own trip with as many or as few options as they want. Effective choice sets that provide a range of complexities and activity levels are key to success.

As it stands, the current description is referred to as "frenzied," with respondents feeling they are "bombarded" with information. It is not clear to respondents that the material represents a slate from which as few or as many things can be chosen as is appropriate.

Compounding the challenge is that the materials do not convey a sense of the full range of experiences and so respondents read it and say "there is nothing here for me."

Further, the term "self-guided" is not intuitively understood.

### *2.9.3 Food/Education Modules*

As with the overall descriptor, each of the individual pieces must do an effective job of leveling, proving the reader with a sense of choice and individuality.

This research reinforces previous learning that indicates that the opportunity to eat and enjoy food reinforces a positive tourism experience. However, respondents are not able to process a description that is entirely anchored as a food based experience. It was difficult for them to understand what is being described "Are these things all under one roof is this a big market of some kind?"

Further, because the description is difficult for the respondents to understand or grasp, there is a tendency to perceive that it oversells or encompasses experiences where “you are expected to buy something every time you turn around.” “It is going to be sell, sell, sell.”

As with food-based experiences, educational components are seen to be effective as part of an experience, rather than as the primary motivator. “I guess when I think about it I like to learn things as part of my tourism experiences but I don’t look for stuff that says education.” Learning is seen to be most effective when it is incorporated into the experience and can still be considered “part of the fun.”

#### *2.9.4 Cowboy Trail*

Respondents describe the cover of the brochure as “horse-ish” and it does not arouse much enthusiasm among those who are not aware of what is inside. The term trail on the cover creates confusion, and participants do not readily see how they "fit" into the experience.

The overview of the experience is not very effective in eliminating the confusion about how to utilize the brochure and what information the brochure will provide.

Participants indicate they like the map, the full state of opportunities and the choices provided inside the brochure. The brochure is perceived as a good trip-planning tool, although its use needs to be more intuitive. The good headings create a sense of fullness and respondents think they could find something to do.

However, they indicate that the organization of the brochure is not clear and that it is difficult to use. They also indicate that finding accommodations using the legends in the brochure is challenging.

#### *2.9.5 Farm and Ranch Vacations*

The title of the brochure is unappealing and respondents are unlikely to choose it from a brochure rack. In addition, the prominence of 2003 raises questions.

The overall description inside the brochure is perceived as misleading, as respondents could not find the referenced experiences inside the brochure.

The pictures inside the brochure do not support the fullness of the experience, as the brochure does not visually reference all activities and seasons - the brochure mentions winter activities in the text but does not include photos of these activities. Having to look from description to legend to map also poses a minor challenge.

### *2.9.6 Ryder Lake Ramble (BC based, included for learning)*

The sense of overall simplicity of the brochure appeals to the respondents. However, the experience being a single day event is not readily understood from the brochure cover.

Even on detailed examination, respondents remain confused about having to pay for the experience if they are only driving by. The brochure is also unclear about the addresses and timings "can everything be done in one day" "can we choose the activities to take part in." Respondents also indicate that the map needs a scale and that it is unclear whether this is drive route.

### *2.9.7 Fruit Loop (US based, included for learning)*

The overview in the brochure provides a context, a good description and a preview of what is inside. The brochure provides clear references and has good wording. Respondents like the inclusion of prices, map and accommodation details in the brochure.

Even though the experience is fruit based, respondents feel that it includes more experiences and have the sense of not having to pay for everything. The brochure may appeal more to older people, as younger people might feel overwhelmed.

### **3. CONCLUSIONS**

Communications should clearly articulate the framework and scope of the experiences to aid travelers in formulating accurate and consistent pictures of what is involved in agtourism activities and to minimize confusion and misinterpretation.

Creating excitement around agtourism experiences is important in driving travelers to take active steps in participating in the activities. Communications should convey that the experiences move outside ordinariness, that it would be sought by others, and that it would create a value proposition, even for those who have previous experiences through family connections. Pride in Alberta is also a trigger for success.

#### **Communications for the Urban and Rural Audiences**

Rural Albertans tend to show more affinity to the experiences than those from urban areas. Communications should build on the affinity of those from rural areas by demonstrating that these experiences are different from what they experience on a day-to-day basis. For urban travelers, improving the perceived “do-ability” of the activities might help in driving positive action steps for incorporating the activities into their vacation habits.

#### **Communicating Broad Range of Appeal**

Communication of agtourism activities should be framed to illustrate that these experiences provide a good choice of activities from a gamut of possibilities. Communications should also provide detailed information regarding the level of physical activity and skill needed to participate in the activity.

In addition, encouraging operators to work in partnership will help in making the experience appealing to a broad based group, whereby alleviating fears of not having enough variety for everyone in the family or travel group.

### **Overall Language Approach**

Marketing language used in the communication should convey the spectrum of possibilities and choices offered by the experiences, while ensuring that the communication material is easy for travelers to understand and readily show where they fit into the picture. The term agtourism is not effective in communications. The term "country" works better than agtourism though it does not exactly match with respondents' reference - "getting out of the city". The term "ranch" has more positive connotations than "farm". The term "tour" evokes a feeling of being pre-determined and restrictive and "vacation" conveys longer commitment of time.

### **Support for Travel Planning**

Supporting travel planning by providing detailed information regarding the range of activities available, level of physical activity involved, and time required to participate in the activities is important. Steps should also be taken to educate travelers about sources they can utilize to obtain additional information about agtourism.

### **Brochures**

Photos and descriptions included in the brochures are very important and should be thought of and utilized as valuable real estate. The brochure should include a full array of experiences, clear and concise material conveying excitement and urgency, and practical information for individual planning.

### "Overall" Description of Specific Materials

The materials should illustrate the full range of experiences and choices available to the traveler. However, effective leveling of the materials that will allow consumers to create their own trip is essential. In addition, key pieces of information such as travelers having the choice to select the activities they want, and being "self-guided" requires clearer explanations.

### Education / Food Modules

Education and food experiences are effective as elements that create a broader appeal. However, food experiences are perceived as overly emphasizing selling. Respondents indicate that learning is fun as part of an experience rather than a lecture.

### Reaction to Specific Brochures

Respondents choose Fruit Loop as the preferred brochure as it portrays fullness of opportunity through its pictures, provides detailed information, and facilitates understanding and use of the brochure as a planning tool.

Cowboy Trail, and Farm & Ranch Vacations brochures need to broaden their appeal by portraying the full range of experiences that are included within the brochure. The cover of these brochures should arouse enthusiasm and clearly communicate the contents of the brochure. In addition, the Cowboy Trail brochure should be made easier to use by improving its organization and reducing the need for transference of information while using the brochure.

Ryder Lake Ramble brochure illustrates travelers' willingness to accept something unpretentious.