infact Research and Consulting Inc.

Event-Based Market Potential for Agtourism

Alberta Agriculture, Food and Rural Development

March 31, 2004

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Report

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Executive Summary

INTRODUCTION

This study was an investigation of the cross-marketing potential offered by existing agtourism events. It was aimed at better understanding the opportunities provided by marketing to people who attend three categories of large-attendance generating events: rodeos, fairs and destination farmers' markets. The information sought included their socio-demographic and geographic profiles, their awareness, impressions, past participation and needs relating to a trip which involves ag experiences. The information was intended for use in product development, strategic partnership formation and the preparation of sound, focused, marketing strategies to stimulate rural development and the diversification of farmer/rancher revenue sources.

Study results are based on 1,656 intercept interviews conducted at eleven ag events held in Alberta between August 2003 and March 2004. 41% of the interviews were conducted at fairs, 38% at rodeos, and 21% at farmers' markets.

Four ag experience categories were defined by factor analyzing a 2003 market research study conducted for Alberta Agriculture Food and Rural Development (AAFRD) on interest in 39 separate agtourism experiences. The experience categories which emerged were:

- **Horse Riding On A Ranch** in the foothills or on the prairie; being instructed on horsemanship at a ranch riding camp; practicing reining and roping skills; participating in a cattle drive and learning how to sort and pen cattle; or experiencing the cowboy lifestyle while riding in a covered wagon, eating BBQ steaks and chuck wagon biscuits.
- **Country Shopping, Food And Entertainment** such as at a country fair which includes things such as baking, old time contests and country and western entertainment; shopping at a farmers market; tea in a heritage farmhouse; visiting local shops and learning about the art of country crafts and western trades like wheat weaving or blacksmithing; or U-pick fruits at a market garden.
- **Having Fun Learning About The Country** by taking a farm tour to better understand our crops, farm equipment, livestock and seasonal farm activities; tasting fresh honey and learning the ins and outs of honey production and beekeeping; touring processing facilities to learn how cookies, sugar, pea butter and sunflower seeds are made; or discovering the inner workings of a fruit or vegetable greenhouse operation.
- **Attending Country Style Events**, such as a large-scale farm animal and equipment exhibition; a western livestock auction; a horse breed show and sale; a rodeo; a heritage farm festival with threshing machines and tractor pulls; or a demonstration of stock dogs herding sheep.

The survey involved the use of conjoint analysis to investigate preferences for eleven components of an agtourism trip, judged in a manner that simulates real world choices. It also included use of a pricing algorithm to identify expected costs and a maximum price threshold within a predetermined price range.

ATTENDEE PROFILES

As a tourism product, attendance at an event can only be regarded as agtourism if the person has travelled at least 80km away from home. By this definition one in four event attendees was a tourist (27%, with 21% from Alberta). Although it is unlikely that packages that combine attendance at the event with other agtourism experiences would be successful among the majority (i.e., local and regional attendees), the finding does not limit attendee potential to take separate trips that include agtourism experiences that do fit the definition.

On the whole, individual ag events drew most of their visitors from their nearest large population centre. However, over all the events surveyed, the audience broke down into 36% from the major centres, Calgary and Edmonton, 19% from large and small urban areas including towns, and 31% from rural locations including smaller centres, farms and ranches. In comparison to the total provincial population, there was a disproportionately high representation of people from rural areas, and underrepresentation from the two major centres at ag events (Alberta 2001 distribution: 46% Edmonton/Calgary, 35% other urban, 19% rural). The vast majority (79%) of attendees also had friends or relatives in rural areas who they could visit to enjoy experiences like the ones discussed (47% located in Alberta, 7% elsewhere and 26% both in Alberta and elsewhere).

Ag event attendees were older than the general population. Ag events were disproportionately likely to attract middle aged adults (45-64 years, 41% vs. 30% in the population), and less likely to bring in both the youngest (18-24 years, 9% vs. 14%) and oldest age cohorts (65+ years, 8% vs. 14%). This translated into fewer single person households (11% vs. 23%) and more couples (36% vs. 28%), primarily older empty nesters. Event attendees average household income in 2003 was $75,000, higher than the average provincial income.

Key differences in attendee profiles for each type of event were as follows:

- **Rodeo** visitors included the highest proportion of Alberta tourists (30% of attendees) and national/international tourists (8%). They were particularly likely to be farmers/ranchers (29%) and to have family or friends they could visit in rural areas (86%). They were less likely than average to come from Edmonton (8%). Rodeo visitors included a higher than average proportion of 18-24 year olds (16%), people living in young adult households (27%) and especially bachelor households (8%).
- **Fair** goers closely resembled the total population of event attendees except in: being more likely than average to have links to rural friends and relatives (81%); having a greater proportion of preschool families (where the youngest child was under 6 years old – 23%); and a lower household income ($72,000 on average).
- **Farmers' Market** attendees were primarily local visitors from within 40 km of the event (73%, with 12% being tourists) and less likely to have informal rural connections (65%). They were more often metro Edmonton and Calgary residents (63%), older (60% 45+) empty nesters (33%) and more affluent than average ($81,000).

AWARENESS, IMPRESSIONS OF, AND PARTICIPATION IN, THE FOUR AG EXPERIENCES

The key area of interest for marketing purposes was whether attendees at ag events would be interested in other agtourism opportunities. In Edmonton and Calgary, separate surveys were conducted at combined events, one a rodeo, one a fair. Cross-event attendance intentions proved higher for those attending the rodeo (1/2 to 3/5) than the fair (1/4 to 1/3), suggesting that such interest exists, but varies with the needs of the visitors. This was confirmed and explored further in a number of ways. All respondents were asked: to rate their awareness and impressions of the four types of ag experiences; whether they had ever participated in them: where that had occurred: and how often they had done so in the previous 12 months. What they knew best, what they regarded most favourably and what they had participated in, all varied with the type of event they were attending.

On the whole, ag event attendees were most knowledgeable about Country Shopping, Food & Entertainment (mean 3.90 out of 5) and Country Style Events (3.87).[1] They knew somewhat less about Horse Riding on a Ranch (3.67, with 20% indicating they knew nothing about these types of activities, even if they had heard of them). Least well known was Fun Learning About the Country at 3.36, with only 21% (compared to about 1/3 for the others) being very knowledgeable.

Exactly the same pattern was found regarding the impressions attendees had: attitudes were most favourable for Country Shopping, Food & Entertainment (5.82 out of 7) and Country Style Events (5.75), less so for Horse Riding on a Ranch (5.46) and Fun Learning About the Country (5.33, with a large percentage of neutral or slightly negative views).[2] Further analysis showed that the more a person knew about an experience category, the more favourable their views of it tended to be, suggesting that informed awareness may be critical to stimulating positive perceptions. Those who had participated in Horse Riding on a Ranch or Country Style Events in the USA were particularly favourable about the experiences.

Participation levels were highest for Country Shopping, Food & Entertainment (79% had done this in the past) and Country Style Events (70%). However, there was a quite significant drop to the next most popular, Horse Riding on a Ranch (48%), followed by Fun Learning About the Country (46%). About nine in ten of the people who had participated, had done so in Alberta and the majority, between 1/2 and 2/3, had also participated outside the province – elsewhere in Canada, in the USA or another country.

Participation in the four ag experience categories was most likely to have taken place in Alberta in the past year for Country Shopping, Food & Entertainment (77% of those who had ever participated, or 57% of all event attendees), Country Style Events (75%/49%) and Fun Learning About the Country (68%/28%), but less so for Horse Riding on a Ranch (53%/22%). Nevertheless, riders who did go on this type of trip were quite devoted and appear to have taken many more trips on average than those participating in the other experiences (14 vs. 5-7 in Alberta).

These overall results hide diverse responses from attendees at the different types of ag events:

- **Rodeo** fans showed above average awareness of Country Style Events and Horse Riding on a Ranch (4.13 and 4.07 respectively), and had more positive impressions of ranch-based horse riding (5.80). Rodeo attendees were more likely to have ever participated in Horse Riding on a Ranch (57%), to have done so in the USA and to have done so more often in the past 12 months (average 20 ranch-based horse riding trips in Alberta, 11 elsewhere).

  They were also more likely to be aware of their own category, Country Style Events (4.13), to have a more favourable attitude to Country Style Events (6.07) and to have participated in them in the

1. Awareness: 5 = Know a lot about these experiences, 4 = Know something, 3 = Know a little, 2 = Have heard of but know nothing about them, 1 = Have never heard of them.
2. Impression: 7 = Extremely favourable, 6 = Very favourable, 5 = Somewhat favourable, 4 = Neither favourable nor unfavourable, 3 = Somewhat unfavourable, 2 = Very unfavourable and 1 = Extremely unfavourable.

USA. Frequency of participation in Alberta in the past 12 months was also higher than average (12 Country Style Events in Alberta, 10 elsewhere).

- **Fair** attendees were somewhat more positive than others in their views of Fun Learning About the Country (5.50) but were average on all other measures and experiences. Part of the reason may be that trade or business-oriented fairs fell into the Country Style Events category, while more relaxed events fell into the Country Shopping, Food & Entertainment category, producing opposing and neutralizing trends.
- **Farmers' Market** shoppers showed higher than average awareness only of their own category, Country Shopping, Food & Entertainment (4.05), and below average awareness and less favourable than average views of the other experience categories. Participation followed the same pattern (88% had participated in Country Shopping, Food & Entertainment, but fewer had participated in the other categories). However, they were less likely to participate in Alberta and more likely to do so outside, especially in other countries. This more cosmopolitan behaviour was echoed in their taking part in Learning About the Country in other countries to a greater degree as well.

Pricing

The question which arises is whether ag event attendees would be willing to pay for an agtourism experience, since so many of them either live the life or have links to people doing so. Respondents were asked what the chances were that they would take a pleasure trip in Alberta that included ag experiences at price levels ranging from $50 to $200 per person per day.

Overall, event attendees expected to pay an average of $113 per person per day, travelling with an average party of 2.3 people, or just over $250 per day. The most frequently mentioned prices were between $50 and $124 per person (52%), with 13% mentioning a lower price and 32% a higher one. Based on their responses, it is anticipated that 64% would take an ag trip at their expected price (assuming a perfect world, with full knowledge of the availability of these types of ag experiences).

It was also found that the higher the price, the lower the likely participation rate would be: 96% at $50 per person per day, 85% at $100, 71% at $150 and 51% at $200. If only those most likely to take such a trip were considered, i.e., people with a 90% chance or higher of doing so, the conservative estimate of market size at each price level was: 25% at $50, 17% at $100, 10% at $150 and 6% at $200.

Further questioning established a maximum price threshold for each respondent within the range examined. The average rose to $150 per person per day, but the proportion likely to take the trip dropped to 39%. In other words, ag event attendees have a comfort zone within which they would be willing to pay for agtourism experiences, but their interest drops as the price rises.

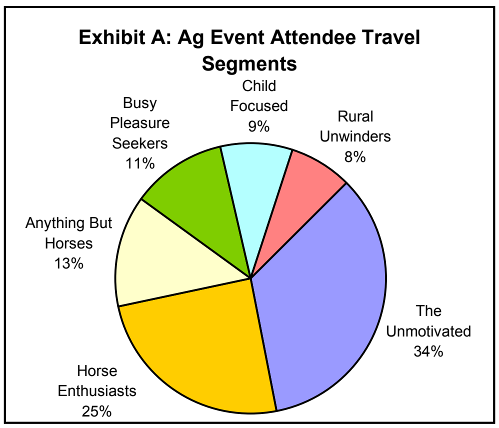
Noteworthy findings were that rural participants or those with informal rural links were not averse to paying for an agtourism trip. Furthermore, people attending rodeos – many of whom were rural – had a higher interest in participating and in doing so at an above average price, as were people in the highest income category ($120,000+).

PRODUCTS AND PACKAGING

Accounting for 32% of trip decision making is the type of experience offered. The order of preference was for Country Shopping, Food & Entertainment, then Country Style Events, Fun Learning About the Country and finally, Horse Riding on a Ranch. Highest interest in Country Shopping, Food & Entertainment was found among farmers' market attendees, in Country Style Events among rodeo and fair goers, in Fun Learning About the Country among fair goers and in Horse Riding on a Ranch among rodeo fans.

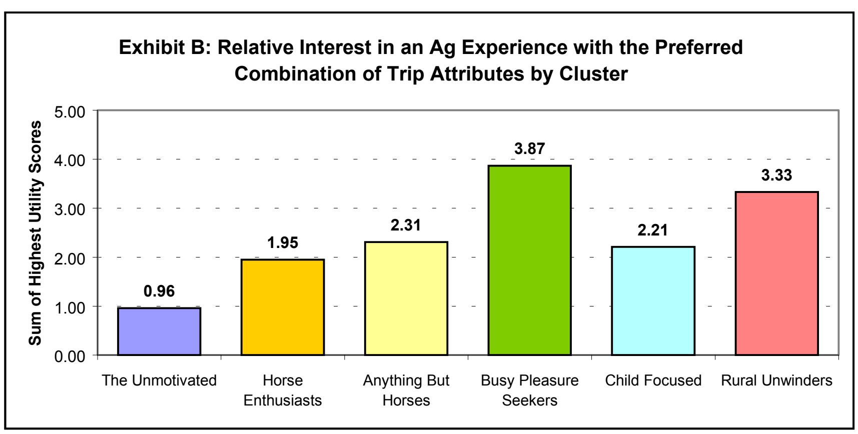
The second most important attribute, comprising 20% of the decision, was trip length and type of accommodation. Preference was expressed first for a day trip, followed by a weekend trip staying at country style accommodation, a weekend at a hotel/motel and then a campground.

Other attributes each accounted for 6% - 8% of importance and suggested overall preference for a trip suitable for children; for shorter travel times from home (1 - 3 hours); for activities suitable for one's normal travel companions rather than for visiting friends and relatives; for enjoying a variety of different experiences; for going to a single location and enjoying things to do nearby; for keeping busy and on the go; and for making arrangements while on the trip.



While these were the overall preferences, different groups of ag event attendees showed different combinations of preferences. Six groups with distinctly different product needs were identified through cluster analysis. They are shown in Exhibit A and their interest in taking a trip with their preferred trip attributes is shown in Exhibit B. The clusters had the following characteristics:

- **Horse Enthusiasts** (25% of ag event attendees) were younger than average and interested in ranch-based horse riding while staying in country-style accommodation. Due to their single minded focus, longer travel time from home was not a concern and neither was a higher price level (an expected average price of $127 per person per day and a maximum price of $160). Country Shopping, Food & Entertainment was of relatively low interest to them and they were less likely to be found at farmers' markets (13%). 50% were found at rodeos.
- **Anything But Horses** (13%) cluster members had in common low awareness, interest and participation in Horse Riding on a Ranch and preferred any ag trip experience that did not include horse riding – most particularly Country Shopping, Food & Entertainment. Complementary trip characteristics for this group were: making



arrangements in advance, travelling around a region while staying at campgrounds, and enjoying a limited number of major experiences. They had above average concentration in the 45-64 years age groups and tended not to have children living at home. They were most frequently found at fairs (51%) and less likely than average to be at rodeos (22%).

- **Busy Pleasure Seekers** (11%) tended to be non-rural residents – especially from Edmonton – with no informal rural connections, aged 45+, and overrepresented among older singles and older groups. The primary interest of this enthusiastic group was in the Country Shopping, Food & Entertainment experience category. They were far less interested than average in Horse Riding on a Ranch, or likely to attend a rodeo. Busy Pleasure Seekers' preferences for a trip like this included: travelling with their normal companions on a day trip, or a weekend trip staying at a central location in accommodation other than a campground. They preferred to keep busy and on the go, to make travel arrangements while they were away and to enjoy a variety of activities. 40% were found at farmers' markets and they were underrepresented at rodeos (25%).
- The **Child Focused** cluster (9%) included a high proportion of 25-44 year old parents of preschoolers and young children (especially preschoolers). They expected that an ag trip would cost less than other clusters ($89 per person per day) and the maximum price they would consider paying was also lower ($137). However, total per day expenses would be higher, since they travelled in larger parties which could include visiting friends and relatives. The Child Focused cluster did not single out any ag experiences as having particular appeal but did signal low preference for accommodation in a hotel or motel. 50% of cluster members were found at fairs.
- **Rural Unwinders** (8%) were especially interested in attending Country Style Events. The impression given by this group was that they saw events as an opportunity to take a break from day to day farm/rural life – hence a low interest in Learning About the Country or using country-style accommodation. They preferred to travel with their usual adult companions, take a day trip or camp in a central location and enjoy local activities, and were not averse to destinations that are further afield. Like the Horse Enthusiasts, half the Rural Unwinders (48%) were found at rodeos.
- **The Unmotivated** (34%) were not strongly associated with any particular type of event but found at all events. They had no distinguishing ag experience preferences or geographic or demographic characteristics. However, the group did express a distinctive combination of trip needs which included: an adult-oriented trip, to be taken to entertain visiting friends or relatives, travelling around in a region, a short distance from home, that would involve only one or two major activities, while staying in a campground. The Unmotivated had a lower than average interest in taking an ag trip overall, and at their expected price.

Cross-promotional marketing activities should take into account, and address, the interests and needs outlined above if they are to be effective. It is likely that the best opportunities will come from selling to participants in another activity within the same experience category. While members of all clusters may be found at all types of events, they do tend to be more prevalent at one type rather than others (and there can also be differences between specific events within the general event type), so careful targeting where the greatest number are likely to be found is needed.

Messages, promotional materials, and trip "packages" (combinations of attributes) targeted to members of the different clusters should be clearly separated and demographically/geographically relevant to maximize their impact. Discount packaging may be most useful in stimulating interest in the clusters with low interest, no specific ag experience preferences, or low price elasticity.

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Introduction

Infact Research and Consulting Inc. is pleased to present the findings from a survey on the market potential for agtourism among people participating in selected high attendance agtourism experiences – destination farmer's markets, fairs and rodeos.

Background

In 2002, Alberta Agriculture, Food and Rural Development began a three year initiative to investigate the potential of agtourism as an opportunity for farmers and ranchers to diversify their revenue sources and to stimulate rural development.

Alberta's agtourism product has been defined in a number of ways:

- Four categories – food, farm, ranch, and garden.
- Within each of these categories there may be:
- Attractions (e.g., active or heritage farm tours/visits, Hutterite colony, plant tours, barn dances, entertainment farms, corn mazes);
- Retail services (e.g., market gardens, u-picks, farmer's markets, saddleries, ag/western theme artisan studios, nursery/herbal/floral show gardens);
- Accommodation services (e.g., country vacations, guest ranches);
- Food & beverage services (e.g., on farm or grain elevator teahouse, corporate picnics, western barbeques, chuckwagon dinners); and
- Events (e.g., cattle drives, threshing festivals, cowboy poetry, country fairs, food festivals, livestock shows/auctions, rodeos, exhibitions).
- Experiences (e.g., shop at a farmers market; attend a country fair with baking, old time contests, country & western entertainment; watch a rodeo or go behind the scenes and meet some riders; etc.)

Agtourism strategies are in place in several countries and Canadian provinces. Existing information on the Canadian and US market generally covers participation rates, interest and demographic profiles. More in-depth information on the Alberta market (qualitative and quantitative) has been obtained over the past two years, including interest and participation in, and perceptions of, agtourism experiences. The results of these studies have indicated that while agtourism can have very broad appeal, this is not a well defined or well understood tourism sector.

As a result, there is much that needs to be done to raise the profile of the sector in the market, as well as among potential suppliers, many of whom likely do not see themselves as part of the tourism industry.

Purpose And Objectives

The purpose of the study was to provide information that will help Alberta Agriculture, Food and Rural Development assist the industry with product development, the formation of strategic partnerships and preparation of sound, focused, marketing strategies.

Of particular interest was the identification of cross-marketing potential for agtourism experiences, the specification of desirable "product" or "package" components,[1] and a description of how these link to market segments within the broad audiences attracted to selected types of ag events: fairs, rodeos and destination farmer's markets.

The objectives and requirements of the study were therefore to:

1. Assess the existing awareness level and perceived image or relative attractiveness of Alberta-based agtourism products within each of the selected ag experiences.
2. Determine existing participation rates in agtourism experiences.
3. Determine potential market interest in agtourism experiences.
4. Identify the key product attributes for the experiences.
5. Identify the impact of pricing on the demand for ag experiences.
6. Discuss the cross-promotion potential for agtourism experiences among attendees at each type of event.
7. Assess the degree to which packaging of agtourism experiences would present market driven opportunities.
8. Discuss the positioning required to capitalize on expressed market needs.

The information was required separately for Alberta attendees and non-residents, with emphasis on the resident market.

1. The combination of features being offered to the consumer. This does not necessarily mean a set price or pre-designated combination of offers (ag experience, accommodation, transportation, food and beverages, etc.) It may simply be a way of showcasing together the things that will appeal to the target consumer when marketing and cross-selling, both before and during the ag trip.

Methodology

Target Market And Survey Approach

Due to the potential ease of marketing to, and quickly reaching a large number of individuals already participating in agtourism (whether consciously aware of the fact or not), the population of attendees at major agtourism events was the target market identified for this survey.

The survey used an on-site intercept approach, with interviews conducted at 11 separate events held throughout Alberta over the period August/2003 to March/2004.

Sample Size And Distribution

Three broad categories of ag-events were initially defined: country fairs, rodeos and destination farmers' markets. Eight events were selected to represent the categories. A sample of 1,700 completed interviews was targeted and 1,656 were actually completed. The targetted and achieved distributions are shown in Table 1.

Table 1: Sample Distribution by Event – Actual and Targetted

	Total	Major Combined Events	Fairs	Rodeos	Farmers' Markets
St. Albert: Farmer's Market, Aug-Sept/03	169 (170)				169 (170)
Millarville: Millarville Farmer's Market, Aug-Sept/03	173 (170)				173 (170)
Ukrainian Cultural Heritage Village: Harvest Festival, Sept 15/03	100 (170)		100 (170)		
Cochrane: Lion's Day Rodeo, Aug 30-Sept 1/03	170 (170)			170 (170)	
Red Deer: FCA Finals, Oct 10-12/03	173 (170)			173 (170)	
Bon Accord: Haunted Pumpkin Festival	75 (0)		75 (0)		
Edmonton: Canadian Finals Rodeo and Farmfair, Nov 5-9/03	352 (340)	352 (340)			
Lethbridge: Ag Expo and North American Seed Fair, Mar 3-6/04	170 (170)		170 (170)		
Calgary: Roughstock Rodeo and Aggie Days, Mar 19-23/04	274 (340)	274 (340)			
Total Surveyed (Targetted)	**1,656 (1,700)**	**626 (680)**	**345 (340)**	**343 (340)**	**342 (340)**

The shortfall in the number of interviews completed was primarily due to problems at the last event in Calgary, particularly at the rodeo. In fact, all rodeos presented different issues to be dealt with on site – from repeat attendance at different performances for the smaller rodeos, a narrow window of time in which to conduct interviews and unexpected administrative hurdles, to visitor inebriation. Outdoor events were subject to the vagaries of the weather. The one-day Harvest Festival was held on a cold and rainy day which resulted both in low attendance and a disinclination to sit out in the cold for an interview. As a result, the quota had to be completed at a different event (Haunted Pumpkin Festival). Contact rates at the various events are shown in Appendix II.

Once the attendee profiles for each event were reviewed, it was decided to combine them somewhat differently than originally planned for the analysis:

- In total, 631 interviews were conducted at four rodeos (288 at the combined urban events in Edmonton and Calgary, 343 at stand alone rodeos in Cochrane and Red Deer).
- 683 interviews were conducted at five fairs (508 at large urban fairs including the combined events in Edmonton and Calgary and the Lethbridge event, and 175 at the country fairs near Edmonton.
- 342 interviews were completed at two destination farmers' markets, in St. Albert and Millarville.

Quotas were set at each event for gender and origin. The target gender split was 50% male, 50% female, but could be as high as 60% at any event to accommodate a prevalence of one or other sex. The achieved sample was split 51% female, 49% male. An origin target was simply set to ensure that no more than 15% of the sample at each event would be from out of province (non-residents). The obtained distribution was 94% resident, 6% non-resident.

Sample Reliability And Validity

At the 95% level of confidence, the maximum sample margin of error for a random sample of 1,656 is ±2.5%. This means that if the survey were to be repeated 20 times, we would expect to see the results within 2.5% of those measured in this sample on 19 of those occasions. The maximum margin of sample error associated with the event sub-samples is shown in Table 2.

The total sample represents the events surveyed, in the proportions in which interviews were conducted, that is, 38% at rodeos, 41% at fairs and 21% at farmers' markets. This distribution may or may not be representative of all ag event attendees. The total line is therefore best used as a basis for comparison against various sample sub-groups, rather than as a description of ag event attendee market profiles. However, within each of the sub-groups (e.g., the three major event types), the results may be regarded as profiling that group.

Table 2: Maximum Margin of Error of Event and Event Type Sample Bases at the 95% Level of Confidence (i.e., for a response value of 50%)

Event	Margin of Error		
631 interviews at RODEOS:	±4.0%		
343 at stand-alone rodeos		±5.4%	
288 at large urban rodeos		±5.9%	
- ±170 CFR, FCA Finals, Lion's Rodeo			±7.7%
- 117 Roughstock Rodeo			±9.2%
683 interviews at FAIRS:	±3.8%		
508 at large urban fairs		±4.4%	
- 181 Farmfair			±7.4%
- 170 Ag Expo & North American Seed Fair			±7.7%
- 157 Aggie Days			±8.0%
175 at country fairs		±7.6%	
- 100 Harvest Fair			±10.0%
- 75 Haunted Pumpkin Festival			±11.5%
342 interviews at FARMERS' MARKETS:	±5.4%		
- ±170 St. Albert, Millarville Farmers' Market			±7.7%
352 at CFR/Farmfair	±5.3%		
274 at Roughstock/Aggie Days	±6.0%		
Total sample	**±2.5%**		

Questionnaire Construction And Survey Administration

This survey employed a number of fairly sophisticated techniques to generate the required information:

- From previous AAFRD research into interest in 39 different ag experiences, it was observed that there appeared to be links between some of the experiences.[2] However, with one exception (an interest in anything related to horses), these commonalities were not clearly defined. Rather than deal with questionnaire length constraints by addressing only a limited number of individual ag experiences that generated high overall levels of interest, Infact reanalysed the data using the statistical technique of factor analysis. Four categories of ag experiences that were thematically interpretable were defined, based on items within each group being rated similarly by respondents. In other words, a respondent who showed a strong level of preference for a particular experience also tended to show a similarly strong level of preference for the other experiences in the group; another respondent might see the same experiences as being of little interest – the key was that the

2. Criterion Research Corp for Alberta Agriculture, Food and Rural Development. *Ag Tourism Market Potential Assessment: Quantitative Report*, July 2003

items were rated consistently by individual respondents, not that they were highly preferred or not preferred. The four ag experience categories became the focus of investigation in the present survey. The results of the factor analysis and the attitudinal and demographic profiles associated with each of the four experience categories are summarized in Appendix I.

- To define the desired tourism "package", full profile conjoint analysis was employed. Conjoint analysis allows one to measure how different aspects of a trip affect consumer preferences, without asking respondents to rate preference and importance for each attribute individually. The approach is realistic in that it simulates real world choices – buyers can't always get everything they want in the real world; they must sometimes make difficult trade-offs and concessions. When people are forced to make tradeoffs, their true values can be identified.

  Conjoint involved presenting the respondents with a series of 16 trip scenarios on cards (an orthogonal array selected using a fractional factorial design), each of which described a realistic set of trip options. They were asked to rate the chance that they would take such a trip using the Juster Probabilistic Scale, which has proved to be unusually successful at predicting behaviour. An example of a trip scenario may be found in Appendix III.

  Another 2 "holdout" cards were rated as well, but not used to generate the scores for each attribute level. Instead, they were used to check the validity of the results by predicting what the score on the holdout cards would be, and then comparing the predicted to the observed ratings. The required high correlation between the predicted and observed holdout card scores was achieved (Kendall's tau=1.000). Correlation of predicted and actual values for the 16 design cards – on which the calculations were based – were also at the necessary high level (Pearson's R=.991, Kendall's tau=.950, significant at .0000).

- A pricing algorithm was developed for the study and the chances of purchasing an ag trip were established for various price levels, again using the Juster Scale.

The survey was administered on-site at each event, with attendees being intercepted at any point during their visit, since the topics covered were not directly relevant to the event. A small incentive, valued at $1, was offered. Respondents were either interviewed where they were intercepted or brought to an interview location where they were able to sit down. The survey was administered using CAPI (Computer Aided Personal Interviewing) with the questionnaire programmed into hand-held computers. This had the advantage of allowing complex skip and question rotation patterns to be accurately executed, but proved to be somewhat slower than when using a paper and pencil questionnaire.[3] Conjoint cards were presented to respondents on a ring, in randomised order.

The list of questions asked in the survey may be found in Appendix III.

All questions were extensively cross-tabulated, and analyzed using statistical techniques where appropriate. The output is shown in a separate volume of tables.

3. Two paper and pencil pilot tests established the interview time at 10 minutes, but the average time using the computers was over 15 minutes. Ambient temperature had a direct effect on the speed of operation of the computers as well.

Key findings from these results are discussed in the remainder of this report. Unless otherwise noted, all inter-group differences identified in the report were statistically significant. These differences define distinctions between sub-group profiles, attitudes and/or behaviours that may be useful in understanding an emerging market and in planning future marketing actions.

Summary of Key Findings

Definition

Based on factor analysis of a previous AAFRD study, four ag experience categories were the focus of this study. They included: Horse Riding On A Ranch; Country Shopping, Food And Entertainment; Having Fun Learning About The Country; and Attending Country Style Events. The experiences were described to respondents as follows:

- **Horse Riding On A Ranch** in the foothills or on the prairie; being instructed on horsemanship at a ranch riding camp; practicing reining and roping skills; participating in a cattle drive and learning how to sort and pen cattle; or experiencing the cowboy lifestyle while riding in a covered wagon, eating BBQ steaks and chuck wagon biscuits.
- **Country Shopping, Food And Entertainment** such as at a country fair which includes things such as baking, old time contests and country and western entertainment; shopping at a farmers market; tea in a heritage farmhouse; visiting local shops and learning about the art of country crafts and western trades like wheat weaving or blacksmithing; or U-pick fruits at a market garden.
- **Having Fun Learning About The Country** by taking a farm tour to better understand our crops, farm equipment, livestock and seasonal farm activities; tasting fresh honey and learning the ins and outs of honey production and beekeeping; touring processing facilities to learn how cookies, sugar, pea butter and sunflower seeds are made; or discovering the inner workings of a fruit or vegetable greenhouse operation.
- **Attending Country Style Events**, such as a large-scale farm animal and equipment exhibition; a western livestock auction; a horse breed show and sale; a rodeo; a heritage farm festival with threshing machines and tractor pulls; or a demonstration of stock dogs herding sheep.

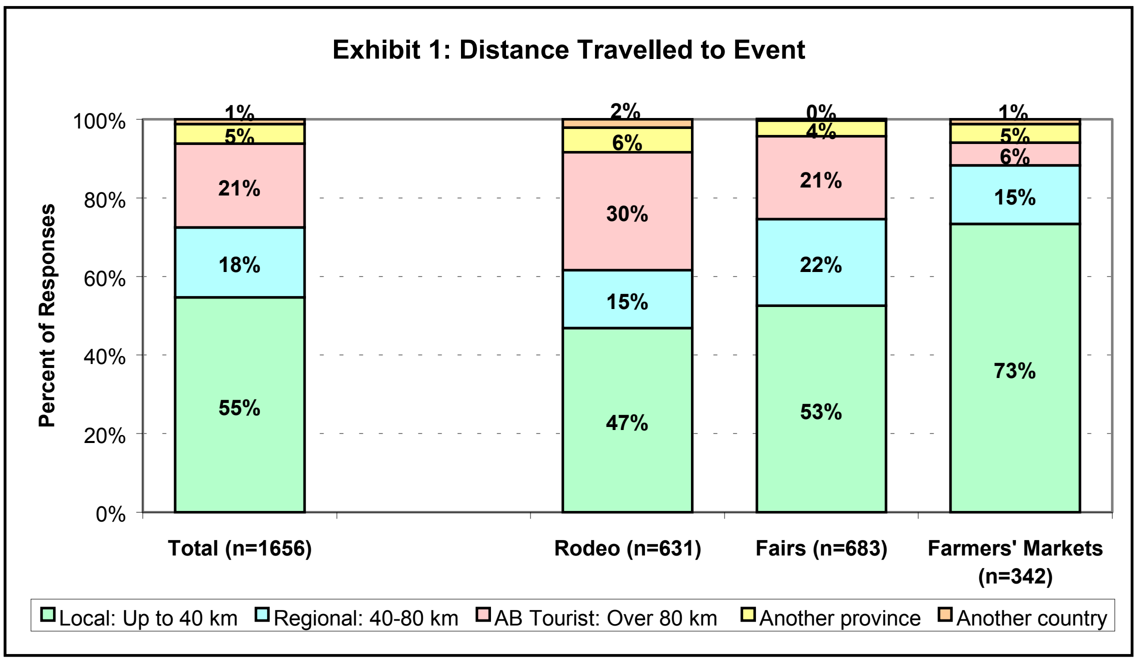
The Three Types Of Events Have Different Attendee Profiles

Each type of event – rodeos, fairs and farmers' markets – proved to have a somewhat different attendee profiles and these are discussed here, along with a brief comparison of the attendees at the individual events covered in the survey.

Geographic Differences

Most Visitors Were From The Local Area, Especially Those At Destination Farmers' Markets; Rodeo Attracted More Tourists

Tourists were defined as living at least 80 km or 50 miles away from their destinations. By this definition, the majority of attendees at all three types of events were not tourists. Exhibit 1 shows the distances travelled.



With over one-third of attendance by tourists, rodeos attracted people from further away than the other events and were also more likely to draw national and international visitors. The Lion's Labour Day Rodeo in Cochrane had the highest proportion of international attendance of all events (5%), while the Canadian Finals Rodeo (CFR) in Edmonton drew the most substantial proportion of visitors from other provinces (12%).[4]

Distances travelled to the event were shortest among destination farmers' market shoppers, with almost three-quarters being classified as locals, and only 12% as tourists.[5] It is of interest that the tourists were more or less equally divided between Alberta residents and non-residents.

Travel to fairs resembled the distance profile of the total population. However, this result hides wide variation between the events. Calgary's Aggie Days and Bon Accord's Haunted Pumpkin Festival both drew heavily on local markets, within 40 km of their location (about three-quarters of their attendance). At the Harvest Festival held at the Ukrainian Cultural Heritage Village, half were regional visitors, while Edmonton's Farmfair and the Lethbridge Expo and North American Seed Fair[6] both were far more likely to draw tourists (36% and 38% respectively, of which 7-8% were from out of province).

Ag Events Drew Primarily From Their Nearest Large Population Centre

In comparison with the provincial population distribution, ag event attendees were disproportionately drawn from rural areas, farms and ranches (31% vs. 19%). The disparity was particularly large for the two major urban centres – Calgary (21% vs. 30% of the population) and Edmonton (15% vs. 26%). The distribution of origin points for each type of event is shown in Table 3 below.

Table 3: Visitor Origin

	Total 1656=100%	Rodeos 631=100%	Fairs 683=100%	Farmers' Markets 342=100%
Calgary	21	19	18	31
Edmonton	15	8	20	21
Large urban area	7	6	5	11
Small urban area	12	9	14	12
Town	14	18	11	11
Rural other than a ranch or farm	11	11	11	10
Ranch or farm	20	29	21	4

Several patterns were of particular note:

4. As a point of validation, the CFR geographic profile obtained in this survey was within two percentage points of the profile reported in a study conducted for Northlands in 2003. Farmfair profiles lay within four percentage points.

5. This distribution of interviews was also directionally consistent with those of a survey conducted at the St. Albert and Millarville Farmers' Markets for AAFRD (undated), where31% at Millarville and 6% at St. Albert were non-locals (vs. 35% and 18% respectively in the present survey).

6. The proportion of non-resident visitors interviewed at the Lethbridge event was slightly higher (7% vs. 4%) than recorded from "deposited tickets" at the event in 2003.

- The farmers' markets drew the majority of their visitors from Calgary (Millarville) and the metro-Edmonton area (St. Albert), and virtually none from among people living on a farm or ranch. Low farmer/rancher attendance was also found at Aggie Days and the two country fairs (Harvest Fair and Haunted Pumpkin Festival).
- Rodeos may be less attractive to Edmontonians, but the location of the rodeos surveyed and other factors relating to rodeo size, the high proportion of tourists at the Edmonton rodeo and a lack of information on attendance by residents of the extensive metropolitan region surrounding the City of Edmonton, make it difficult to draw a definite conclusion. [7]
- Rodeos were more likely to bring in visitors who lived on a farm or ranch – particularly the two finals events (CFR at 28% and FCA Finals at 50%). In addition, the more business orientated fairs, Ag Expo and Farmfair, attracted a large proportion of farmers/ranchers (39% and 33% respectively).
- Roughstock Rodeo and Aggie Days drew primarily from among Calgary residents (half and three-quarters respectively), while nearby major centres were important to the Harvest Fair and Haunted Pumpkin Festival (50% and 41% from Edmonton respectively), Ag Expo in Lethbridge (one-third from a small urban centre) and the Lion's Labour Day Rodeo in Cochrane (31% from a town).

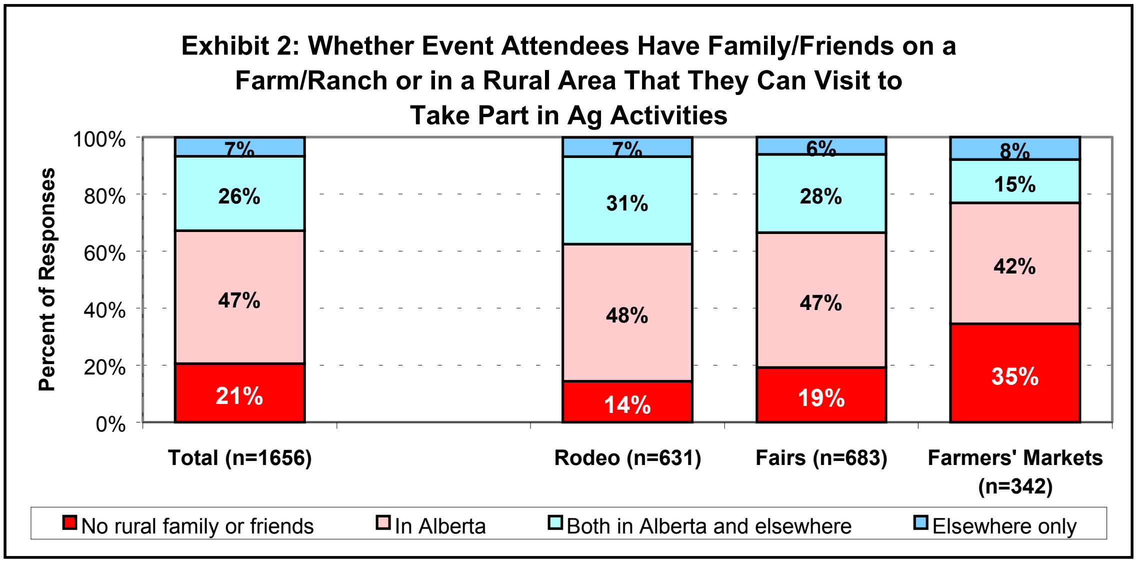
In other words, attendance at most ag events is highly dependent on residents of their nearby urban centres, while farm and ranch dwellers appear to visit the more important rodeos and business-related fairs.

The Vast Majority Of Ag Event Visitors Had Family Or Friends They Could Visit On A Farm, Ranch Or In A Rural Setting In Alberta

One of the issues identified as a barrier to agtourism as an economic product, was that many Albertans appear to have friends or relatives in rural areas, who they can visit and take part in agtourism activities at no cost. Such geographic linkages proved to be extensive in the target market. As shown in Exhibit 2, only 20% of attendees had no such personal ties to rural inhabitants. The vast majority had rural connections in Alberta (73%), and a substantial proportion had such links elsewhere (33%).

Exhibit 2 also shows that rural connections were most prevalent among rodeo and fair goers, while over one-third of shoppers at farmers' markets had no such contacts. Nevertheless, there were individual event exceptions. Aggie Days visitors, like the two farmers' markets, were less well connected (31%) while Farmfair, like the CFR rodeo, had the highest rural affiliation rates (91%, many outside the province).

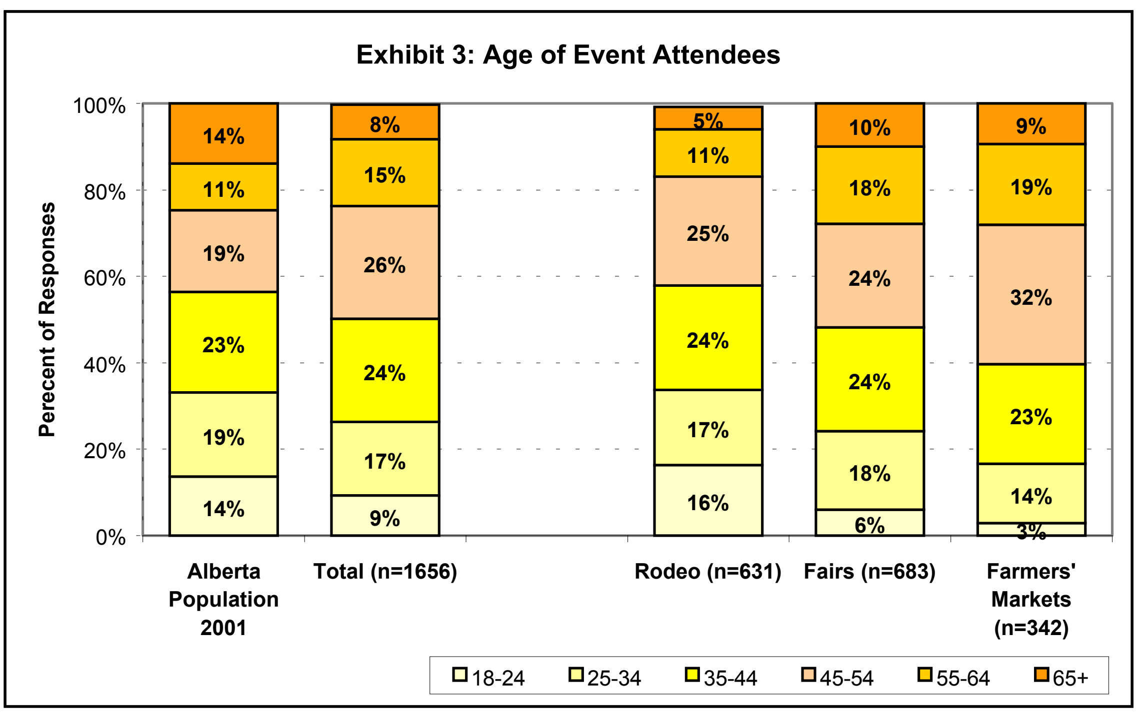
[7] Origin categories used in the survey simply identified Edmonton residents; event attendees living in neighbouring urban areas would have used such categories as "large" or "small urban area" to describe their place of residence and their location in the Edmonton metro region can only be inferred based on the location of the event.



Demographic Differences

Ag Event Visitors Were Older Than The Population

Exhibit 3 compares the profile of surveyed ag event attendees aged 18 and over with the profile of the Alberta population. The results clearly demonstrate that these events were disproportionately likely to attract middle aged adults (45-64 years), and less likely to bring in both the youngest (18-24 years) and oldest (65+ years) age cohorts.



On average, adult visitors to farmers' markets were older (47.4 years), while rodeo attendees were younger (41.0 Years) – due to a high concentration of 18-24 year olds. Average age of fair goers was 45.5 years vs. 44.2 years for the complete sample of event attendees.

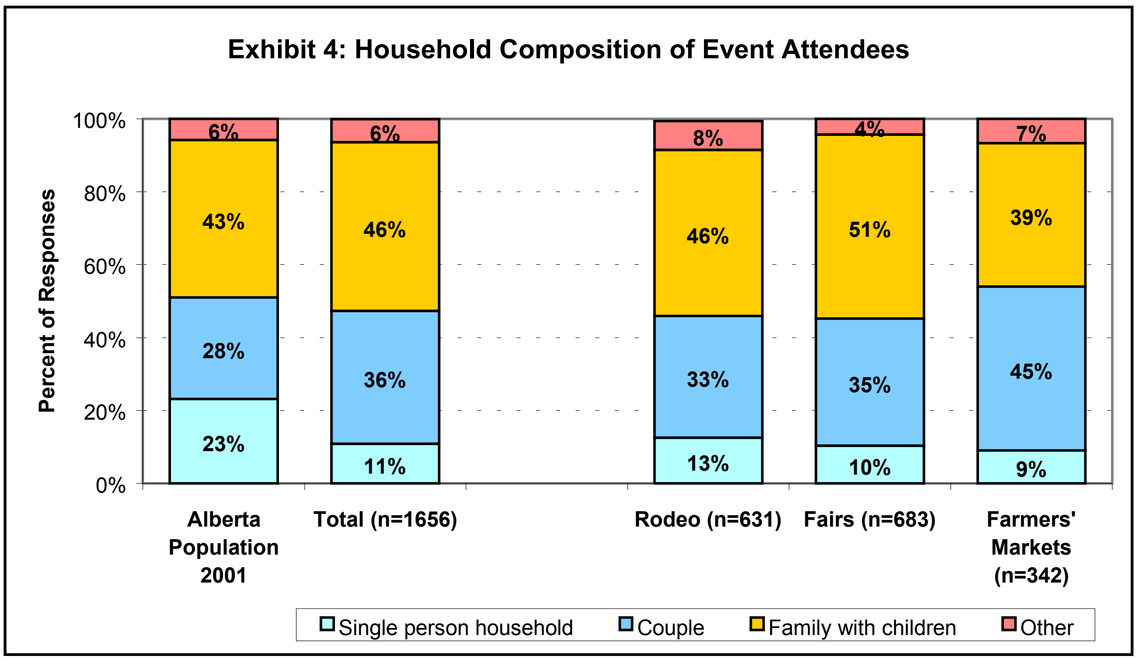
Individual event age profiles were notably different for the following:

- FCA Finals attracted the greatest proportion of 18-24 year olds (25% of their attendees), with the other rodeos only slightly above average.
- The Haunted Pumpkin Festival attracted proportionately more younger people, in the 25-44 age groups.
- Ag Expo and Harvest Fair had the oldest age profiles, with an average age of 50.2 years and a large proportion in the two oldest age cohorts (55+ years).

These age profiles are directly linked to household life stage, described next.

Couples And Families Were More Likely To Attend Ag Events

Using a combination of information – number of people in the household, age of the respondent and age of the youngest child – ten household life stage groups were derived. For comparison with Census 2001 profiles, these have been collapsed into four household composition groups in Exhibit 4.



Visitors to ag events were somewhat more likely to be couples and far less likely to be singles than might be expected in the general population. Families were also slightly over-represented.

A more detailed breakdown of life stage is shown in Table 4 overleaf.

From this table it may be seen that the largest group of visitors were empty nesters (older couples with no children of any age in the home) – and especially at farmers' markets, where they made up one-third of the attendance. As a result, farmers' markets households were smaller than average in size.

At fairs, another large group was preschool families (youngest child under 6 years of age). However, preschool families (and to a lesser degree, young families, where the youngest child was 6-12 years old) were concentrated at Aggie Days and the Haunted Pumpkin Festival where they made up 43% and 51% of attendees respectively. Older adults at these fairs (21% at Aggie days, 14% at the Haunted Pumpkin Festival) may well have been grandparents, but this is not known from the data. Harvest Fair and Ag Expo also had a totally different life stage profile, with over half the attendees falling into the older adult life stages.

Table 4: Household Life Stage*

	Total 1656=100%	Rodeos 631=100%	Fairs 683=100%	Farmers' Markets 342=100%
Bachelor	5	8	3	3
Young group	4	6	2	3
Young couple	11	13	8	12
Pre-school family	15	11	23	9
Young family	13	12	14	12
Teen family	11	15	8	9
Grown family	7	8	6	9
Empty nesters	25	20	27	33
Older group	3	3	2	4
Older single	6	4	7	6
Average household size	**2.89**	**2.91**	**2.95**	**2.75**

* Bachelor and older singles were one-person households, with bachelors defined as being 18-44 years old, and older singles as aged 45+.

Groups were households with more than two people, but no children of any age; older and younger were split as above.

The age of the youngest child was <6 in preschool families, 6-12 in young families, 13-17 in teen families and 18+ in grown families.

In the previous discussion of respondent age, it was noted that rodeos had a greater concentration of 18-24 year olds, particularly at the FCA Finals. From the life stage profile of FCA Finals attendees, it became apparent that only some members of this young group were living independently, while most were still living with their parents. (However, we do not know from the survey whether they were at the rodeo with friends or with their families.) The other three rodeos included an above average proportion of bachelors.

Household Income Was Higher Than Average

Average household income of event attendees in 2003 was estimated at $74,900 from responses by 91% of households, while the median was $74,000. This was substantially higher than Census figures for provincial household income in 2000 ($64,200 on average, median $52,500) and higher than projections for 2003 (an average of $63,600).[8]

The income distribution for the three types of events is shown in Table 5.

Overall, farmers' market shoppers were the most affluent, particularly at Millarville. Fair goers as a group had lower than average incomes, though income was significantly higher at the Haunted Pumpkin Festival and significantly lower at Ag Expo.

Table 5: Household Income

	Total 1656=100%	Rodeos 631=100%	Fairs 683=100%	Farmers' Markets 342=100%
Under $50,000	26	28	28	20
Over $50,000 to $80,000	25	24	24	28
Over $80,000 to $120,000	23	23	22	24
Over $120,000	15	16	13	18
Refused/partial information	11	9	13	10
Average Income ('000)	**$74.9**	**$75.0**	**$71.8**	**$80.7**

Cross-Event Attendance Varies

An opportunity was provided in Edmonton and Calgary to assess the extent to which visitors attend more than one type of event. CFR/Farmfair and Roughstock/Aggie Bays included both a rodeo and a fair at the same venue, covering an overlapping timeframe. The results showed that fair goers were less likely to attend the rodeo (36% at Farmfair, 24% at Aggie Days), than rodeo attendees were to visit the fair (58% of rodeo fans at CFR and 47% at Roughstock also attended, or planned to attend, the fair).[9]

This finding points to the fact that the various components of combined events are each destination activities in themselves for many, if not the majority, of attendees.

Discussion

The results of the survey have shown that there are not only geographic and demographic differences between attendees at the three types of major events included in the sample, but that individual events

7. Source: FP Markets: Canadian Demographics 2003.

8. A similar pattern was also found at CFR/Farmfair in 2003.

of the same type can attract very different audiences. These differences are probably based on the location of the event, its size/importance and the nature of the attraction being offered. We suspect that marketing plays a role too. For example, two fairs which are promoted as being for children, clearly bring in just that audience, while food and shopping based farmers' markets and the Harvest Fair attracted a higher than average proportion of middle-aged and older people.

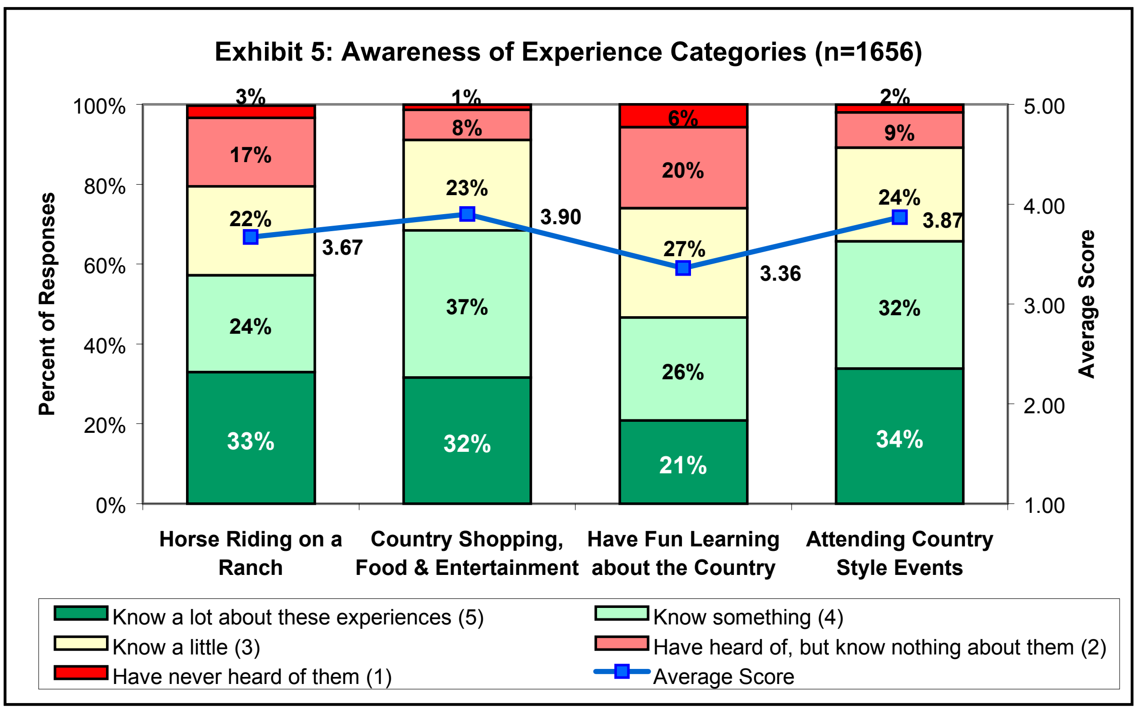
The results concerning cross-attendance at different types of events are of great interest for future promotional purposes and will be further investigated within the context of the four experience categories. Rodeos and some fairs actually fall into two different ag experience categories, which, by definition, are expected to generate interest among different people. Rodeo and "trade" events (oriented to business) are included in the Country Style Events group, while "country" fairs (oriented to entertainment and food) are included in the Country Shopping, Food and Entertainment group.

Awareness Of Agtourism Experience Categories

Country Shopping, Food & Entertainment And Country Style Events Were The Most Widely Known Experience Categories

The description of an experience category (as defined on p. 8) was read to respondents, followed by a question about their awareness of this type of activity as something to experience on a pleasure trip in Alberta: "The … (first/ next) group of activities includes … READ ACTIVITY DESCRIPTION. ROTATE ORDER. Please tell me how much you know about these types of activities as something to experience on a pleasure trip in Alberta."

The results are shown in Exhibit 5 and suggest greatest familiarity with activities involved in Country Shopping, Food & Entertainment and Country Style Events. Least familiar were activities where one could have Fun Learning About the Country, as one-in-four people felt they knew nothing at all about them. One-fifth of event attendees felt they lacked any knowledge about Horse Riding on a Ranch.



Notable event, demographic and geographic differences for each type of experience were as follows:

- The category of **Country Shopping, Food & Entertainment** was most familiar to visitors at farmers' markets (which it encompasses – average score 4.05[10]), and also to FCA Finals rodeo attendees (4.12). Women (4.02) and people in the age group 55-64 (4.12) had higher levels of awareness, while younger adults 18-34 (3.66) living in young adult households and preschool families (3.72) were less likely to know of these experiences. Geographically, people living in towns and rural areas (4.05) were more aware, and people in Calgary (3.66) and those who did not have friends and relatives they could visit in a rural area (3.56), were less aware of such activities.
- **Country Style Events** were best known by rodeo visitors (4.13), especially at FCA Finals (4.43), but less well known by shoppers at farmers' markets (3.43) and at fairs with child appeal (Aggie Days – 3.63, Haunted Pumpkin Festival – 3.51). Consistent with this finding, 25-34 year old parents of preschool families were significantly less aware of these opportunities (3.61). More familiar with the country events category, were men (3.97 vs. 3.77 for women), older visitors (55-64 years - 4.06), people travelling 80+ km to the event they attended (4.24) and people who live on a farm or ranch (4.48) or who had access to one (4.03 vs. 3.26 for those without rural friends or family to visit). Those with lowest awareness were local visitors to an event (3.71), especially from the major metropolitan centres (Calgary – 3.54, Edmonton – 3.52).
- **Horse Riding on a Ranch** as something to do on a pleasure trip was best known by rodeo fans (4.07), especially at the FCA Finals (4.39). It was less well known among farmers' market visitors (3.27) and at fairs (3.60). The youngest age category (18-24 – 4.01) and teen families (3.90) expressed greatest knowledge of this experience category. Geographically, the profile was almost identical to Country Style Events, with higher awareness among Alberta tourists (4.01), farm/ranch families (4.29), people with personal access to rural residents (3.83 vs. 3.04 without), and lower awareness in the cities and other urban centres (3.38-3.43).
- The experience category encompassing **Fun Activities to Learn About the Country**, was most familiar to CFR/Farmfair (3.72), FCA Finals (3.62) and Harvest Fair (3.70) attendees, and least well known among farmers' markets shoppers (3.10), 25-34 year olds (3.04), preschool families (3.09), Calgary residents (3.07) and local visitors (3.22). 55-64 year olds (3.58), Alberta tourists (3.61), farmers/ranchers (3.78) and people with informal access to a rural experience (3.50 vs. 2.81 who did not) were more knowledgeable about the category.

Discussion

There remains considerable room for ag event attendees to become more familiar with the types of activities that are available on a pleasure trip in Alberta. Awareness was notably lower for learning and ranch-based horse riding opportunities, but even among the better known experience categories, only one-third felt they 'knew a lot' about the activities described.

Common threads found in the profiles of those who were significantly more or less aware of these experiences were the following:

- FCA Finals rodeo attendees claimed unusually strong knowledge of all four experiences;

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9. Out of 5, where 5 = Know a lot about these experiences, 4 = Know something, 3 = Know a little, 2 = Have heard of but know nothing about them, 1 = Have never heard of them.

- Excluding Horse Riding on a Ranch, visitors aged 55-64 had higher awareness of ag events while 25-34 year old parents of preschool families were less knowledgeable;
- The youngest age group, and teen families, knew most about ranch-based horse riding and were less familiar than average with Country Shopping, Food & Entertainment;
- Living on a farm/ranch (which is strongly associated with travel distances of 80+ km to an ag event[11]) and having friends or relatives to visit in a rural area or on a farm/ranch, were important predictors of high awareness in all categories other than Country Shopping, Food & Entertainment.

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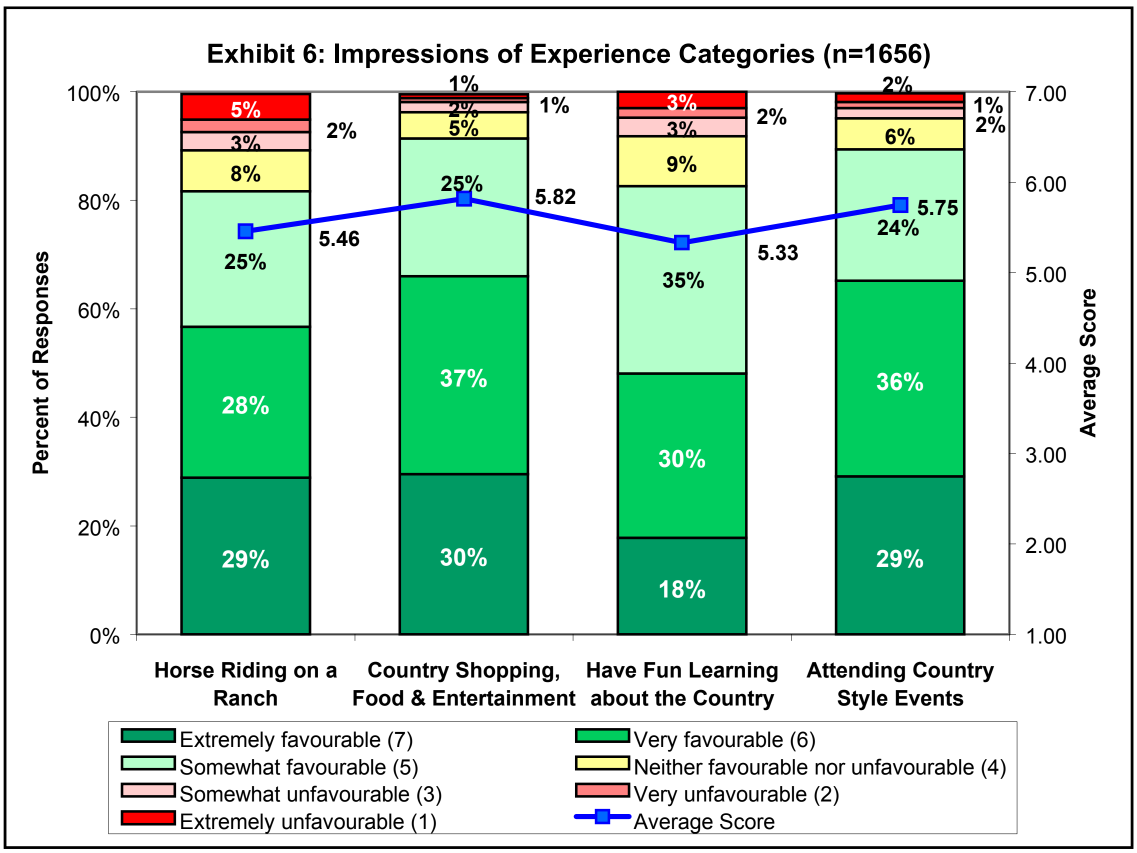
10. 43% of the farmers/ranchers interviewed traveled 80+ km to the event, compared to 21% of all event attendees. This group also made up 41% of the Alberta tourists interviewed, with other resident tourists drawn from: towns (16%), other rural settings (14%), Calgary (10%), small urban areas (9%), Edmonton proper (5%) and large urban areas (4%, many of which appear to have been near Edmonton).

Impression Of Agtourism Experience Categories

Country Shopping, Food & Entertainment And Country Style Events Were The Most Favourably Viewed Experience Categories

Respondents were next asked to rate their attitudes to the four experience categories by responding to the question, "And what is your impression of … (Ranch-based horse riding experiences / Country shopping, food and entertainment activities / Fun activities to learn about the country / Country style events) like these as something for you and the people you travel with to do, when taking a pleasure trip in Alberta."

The responses are shown graphically in Exhibit 6.



Country Shopping, Food & Entertainment and Country Style Events proved to be the most favourably regarded activity groups, with few people rating them negatively.

The largest proportion of unfavourable responses was obtained for Horse Riding on a Ranch. However, 82% viewed these activities positively, and the proportion who felt "extremely favourable" about them, was just as high as for the first two categories. If, as is likely, the unfavourable ratings represent a core group with absolutely no interest in anything to do with horses, their scores do not detract from the appeal of ranch-based horse riding experiences among others visiting ag events.

The least favourably regarded category of the four was Have Fun Learning About the Country. While there were fewer negative impressions, the level of enthusiasm for the type of activities mentioned here was lower, particularly in the top two response categories ("extremely" and "very" favourable).

Experience Influences Perceptions

Albertans who had taken part in at least one of the experiences in the category at some time in the past were far more favourably inclined to the category. It should be noted that this is not necessarily a cause and effect relationship, but may reflect an underlying pre-disposition or interest that drove action in the first place. The average scores are shown in Table 6.

In some categories scores were also statistically significant different depending on where the respondent participated. Scores were more favourable than average when the respondent had been Horse Riding on a Ranch or to a Country Style Event in the USA. Scores for Alberta were average as most participants had enjoyed the experience in the province (discussed later in the report) .

Table 6: Impressions of Experience Categories by Previous Participation in the Category and Where Participated

(Base = Albertans only)

	Average Score					
	Ever Participated in Category		Where Participated			
	Yes	No	In Alberta	Elsewhere in Canada	USA	Another Country
Horse Riding on a Ranch	6.03	4.93	6.08	6.10	6.33	6.27
Country Shopping, Food & Entertainment	6.03	4.99	6.06	6.07	6.07	6.05
Fun Learning About the Country	5.82	4.89	5.85	5.86	5.88	5.73
Country Style Events	6.05	5.01	6.07	6.18	6.28	6.08

Note; Sample size varied for each cell based on participation.

Impressions Varied With Event Attendance, Demographic and Geographic Affiliation

Turning now to event, demographic and geographic differences in attitudes, the following are of interest:

- **Country Shopping, Food & Entertainment**, the most favourably viewed group of ag experiences, had widespread appeal. The few groups that showed significant differences from the overall ratings included: more favourable ratings from visitors to the Millarville Farmers' Market (6.14),[12] women (6.00) and people living in towns or a rural area other than a farm/ranch (6.00). It was viewed less favourably than average by attendees at the Roughstock Rodeo (5.42) and the Ag Expo & North American Seed Fair (5.49), also by the youngest age groups (18-24 years – 5.59, 25-34 years – 5.64), though the age difference was not significant.
- **Country Style Events** were most positively assessed by country people – those living on a farm/ranch (6.24) or in a town or rural area (5.92), who had travelled 80+ km to the event (6.04) and were visiting CFR/Farmfair (6.05) or the stand-alone rodeos (FCA Finals – 6.51, Lion's Labour Day Rodeo – 5.98). Country Style Events were least favourably rated by local visitors (5.58), urbanites (Calgary – 5.55, Edmonton – 5.46, other urban – 5.46) and people without friends and family to visit in rural areas (5.24). Attendees at farmers' markets (5.23) and the Haunted Pumpkin Festival (4.99) had a poorer impression of these types of events. There were no significant demographic differences.
- **Horse Riding on a Ranch** as something to do on a pleasure trip, appealed most to rodeo visitors (5.80) – supporting previous observations that people who like horses like pretty much anything to do with them. Horse Riding on a Ranch was of significantly lower interest to farmers' market visitors (4.83). Favourability ratings were higher than average at all rodeos and lower at both farmers' markets, most notably in St. Albert (4.64). Among the fairs they were high at Farmfair (5.77) and low at Ag Expo (5.13). Demographically, 18-24 year olds (5.85) living in young adult households (5.84) were more, and 65+ year olds (4.85) living in older adult households (5.15) were less, favourable in their views. The only geographic difference was that people without informal access to rural areas scored the experience as being of lower interest (5.03).
- **Fun Activities to Learn About the Country** was, as a category, of greatest interest to fair goers (5.50), especially at Farmfair (5.65) and the Harvest Fair (5.69). Interest ratings were somewhat lower at farmers' markets (5.06), particularly in St. Albert (5.01). The category was also less favourably rated by 18-24 year olds (5.04), especially those in teen families (5.10 - not significant), and by people without access to rural friends and relatives (5.09).

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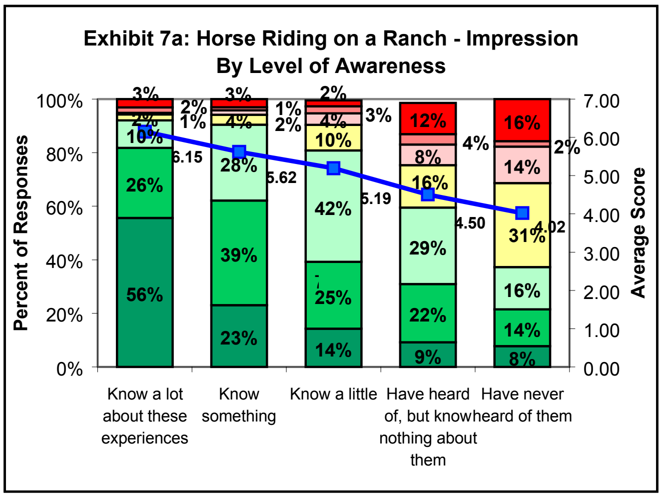
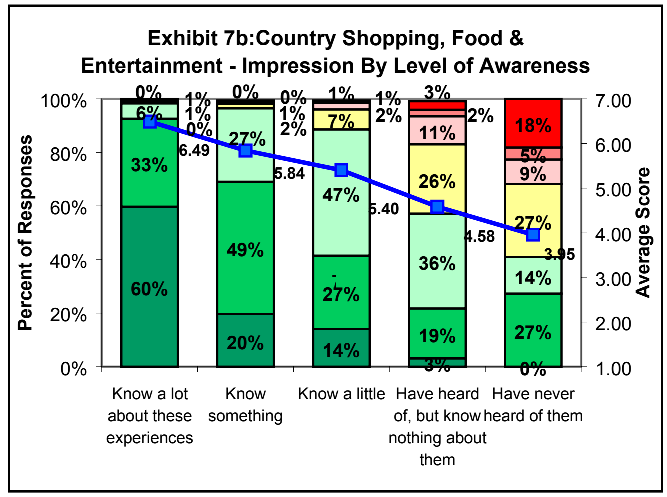
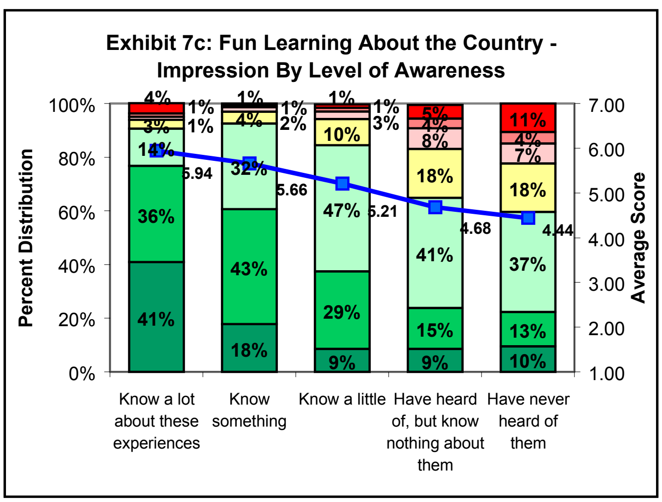
11. Out of 7, where 7 = Extremely favourable, 6 = Very favourable, 5 = Somewhat favourable, 4 = Neither favourable nor unfavourable, 3 = Somewhat unfavourable, 2 = Very unfavourable and 1 = Extremely unfavourable.

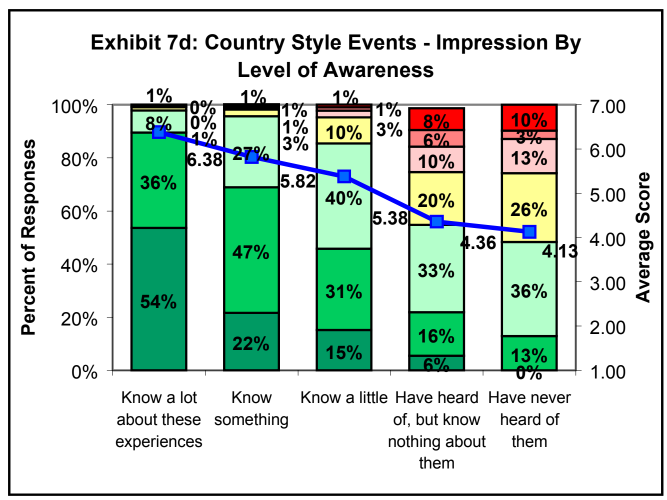
THERE IS A DIRECT RELATIONSHIP BETWEEN HIGH FAMILIARITY AND HIGH FAVOURABILITY

Turning now to the relationship between awareness and impressions, it may be seen in Exhibits 7a – d that there is a direct link between degree of familiarity with, and attitudes to, ag experiences. Those who were most familiar also tended to have a far more favourable impression of the experience category and vice-versa.









Extremely favourable (7) | Very favourable (6) | Somewhat favourable (5)
Neither favourable nor unfavourable (4) | Somewhat unfavourable (3) | Very unfavourable (2)
Extremely unfavourable (1) | Average Score

Note: People who had never heard of the activities in an experience category provided their impressions based on the description read out to them.

Some notable differences between the experience categories included:

- Greater disparity between those most and least knowledgeable about Country Shopping, Food & Entertainment than the other groups. This is seen in the steeper decline in average scores, with those most knowledgeable having the highest score of all four groups and those who had never heard of the activities in the category providing the lowest ratings,
- The proportion of people who had any knowledge of the activities involved in the group Fun Learning About the Country, and gave it an "extremely favourable" rating, was lower than for the other experiences.
- Based on previous findings, it is not unexpected that there would be people with all levels of awareness who rated Horse Riding on a Ranch negatively.

DISCUSSION

On the whole, all four ag experience categories were rated quite favourably by the majority of event attendees surveyed, though Fun Learning About the Country and Horse Riding on a Ranch were somewhat less well regarded than Country Shopping, Food & Entertainment and Country Style Events.

Unlike the awareness measure, high and low levels of approval of these experiences as something to do on a pleasure trip in Alberta, did not have similar event, demographic and geographic profiles across the experience categories. In fact, there were some distinctive differences. Country Style Events appealed particularly to people already living in, or with access to, the country. Horse Riding on a Ranch appealed especially to rodeo fans and the very youngest age group (18-24 years). The same age group tended not to like the idea of activities to Learn About the Country, which were most positively perceived by fair goers. Country Shopping, Food & Entertainment appealed more to visitors to farmers' markets … who showed less than average interest in all three of the other ag experience categories.

There was also a well defined connection between higher levels of knowledge about an experience category and more positive perceptions about it. This suggests that informed awareness may be a critical component for creating positive perceptions of ag experiences.

Participation In Agtourism Experiences

Participation Was Highest In Country Shopping, Food & Entertainment And Country Style Events

To examine the extent to which ag event attendees have participated in these types of ag experiences, respondents were asked the following series of questions:

- (Not counting today,) have you participated in … (Ranch-based horse riding experiences / Country shopping, food and entertainment activities / Fun activities to learn about the country / Country style events) like these while on a pleasure trip? (WHERE APPLICABLE, EXCLUDE TODAY'S TRIP)
- IF YES: Where have you participated in …(Ranch-based horse riding experiences / Country shopping, food and entertainment activities / Fun activities to learn about the country / Country style events) on a pleasure trip. Was this in … Alberta; another Canadian province or territory; the USA; another country?
- IF YES TO ALBERTA OR ANY OTHER: (Not counting today,) in the last 12 months, how many times have you taken a pleasure trip which included … (Ranch-based horse riding experiences / Country shopping, food and entertainment activities / Fun activities to learn about the country / Country style events) at a destination … (in/outside Alberta) that was more that 80 km or 50 miles away from your home?

Participation in the four experience categories while on a pleasure trip at any time in the past is shown in Table 7.

Table 7: Past Participation in Agtourism Experiences

	Total 1656=100%	Rodeos 631=100%	Fairs 683=100%	Farmers' Markets 342=100%
Horse Riding on a Ranch	48	57	43	36
Country Shopping, Food & Entertainment	79	77	77	88
Fun Learning About the Country	46	48	47	41
Country Style Events	70	78	68	58

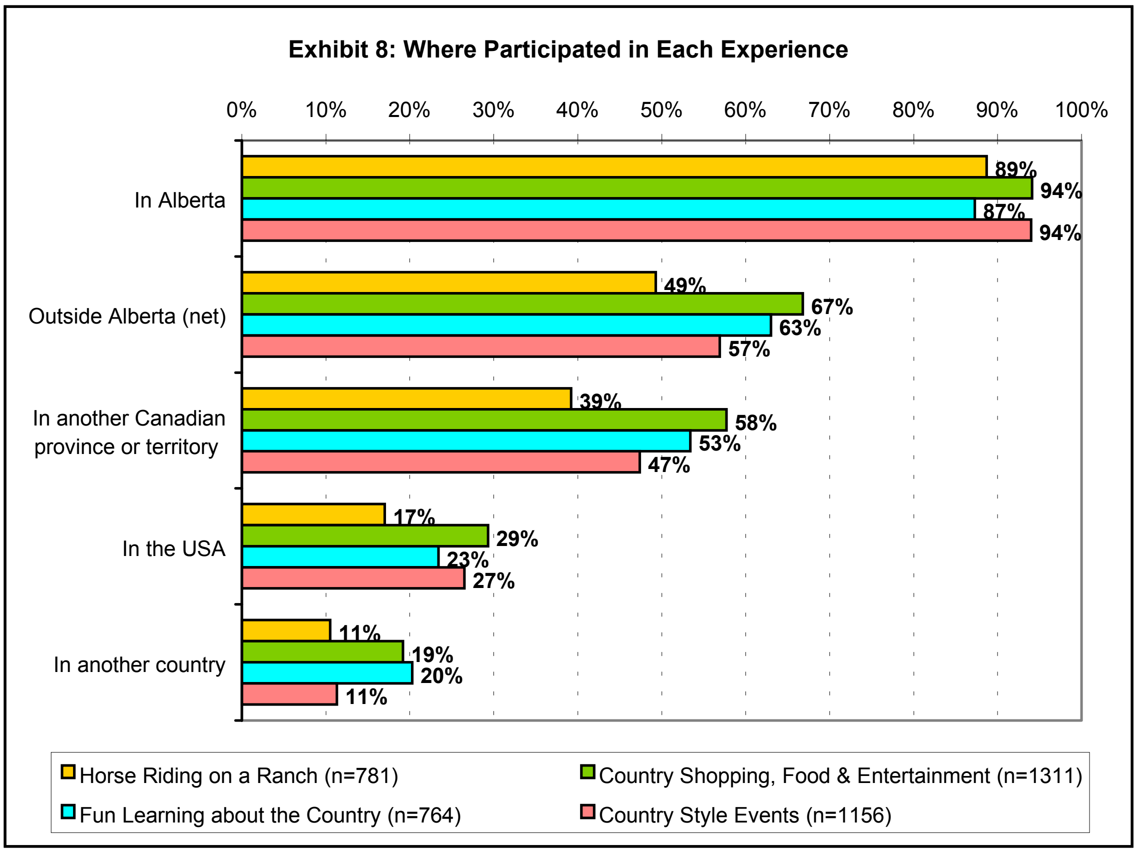
The most popular types of ag activities among event attendees were Country Shopping, Food & Entertainment and Country Style Events – the same groups which earned higher awareness and favourability ratings. The other categories, Horse Riding on a Ranch and Fun Learning About the Country had far lower participation rates.

Farmers' market shoppers showed their affinity for Country Shopping, Food & Entertainment with a higher than average participation level and, consistent with the lower interest they showed in the other experience categories, they were also less likely than average to have tried them.

Rodeo attendees were more likely to have been Horse Riding on a Ranch while on a pleasure trip in the past, while fair goers showed no particular differences against the average in their choice of activities.

ALBERTA WAS THE MOST VISITED DESTINATION FOR ALL EXPERIENCE CATEGORIES; THERE HAS BEEN EXTENSIVE EXPOSURE OUTSIDE THE PROVINCE AS WELL

The destinations on these trips are shown in Exhibit 8, with further detail in Table 8.



Overall, almost everyone who had taken a trip that involved these experience categories had done so in Alberta.

In addition, between half and two-thirds had had these types of experiences outside the province. Country Shopping, Food & Entertainment and Fun Learning About the Country were most likely to have been done out-of-province, especially in Canada and overseas. Lowest participation outside Alberta was found for Horse Riding on a Ranch.

The more detailed data in Table 8 show the types of trips taken by attendees at the three types of events.

Table 8: Where Participated in the Past in Agtourism Experiences

	Event Attendees Who Had Participated in the Experience During a Pleasure Trip in the Past, at Any Destination			
Horse Riding on a Ranch	**Total 781=100%**	**Rodeos 361=100%**	**Fairs 296=100%**	**Farmers' Markets 124=100%**
In Alberta	89	90	90	82
Outside Alberta (net)	49	51	47	51
▪ Other Canada	39	40	38	40
▪ USA	17	23	12	13
▪ Another country	11	11	8	14
Country Shopping, Food & Entertainment	**Total 1311=100%**	**Rodeos 487=100%**	**Fairs 523=100%**	**Farmers' Markets 301=100%**
In Alberta	94	94	96	91
Outside Alberta (net)	67	63	66	75
▪ Other Canada	58	52	57	67
▪ USA	29	32	25	32
▪ Another country	19	17	16	30
Fun Learning About the Country	**Total 764=100%**	**Rodeos 305=100%**	**Fairs 320=100%**	**Farmers' Markets 139=100%**
In Alberta	87	89	90	78
Outside Alberta (net)	63	62	59	74
▪ Other Canada	53	53	50	62
▪ USA	23	28	19	22
▪ Another country	20	20	18	27
Country Style Events	**Total 1156=100%**	**Rodeos 493=100%**	**Fairs 466=100%**	**Farmers' Markets 197=100%**
In Alberta	94	94	95	90
Outside Alberta (net)	57	60	55	54
▪ Other Canada	47	48	48	45
▪ USA	27	35	21	19
▪ Another country	11	11	10	13

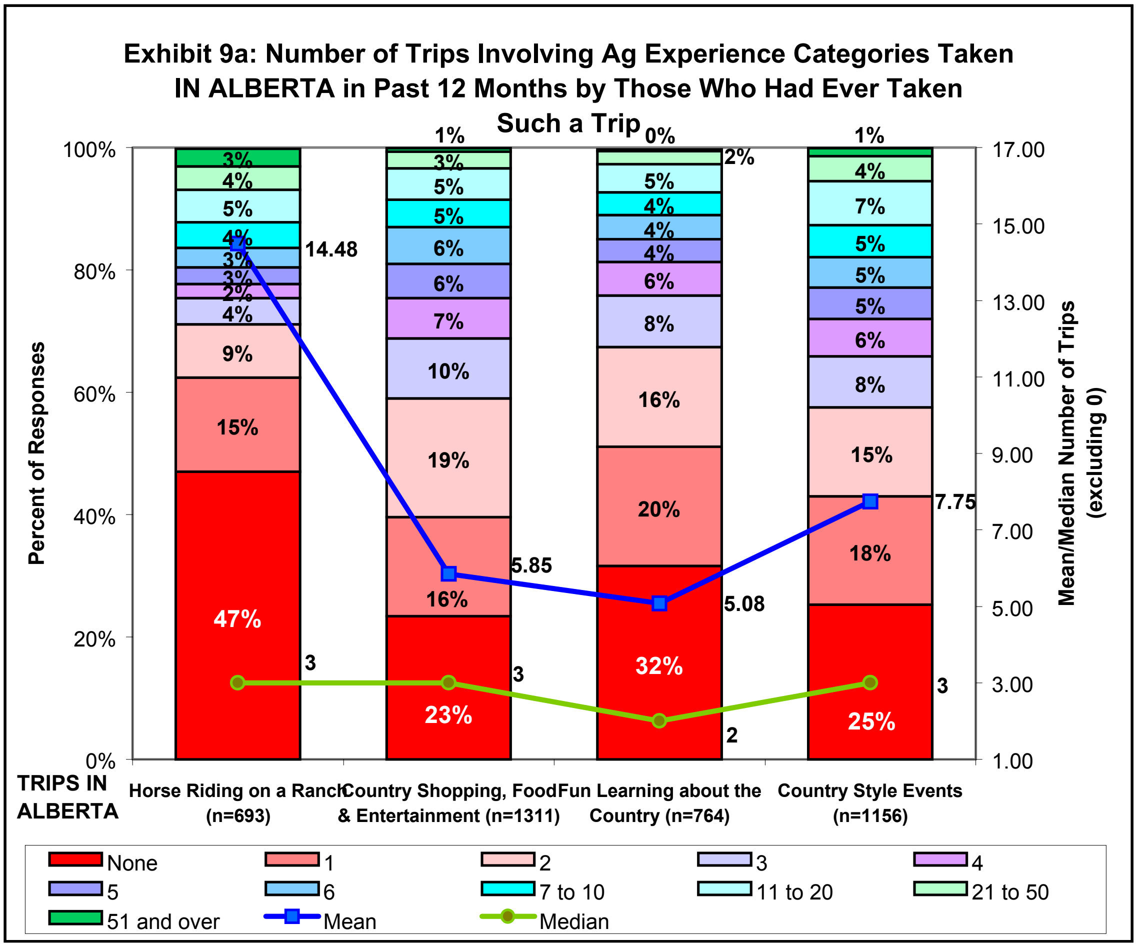
Two patterns were evident here:

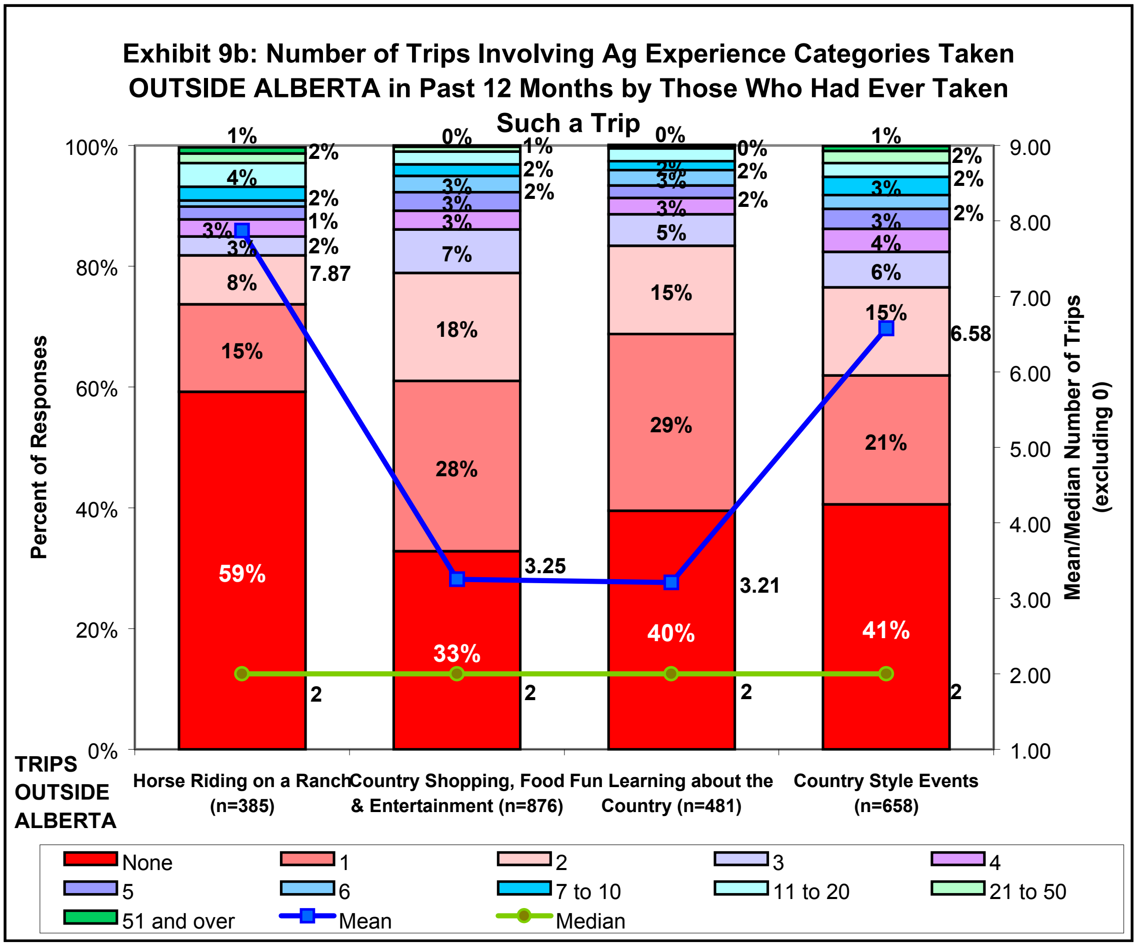
- Farmers' market visitors were slightly less likely to have had ag experiences in the province. They were more likely to have participated in Country Shopping, Food & Entertainment and Learning About the Country elsewhere in Canada and overseas.

- Rodeo attendees were more likely than those at other types of events to have participated in these activities in the USA – especially Horse Riding on a Ranch and Country Style Events.

Repeat Experiences Were Less Likely In The Past Year For Horse Riding On A Ranch, But With High Frequency

The previous results addressed the question of whether a respondent had ever taken a trip that involved activities in each ag experience category. Exhibits 9a – b look at the extent to which these past visitors have enjoyed the experience in the preceding 12 months, as well as how often they made such trips.





These graphs show that:

- Respondents who had participated in ag experiences on a trip in the past were less likely to have gone Horse Riding on a Ranch in the last 12 months, either in Alberta or outside the province, than to have participated in the other types of ag activity clusters.
- However, those that did take a ranch-based horse riding trip recently, appear to have done so far more frequently than participants in the other groups of activities. Nevertheless, since the average number of trips far exceeded the median (which was similar to the other experiences), the results suggest that a small number of respondents who took a very large number of trips had a strong effect on the mean. Many in this group were interviewed at the FCA Finals. Review of the detailed data, showed that 3% claimed to have made over 50 such trips in Alberta (ranging from 52 to 400) and 1% outside (ranging from 80 to 120).
- A similar issue arose with regard to Country Style Events attended outside the province in the past year.
- Country Shopping, Food & Entertainment was the most likely of the four activity groups to have occurred in the past year both inside and outside the province.

Recent Trip Frequency Was Highest Among Rodeo, And Lowest Among Farmers' Market Attendees

Differences were observed in participation and frequency by type of event attended. These results may be seen in Table 9.

Looking at **Horse Riding on a Ranch**, the figures show that:

- Visitors to rodeos were both more likely to have participated in ranch-based horse riding inside and outside Alberta than visitors to the other types of events (65% and 56%). They also claimed to have made three times the number of trips of people at other types of events.
- The rate of recent visitation (an approximate measure of repeat visitation) was especially low among farmers' market shoppers (34% in Alberta, 21% elsewhere vs. 53% and 41% overall).

Geographically and demographically, the following differences were also found:

- People living on farms/ranches were more likely to have participated in ranch-based horse riding experiences while on a pleasure trip (56% vs. 47% overall).
- Those with access to ag experiences through friends and relatives were more likely to have taken such trips in Alberta in the past (90% vs. 81% without), and the latter group took fewer trips, either in Alberta (4 vs. 15) or outside (3 vs. 9).
- Canadian/international tourists were less likely to have taken their ranch-based horse riding trips in Alberta (49% vs. 89% overall) and more likely to have done so elsewhere.
- Calgary, Edmonton and other urban area residents, and local visitors, took fewer trips that included ranch-based riding outside the province (3 vs. 8 on average).

Country Shopping, Food & Entertainment:

- Enjoyed a high level of participation among attendees at all types of ag events.
- Was more likely to be done in Alberta than outside by rodeo and fair attendees. On the other hand, farmers market attendees, were less likely than average to participate in this, their own experience category, in Alberta.[13]

There were few geographic and demographic differences of note:

- People without informal access to ag activities were less likely to have participated in Country Shopping, Food & Entertainment (72% vs. 81% with access to rural friends and family).
- Canadian/international tourists were more likely to have participated in this group of activities outside the province (95% vs. 67% on average), while Edmontonians were less likely to do so (56%).

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12. In fact, farmers' market attendees were less likely than average to participate in all four experience categories – both in terms of percent participating in the past year and in terms of number of trips. However, the lower rate was confined to Alberta as the destination; in other places the rate was similar to the average and to that of fair goers. Note also that both farmers' market and rodeo attendees excluded the visit they made that day.

Table 9: Number of Trips Taken in Past 12 Months That Included Ag Experiences by Destination

	Event Attendees Who Had Participated in the Experience During a Pleasure Trip at Any Time in the Past, in Alberta or Outside			
Horse Riding on a Ranch In Alberta	**Total 693=100%**	**Rodeos 323=100%**	**Fairs 268=100%**	**Farmers' Markets 102=100%**
None in past 12 months	47	35	54	66
One or more	53	65	46	34
Average number of trips	14.5	20.1	6.6	7.9
Median number of trips	3	4	2	2
Horse Riding on a Ranch Outside Alberta	**Total 385=100%**	**Rodeos 183=100%**	**Fairs 139=100%**	**Farmers' Markets 63=100%**
None in past 12 months	59	44	71	79
One or more	41	56	29	21
Average number of trips	7.9	10.5	2.9	2.2
Median number of trips	2	3	2	1
Country Shopping, Food & Entertainment In Alberta	**Total 1233=100%**	**Rodeos 475=100%**	**Fairs 501=100%**	**Farmers' Markets 275=100%**
None in past 12 months	23	16	25	33
One or more	77	84	75	67
Average number of trips	5.8	7.5	4.5	5.2
Median number of trips	3	3	3	2
Country Shopping, Food & Entertainment Outside Alberta	**Total 876=100%**	**Rodeos 306=100%**	**Fairs 343=100%**	**Farmers' Markets 227=100%**
None in past 12 months	33	31	36	31
One or more	67	69	64	69
Average number of trips	3.2	4.2	2.8	2.6
Median number of trips	2	2	2	2
Fun Learning About the Country In Alberta	**Total 667=100%**	**Rodeos 271=100%**	**Fairs 288=100%**	**Farmers' Markets 108=100%**
None in past 12 months	32	26	33	43
One or more	68	74	67	57
Average number of trips	5.1	6.5	4.3	2.9
Median number of trips	2	3	2	2
Fun Learning About the Country Outside Alberta	**Total 481=100%**	**Rodeos 188=100%**	**Fairs 190=100%**	**Farmers' Markets 103=100%**
None in past 12 months	40	33	46	39
One or more	60	67	54	61
Average number of trips	3.2	4.2	2.8	2.0
Median number of trips	2	2	1	2
Country Style Events In Alberta	**Total 1087=100%**	**Rodeos 465=100%**	**Fairs 444=100%**	**Farmers' Markets 178=100%**
None in past 12 months	25	16	26	47
One or more	75	84	74	53
Average number of trips	7.8	11.5	4.7	3.0
Median number of trips	3	5	2	2
Country Style Events Outside Alberta	**Total 658=100%**	**Rodeos 295=100%**	**Fairs 257=100%**	**Farmers' Markets 106=100%**
None in past 12 months	41	34	46	47
One or more	59	66	54	53
Average number of trips	5.6	10.3	2.9	2.8
Median number of trips	2	2	2	2

With regard to having **Fun Learning About the Country**:

- Calgarians (36%) and people without informal access to rural activities (32%) were less likely than average (46%) to have taken a trip with an ag learning component.
- Farmers' market attendees had an above average likelihood of participating in this category outside the province (74% vs. 63% of all those participating) and below average participation in Alberta (78% vs. 87%).
- When they took trips like this during the last year, farmers' market attendees took fewer than the average number of trips, both in (3 vs. 5) and outside the province (2 vs. 3).
- As with the other experience categories, Canadian/international tourists that had participated were more likely to have done so out of province (94% vs. 63% on average).

Country Style Event participants showed the following patterns:

- Rodeo visitors had the greatest propensity to attend country style events in the past year, both inside and outside the province, and did so with higher frequency in Alberta than other event attendees.
- Farmers' market attendees had the lowest frequency of visiting such events in Alberta, along with some fairs, notably the Haunted Pumpkin Festival and Aggie Days.

Demographically and geographically:

- Alberta tourists (travelling 80+ km to the event – 82% vs. 70% on average) and people who lived on farms/ranches (85%) were most likely to have participated in Country Style Events at all, while Calgary and Edmonton residents (59%) and those without friends and relatives in rural areas (47%) were the least likely to have done so.
- Canadian/international visitors who had taken a Country Style Events trip in the past year were more likely than average to have had a destination out of province (94% vs. 57%) and less likely to have been in Alberta (78% vs. 94% on average).
- Edmontonians had a lower propensity to have such experiences in the last 12 months outside Alberta (40%), while Calgarians went less frequently (4.0 vs. 7.8 on average in Alberta, 2.7 vs. 6.6 outside).
- 18-24 year olds claimed to have taken a higher than average number of trips that included visiting a country style event in Alberta (15.3 vs. 7.8 on average).

Discussion

Past participation in the four ag experience categories while on a trip 80 or more kilometres away from home varied quite considerably. Most popular at all three types of events was Country Shopping, Food & Entertainment. Only Country Style Events reached the same level of participation among rodeo attendees – who also were more likely to have participated in Horse Riding on a Ranch. Farmers' market attendees were most likely to take part in Country Shopping, Food & Entertainment activities, but participated less than other event attendees in the remaining categories of ag experiences.

Nine out of ten people who had taken trips of this nature had done so in Alberta; however, their experience was hardly confined to the province, since between half and two-thirds had also been out of province – generally elsewhere in Canada. This breadth of travel involving ag experiences was echoed in the past year as well, with one-half to three-quarters of past travellers enjoying such activities in Alberta and between 40% and two-thirds doing so elsewhere.

One, perhaps unsurprising, demographic finding was that national/international tourists were most likely of all to have participated in the four experience categories in places outside Alberta.

Another, which is of greater importance strategically, is that people without access to these experiences through friends and family living in rural areas or on a farm/ranch, were less likely to have participated at all, in the past year and, when they had done so, to have done so less frequently.

Pricing

To learn more about acceptable pricing for ag experiences, respondents were asked several questions to establish:

- What they would expect to pay per day on a pleasure trip in Alberta that included experiences like the ones rated earlier. The amount was to include all expenses, such as transportation, food, accommodation, recreation and entertainment, and shopping.
- How likely they would be to take a trip like this at the expected price.
- What the maximum was that they would pay in a pre-set range of price points and the likelihood of taking the trip at that price.

The questions asked were tailored to the size of party they would travel with. However, for comparison purposes, the results are shown on a standard "per person per day" basis. The Juster Probabilistic Scale was again used to assess the chances that respondents would take such a trip. Price points were set at $50 per person per day, $100, $150 and $200.

Most Parties Will Include One Or Two People

Average party size on a trip of this nature is shown in Table 10 and was expected to be 2.3 persons, with rodeo and farmers' market attendees travelling in smaller parties and fair attendees with more people.

Table 10: Number of People Expected in Ag Trip Party

	Total 1656=100%	Rodeos 631=100%	Fairs 683=100%	Farmers' Markets 342=100%
One	28	34	22	28
Two	45	44	42	51
Three	10	6	13	9
Four	13	11	17	8
Five or more	5	4	7	3
Average Expected Party Size	**2.3**	**2.1**	**2.5**	**2.1**

*Figures may not add to 100 due to rounding

Larger party sizes were particularly associated with Aggie Days and the Haunted Pumpkin Festival (both 2.9), with respondents aged 35-44 (2.7), preschool and young families (3.3 and 3.0 respectively). Smaller party sizes were most likely to be associated with Roughstock Rodeo (1.9), FCA Finals (2.0) and Millarville Farmers' Market attendees (2.0). Smaller party sizes were found at both ends of the age spectrum: 18-24 year olds (1.9), young adult households and grown family households with the youngest child aged 18 or older (both 1.8); age groups 55-64 and 65+ (1.9 and 1.8 respectively), and older adult households (1.8).

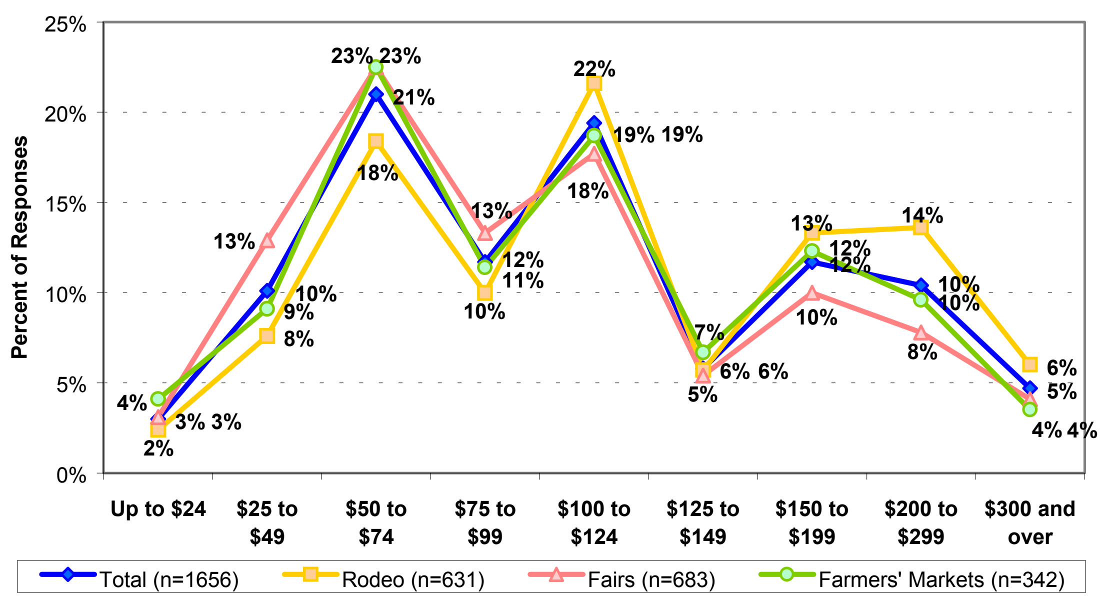
Event Attendees Expect To Pay An Average Of $113 Per Person Per Day; Over Three In Five Would Take An Ag Trip At Their Expected Cost

The distribution of responses received regarding how much respondents would expect to pay per person, ranged from $0 to $1,000 per day. The results are shown in Exhibit 10,

The most frequently mentioned estimate lay in the $50-$74 range (category mean $54), with almost as many respondents expecting to pay between $100 and $124 (category mean $101). The overall mean was $113. With an average party size of 2.3, the average expected cost per party was just over $250 per day.

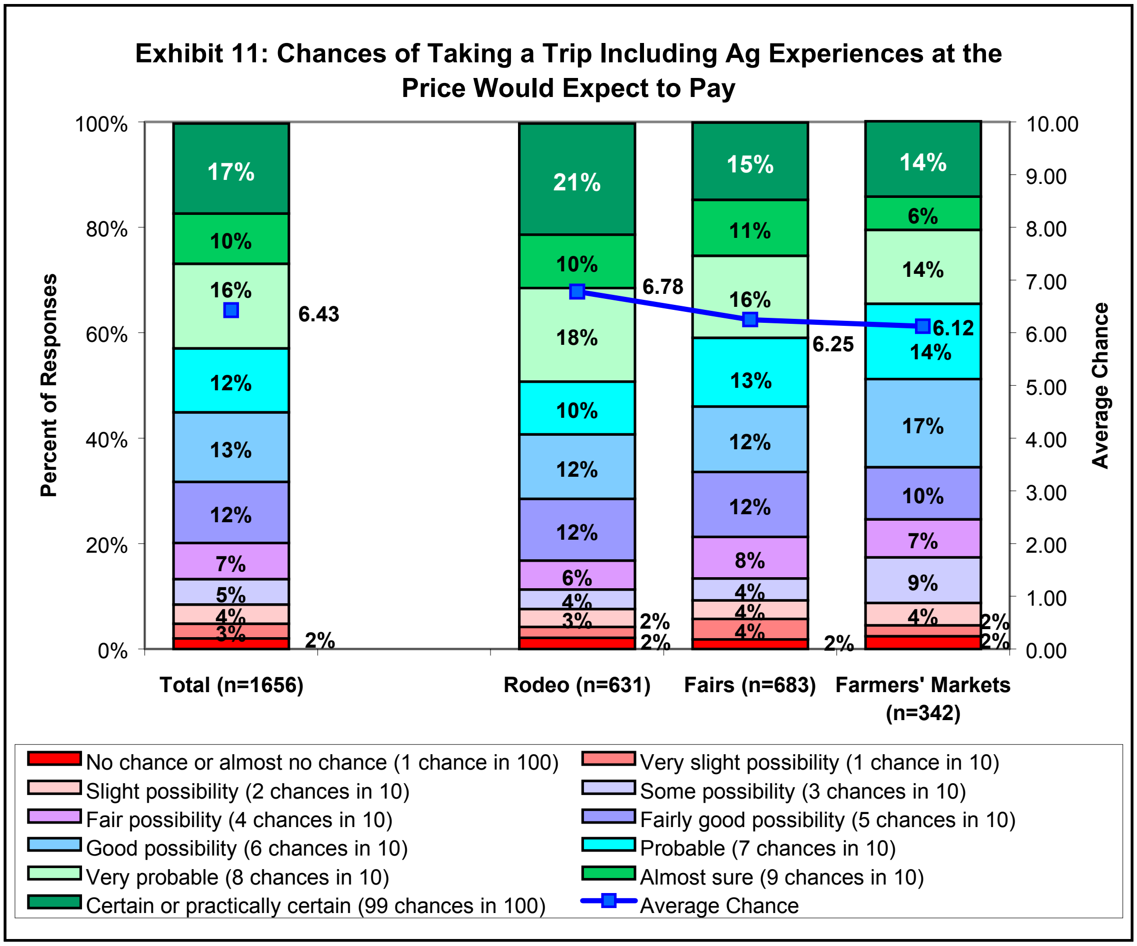
Exhibit 10 also shows that rodeo visitors expected to pay a higher amount, with a greater proportion mentioning figures of $150 and over (average $125, with CFR at $153). Fair attendees expected to pay less, with more mentioning figures below $100 (average $105, with Aggie Days at $94 and the Haunted Pumpkin Festival at $89). Farmers' market shoppers were closest to the overall pattern, with a mean of $107.

Exhibit 10: Price Would Expect to Pay Per Person Per Day on a Trip Including Ag Experiences (Spontaneous)



When asked what the chances were that they would take a trip that included ag experiences at their estimated price, the majority of responses were positive. This is shown in Exhibit 11.

One of the attributes of the Juster Scale is that the mean provides a fairly accurate estimate of likely behaviour. In a perfect world, where everyone knew about ag experiences, over three-fifths of event attendees would take an Alberta pleasure trip that included ag experiences at their estimated price (64% ±1.4%). 27% indicated that they were "certain or practically certain" or "almost sure" that they would do so. Another 28% felt that it was "probable" or "very probable". Very few were outright unenthusiastic about the prospect.

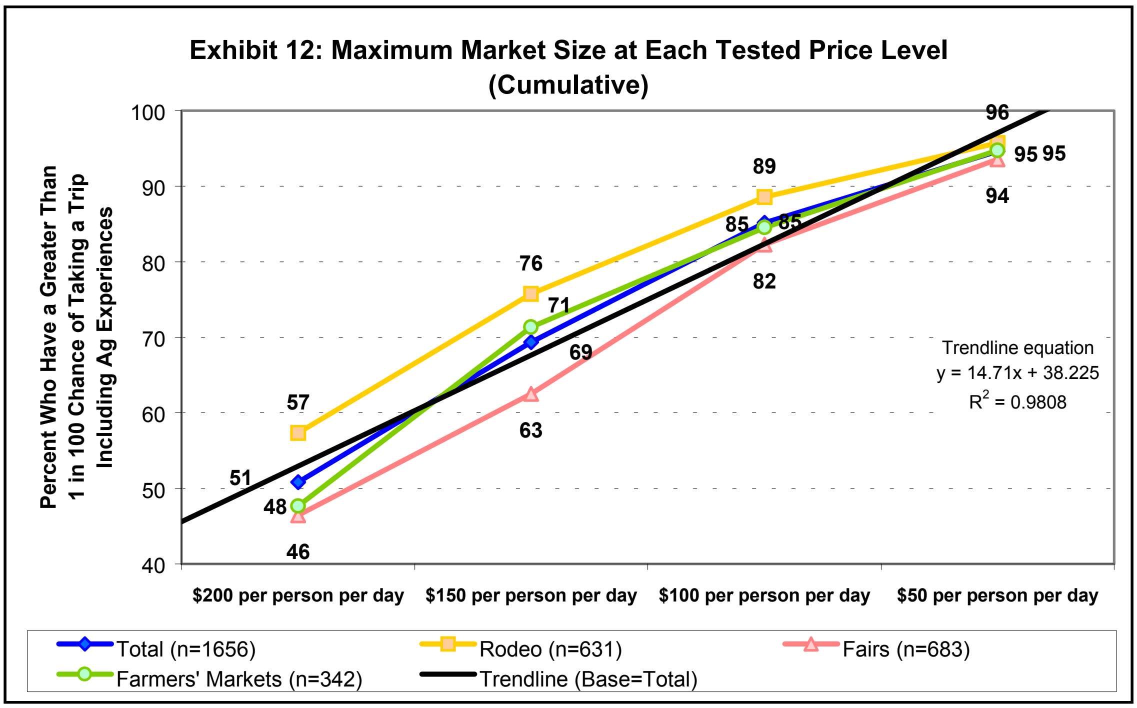


It is noteworthy that the average chance of taking a trip at the estimated price did not vary significantly from one expected price category to another (e.g., 67% would take a trip including ag activities at up to $24 per day, 67% at $100-$124 and 67% at $200-$299). In other words, as long as the price was within the individual's comfort zone, the level of interest expressed was quite similar.

Chance Of Purchase Increased With Decreasing Price Levels

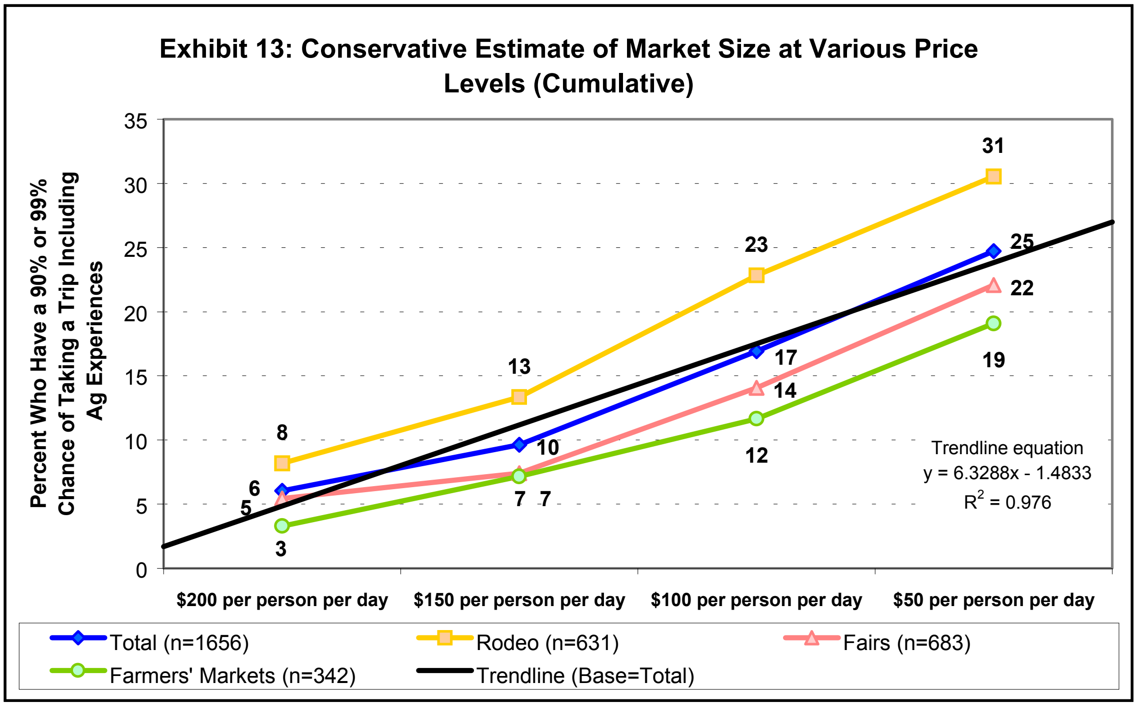
The picture was quite different once higher than expected price points were considered. If, for example, the expected price was $100 per day and the chance of going on such a trip greater than 1 in 100, the respondent was asked what the chances were that they would take the trip for $150 per day, and then, for $200. (Questioning flowed in reverse if the reported chance at the expected price was 1 in 100. Interest at lower price points, down to $50 was then investigated.)

Exhibit 12 shows what the maximum size of the event attendee market would be at each price point. Overall, 51% of event attendees would take a pleasure trip that includes ag activities at a cost of $200 per person per day. 71% would take such a trip at $150, 85% at $100 and 96% at $50. Since the relationship was clearly a linear one (increasing chance with decreasing price), a trendline has been plotted on the graph which almost perfectly reflects the values actually received (correlation coefficient of R^2 = .98). The equation may be used to estimate maximum market size (assuming that all event attendees are aware of the types of experiences that are available) for any price point in the tested range.



The maximum market size shown above includes everyone reporting a chance greater than 1 in 100 of taking a trip that includes ag experiences. A more conservative view of market size at the different price levels is shown in Exhibit 13, which includes only those respondents with a high level of certainty (chance of 90% or higher) of taking such a trip.

The conservative range would be from 25% at $50 per person per day, down to 6% at $200.

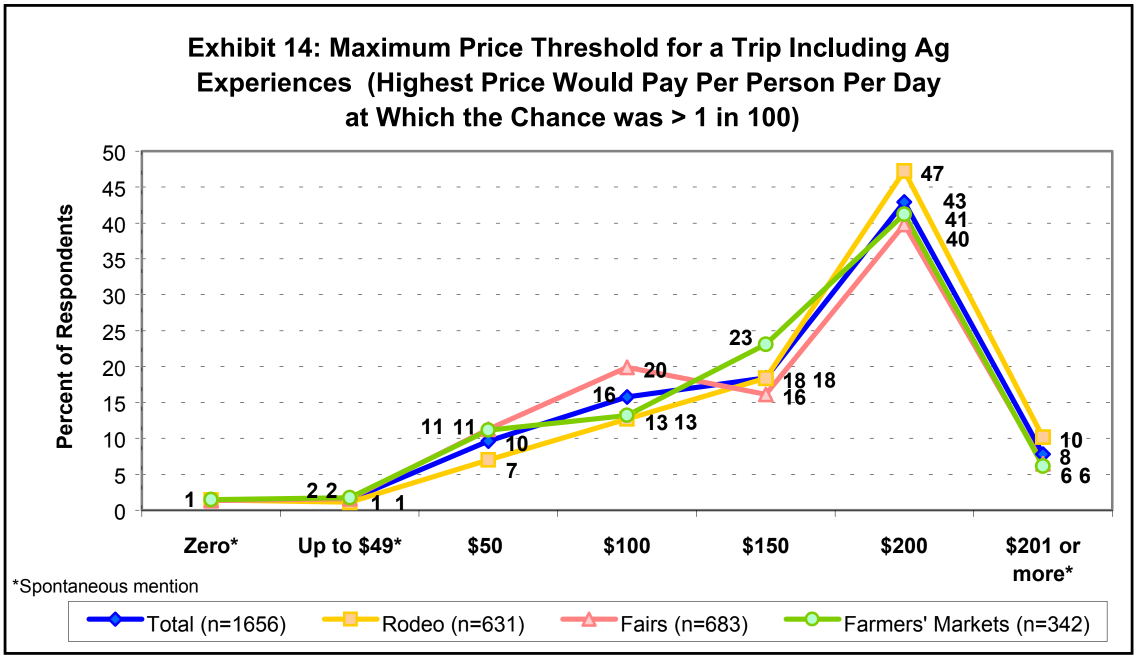


AVERAGE MAXIMUM PRICE WOULD PAY IS $150, BUT CHANCES WOULD DROP TO TWO IN FIVE

Looking at the data in a different way, the maximum price in the pre-set range that people might be willing to pay (i.e., with a chance greater than 1 in 100) can be identified. The results are shown in Exhibit 14 and suggest that:

- Few ag event attendees saw their maximum price at under $49. Almost all who originally expected the trip to cost under $49 per person day, continued to indicate some level of willingness to pay more, even if the chance of taking the trip dropped;
- 45% were prepared to spend a maximum of between $50 and $150;
- a similar proportion (43%) indicated some chance of taking the trip at the highest price presented, $200;
- the final group of 8% were individuals who had expected to pay more than $200 and were willing to do so; they should be added to the $200 level, bringing it to half of all respondents (51%);
- Rodeo fans remained slightly above average, with 57% indicating interest at or above $200.

The mean maximum price was $150 and the median $200, up from the expected average of $113 and median of $100. Rodeo attendees' average maximum price was highest at $159 ($166 at CFR, $168 at FCA Finals), compared to farmers' market visitors at $149 and fair goers at $143 (Aggie Days $137).



Since it has been established that the chance of taking a trip at successively higher price levels declines, Exhibit 15 looks at the chances of going on an ag trip at the maximum price level. In comparison to the distribution in Exhibit 11, which showed interest at the expected price, chances of taking an ag trip dropped notably at the maximum price, with far fewer giving ratings from 5 to 10 (fairly good possibility or better) and many more providing ratings of 1, 2 and 3 (slight possibility or less).

The average fell to 3.91, or 39% willing to take an ag trip at the maximum price they would pay in the $50-$200 range (down from 64% at the expected price level) . Rodeo attendees, especially those at CFR (45%) and FCA Finals (46%), were not only willing to pay a higher maximum price, but their level of interest at that price was higher than that of attendees at the other types of events as well.

So what were the chances that people would take the trip at their maximum price threshold? Exhibit 16 shows the results. As one might have anticipated, chances were higher at the lower price levels – 45% with a maximum price tolerance of $50 would go, 34% at $100 and 25% at $150. However, chances then rose substantially at the high end – 44% at the $200 level and 67% for those whose expected price was higher than that – giving a blended rate at $200 of 48%. The change in direction was influenced by those with both high enthusiasm and a willingness to pay at a higher than average level – notably rodeo enthusiasts.

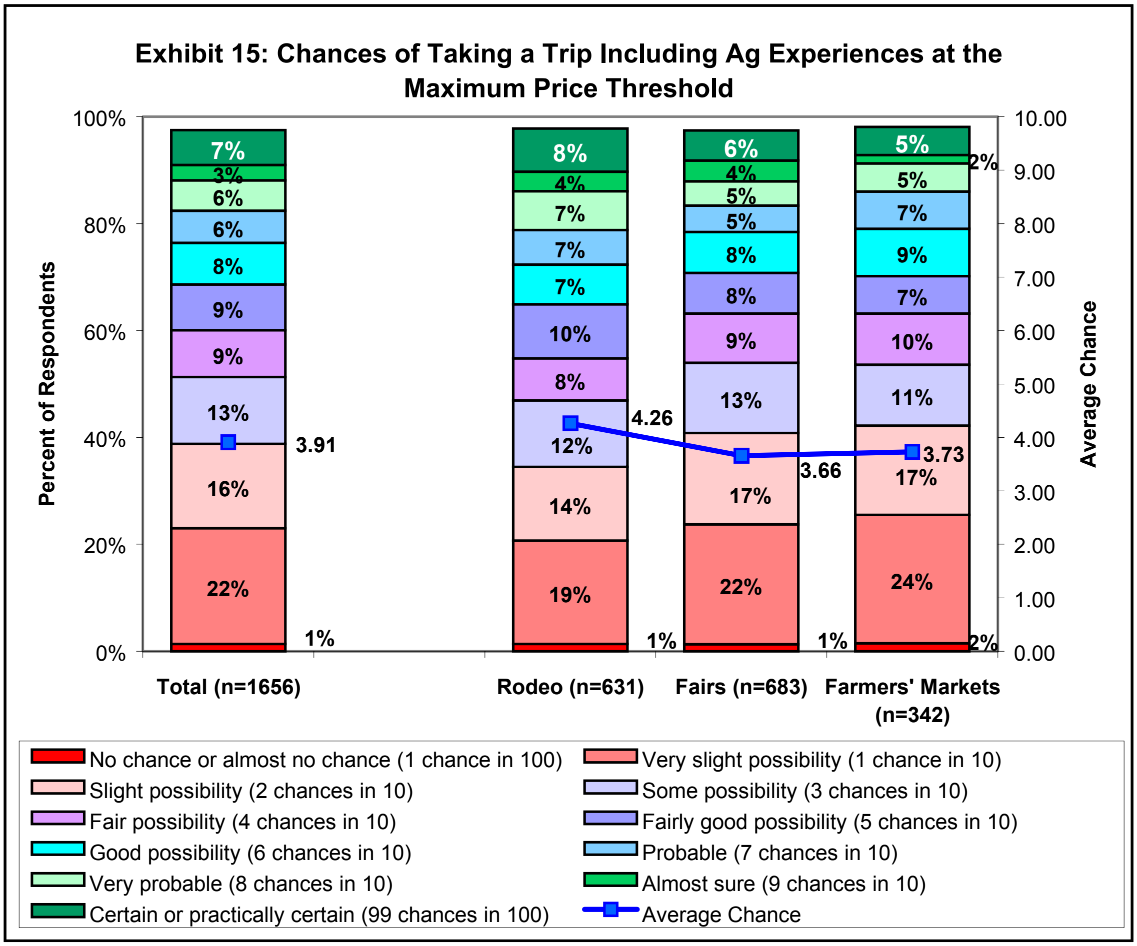


Exhibit 15: Chances of Taking a Trip Including Ag Experiences at the Maximum Price Threshold
Percent of Respondents
Average Chance
Total (n=1656)
Rodeo (n=631)
Fairs (n=683)
Farmers' Markets (n=342)
3.91
4.26
3.66
3.73
No chance or almost no chance (1 chance in 100)
Very slight possibility (1 chance in 10)
Slight possibility (2 chances in 10)
Some possibility (3 chances in 10)
Fair possibility (4 chances in 10)
Fairly good possibility (5 chances in 10)
Good possibility (6 chances in 10)
Probable (7 chances in 10)
Very probable (8 chances in 10)
Almost sure (9 chances in 10)
Certain or practically certain (99 chances in 100)
Average Chance

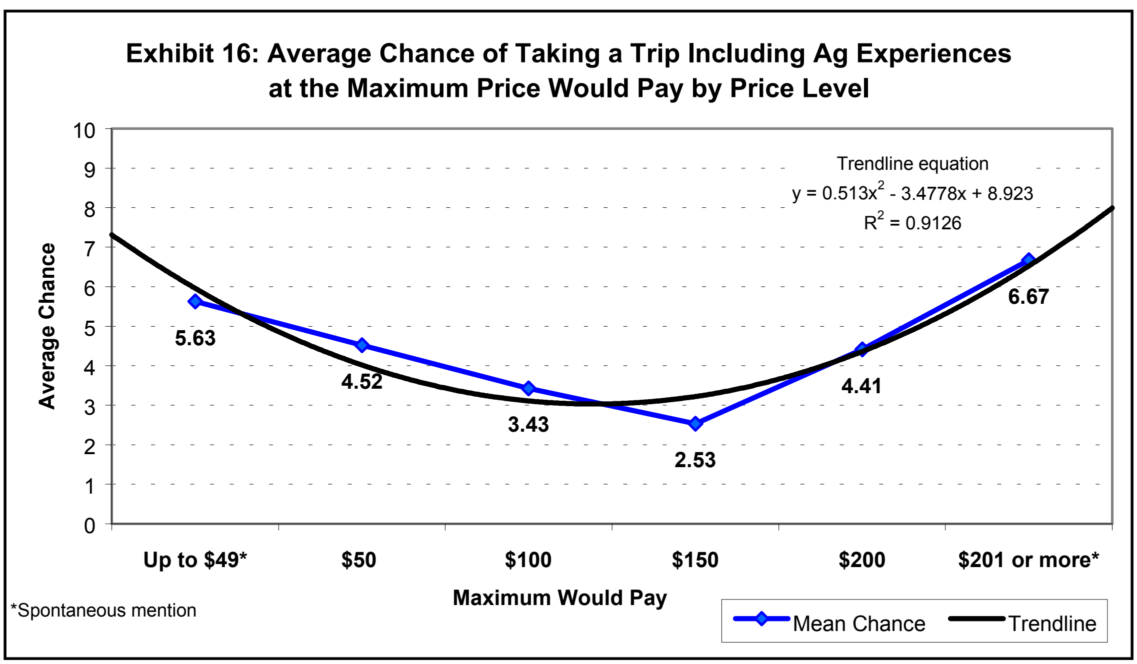


Exhibit 16: Average Chance of Taking a Trip Including Ag Experiences at the Maximum Price Would Pay by Price Level
Trendline equation
y = 0.513x2 - 3.4778x + 8.923
R2 = 0.9126
Average Chance
5.63
4.52
3.43
2.53
4.41
6.67
Up to $49*
$50
$100
$150
$200
$201 or more*
Maximum Would Pay
*Spontaneous mention
Mean Chance
Trendline

Youth And Affluence Influence Higher Chances Of Going, At A Higher Price; Older Groups And Preschool Families Would Pay Less

Some differences between geographic and demographic groups were consistent across all measures, some occurred for only one pricing aspect.

- Those who expected to spend more per day than average included: event attendees who lived on a farm/ranch ($132 vs. $113); 18-24 year olds ($137) living in young adult households ($133); and households with an income greater than $120,000 in 2003 ($129).
- People without informal rural connections had lower interest in an ag trip at their expected level of cost (59% vs. 64%). This was also true for the oldest age cohort (65+, 57%). An above average interest at the expected price was expressed in the most affluent households ($120,000, 69%).
- People who indicated they would pay a higher than average maximum price for ag experiences were: Alberta tourists ($160 vs. $150); 18-24 year olds ($167), young adult households ($170) and the highest income group ($164). The maximum was significantly lower among 65+ year olds ($134) and preschool families ($130).

Discussion

The strongest predictors of interest in and willingness to pay, appear to be associated with household life stage and type of event attended – which is also linked to life stage. Higher prices and higher chances of taking a pleasure trip in Alberta which includes ag experiences, were expected by rodeo attendees, 18-24 year olds, young adult households and people with rural links. Lower interest and lower chances of going on such a trip were stated by older age groups, particularly 65+ years and older adult households. A lower price threshold was evident for preschool families and fair goers.

The only other influencing demographic indicator was income, and then only at the very highest end ($120,000+), where there was both higher than average propensity and an interest at higher price levels.

On average, event attendees expect to pay $113 per person per day for such a trip (median $100). About three in five would go at their expected price. The average maximum price they would be prepared to pay was $150 (median $200), but the chances of travel at the maximum price dropped to two in five respondents. Actual market size will be directly related to price, as well as other influencing variables, such as knowledge of ag experiences.

Product And Packaging Attributes

In this section preferred product and packaging attributes are presented and discussed. The data was derived from a conjoint analysis.

Nine attributes were chosen for examination, each of which included at least two attribute "levels". The list was as follows:

Type of Experience:
- Ranch-based horse riding experiences
- Have fun learning about the country
- Attending country style events
- Country shopping, food and entertainment

Type of Trip:
- Travel to one location, enjoying things to do nearby
- Travel to different places in a region, stopping along the way

Activity Level:

Variety of Activities:
- Enjoy a variety of different experiences
- Enjoy one or two major experiences

Intensity of Activities:
- Keep busy and on the go
- Relax and take it easy

Choose and Arrange Where to Go, What to Do, Where to Stay:
- In advance
- While on your trip

Trip Length & Accommodation:
- Day trip
- Weekend getaway staying in country style accommodation e.g., ranch, cabin, country inn, farmhouse
- Weekend getaway staying at a hotel or motel
- Weekend getaway staying at a campground

Travel Time from Home:
- 1 to 3 hours
- Longer than 3 hours

Suitability:

Suitability for Children:
- Suitable for families with children
- Adult-oriented

Travel Companions:
- Something to do when you have visiting friends or relatives
- Somewhere to go with the people you normally travel with

The result for the entire sample, based on "discriminating" individuals (i.e., people for whom utility scores could be calculated – who did not give equal scores to all 16 cards and did not refuse to answer the question) is shown in Exhibit 17. Two sets of information are provided:

EXHIBIT 17: SUBFILE SUMMARY - TOTAL RESPONDENTS (INDIVIDUALLY CALCULATED)

Averaged Importance	Utility	Factor	
		EXPERNCE	Type of Experience:
32.29	-.6436		Horse riding
	-.1208		Fun learning
	.3191		Country style events
	.4453		Shopping + food + entertainment
		TYPE	Type of Trip:
6.51	.0186		1 location + things nearby
	-.0186		Regional travel
		ACTIVITY	Variety of Activities:
6.55	.0201		Variety experiences
	-.0201		1-2 major experience
		ACTIVTY2	Activity Level:
6.44	.0092		Busy, on the go
	-.0092		Relax, take it easy
		ARRANGE	Choose and Arrange Where to Go, What to Do, Where to Stay:
6.41	-.0306		In advance
	.0306		While on your trip
		LENGTH	Trip Length & Accommodation:
20.14	.2259		Day trip
	.0070		W/E country accommodation
	-.0916		W/E hotel or motel
	-.1413		W/E campground
		DISTANCE	Travel Time from Home:
6.88	.0264		1-3 hours
	-.0264		Longer than 3 hours
		CHILN	Suitability for Children:
7.99	.0414		Families with children
	-.0414		Adult-oriented
		PARTY	Travel Companions:
6.79	-.0743		Do with VFR
	.0743		Go with usual companions
	5.4001	CONSTANT	

Pearson's R = .991 Significance = .0000

Kendall's tau = .950 Significance = .0000
Kendall's tau = 1.000 for 2 holdouts Significance = .

- Utility scores, also known as part-worth utility scores, are listed, along with a graph of those scores under the heading "factor". *All scores within an attribute add to 0, so some will be positive (meaning higher preference) and some will be negative (meaning lower preference, not "rejected").* The value of the scores can be compared within an attribute but not between attributes. In other words, there is greater preference for trips suitable for families with children than for adult-oriented trips, but one cannot say there is greater preference for family trips than for a trip where one stays in one location and takes excursions from there.
- Only the distances between attribute level scores are comparable, and the absolute difference between the highest and lowest level of an attribute is used to calculate the importance of the attribute. A greater spread in the utility scores means higher importance. This is shown in the bar graph under the heading 'averaged importance'. Now one can observe that the attribute 'suitability for children' is slightly more important (counts for 8.0% of importance in making a choice between trips) than the 'type of trip' (6.5% importance).

The utility scores may be added to create new scenarios. One level from each attribute should be selected and the sum will indicate the preference for that "product" or combination of attributes. Sums for different scenarios can then be produced and compared – the higher the total value, the greater the preference for the scenario.

The scores become meaningful only when compared or used as described; the numbers themselves have little intrinsic value.

Results here are shown for all respondents calculated on an individual basis. In other words, utility scores like this have been prepared for each respondent and then averaged across the sample. Results for different sub-groups, similarly calculated, are included in the tabulations.

Type of Experience Is The Most Important Product Attribute, Followed By Trip Length & Accommodation

From Exhibit 17, it may be seen that the most important trip attribute is the type of experience, followed by trip length/type of accommodation used. Together they account for over 50% of the considerations exercised in choosing one trip over another. The remaining 7 aspects of the trip have similar, relatively low, importance for event attendees as a group.

Exhibits 18a – c show the same data by type of event attended.

Importance values were roughly the same for rodeo, fair and farmers' market visitors, as they were across most other demographic and geographic sub-groups. Even where there were statistically significant differences, the importance scores were not materially different.

However, at the attribute level, there were meaningful differences between the utility scores of various sub-groups.

EXHIBIT 18A: EVENT SUBFILE SUMMARY - RODEO (INDIVIDUALLY CALCULATED)

Averaged Importance	Utility	Factor	
		EXPERNCE	Type of Experience:
31.37	-.1853		Horse riding
	-.3612		Fun learning
	.4310		Country style events
	.1155		Shopping + food + entertainment
		TYPE	Type of Trip:
6.68	.0067		1 location + things nearby
	-.0067		Regional travel
		ACTIVITY	Variety of Activities:
6.82	.0509		Variety experiences
	-.0509		1-2 major experience
		ACTIVTY2	Activity Level:
6.80	.0007		Busy, on the go
	-.0007		Relax, take it easy
		ARRANGE	Choose and Arrange Where to Go, What to Do, Where to Stay:
6.67	-.0337		In advance
	.0337		While on your trip
		LENGTH	Trip Length & Accommodation:
19.54	.1585		Day trip
	.0380		W/E country accommodation
	-.1001		W/E hotel or motel
	-.0964		W/E campground
		DISTANCE	Travel Time from Home:
7.18	.0050		1-3 hours
	-.0050		Longer than 3 hours
		CHILN	Suitability for Children:
7.88	-.0005		Families with children
	.0005		Adult-oriented
		PARTY	Travel Companions:
7.05	-.0614		Do with VFR
	.0614		Go with usual companions
	5.8054	CONSTANT	

Pearson's R = .992 Significance = .0000

Kendall's tau = .933 Significance = .0000

Kendall's tau = 1.000 for 2 holdouts Significance = .

EXHIBIT 18B: EVENT SUBFILE SUMMARY - FAIRS (INDIVIDUALLY CALCULATED)

Averaged Importance	Utility	Factor	
		EXPERNCE	Type of Experience:
31.64	-.8142		Horse riding
	.0471		Fun learning
	.3779		Country style events
	.3893		Shopping + food + entertainment
		TYPE	Type of Trip:
6.40	.0160		1 location + things nearby
	-.0160		Regional travel
		ACTIVITY	Variety of Activities:
6.37	-.0103		Variety experiences
	.0103		1-2 major experience
		ACTIVTY2	Activity Level:
6.37	.0067		Busy, on the go
	-.0067		Relax, take it easy
		ARRANGE	Choose and Arrange Where to Go, What to Do, Where to Stay:
6.37	-.0234		In advance
	.0234		While on your trip
		LENGTH	Trip Length & Accommodation:
21.09	.2437		Day trip
	-.0433		W/E country accommodation
	-.0825		W/E hotel or motel
	-.1179		W/E campground
		DISTANCE	Travel Time from Home:
6.61	.0377		1-3 hours
	-.0377		Longer than 3 hours
		CHILN	Suitability for Children:
8.56	.0880		Families with children
	-.0880		Adult-oriented
		PARTY	Travel Companions:
6.59	-.0711		Do with VFR
	.0711		Go with usual companions
	5.3474	CONSTANT	

Pearson's R = .988 Significance = .0000

Kendall's tau = .883 Significance = .0000
Kendall's tau = 1.000 for 2 holdouts Significance = .

EXHIBIT 18C: EVENT SUBFILE SUMMARY - FARMERS' MARKETS (INDIVIDUALLY CALCULATED)

Averaged Importance	Utility	Factor	
		EXPERNCE	Type of Experience:
35.25	-1.1517		Horse riding
	-.0100		Fun learning
	-.0047		Country style events
	1.1665		Shopping + food + entertainment
		TYPE	Type of Trip:
6.42	.0460		1 location + things nearby
	-.0460		Regional travel
		ACTIVITY	Variety of Activities:
6.41	.0233		Variety experiences
	-.0233		1-2 major experience
		ACTIVTY2	Activity Level:
5.94	.0297		Busy, on the go
	-.0297		Relax, take it easy
		ARRANGE	Choose and Arrange Where to Go, What to Do, Where to Stay:
6.03	-.0392		In advance
	.0392		While on your trip
		LENGTH	Trip Length & Accommodation:
19.35	.3150		Day trip
	.0498		W/E country accommodation
	-.0941		W/E hotel or motel
	-.2706		W/E campground
		DISTANCE	Travel Time from Home:
6.87	.0434		1-3 hours
	-.0434		Longer than 3 hours
		CHILN	Suitability for Children:
7.06	.0259		Families with children
	-.0259		Adult-oriented
		PARTY	Travel Companions:
6.67	-.1047		Do with VFR
	.1047		Go with usual companions
	4.7555	CONSTANT	

Pearson's R = .996 Significance = .0000

Kendall's tau = .983 Significance = .0000
Kendall's tau = 1.000 for 2 holdouts Significance = .

Preference For Different Attribute Levels Sometimes Varied By Type Of Event, Demographic And Geographic Groups

People at Different Types of Events Had Varying Preferences Among The Four Experience Categories

Type of experience accounted for 32% of importance overall; it was more important than average to farmers' market attendees (36%) and less important to CFR visitors (27%).

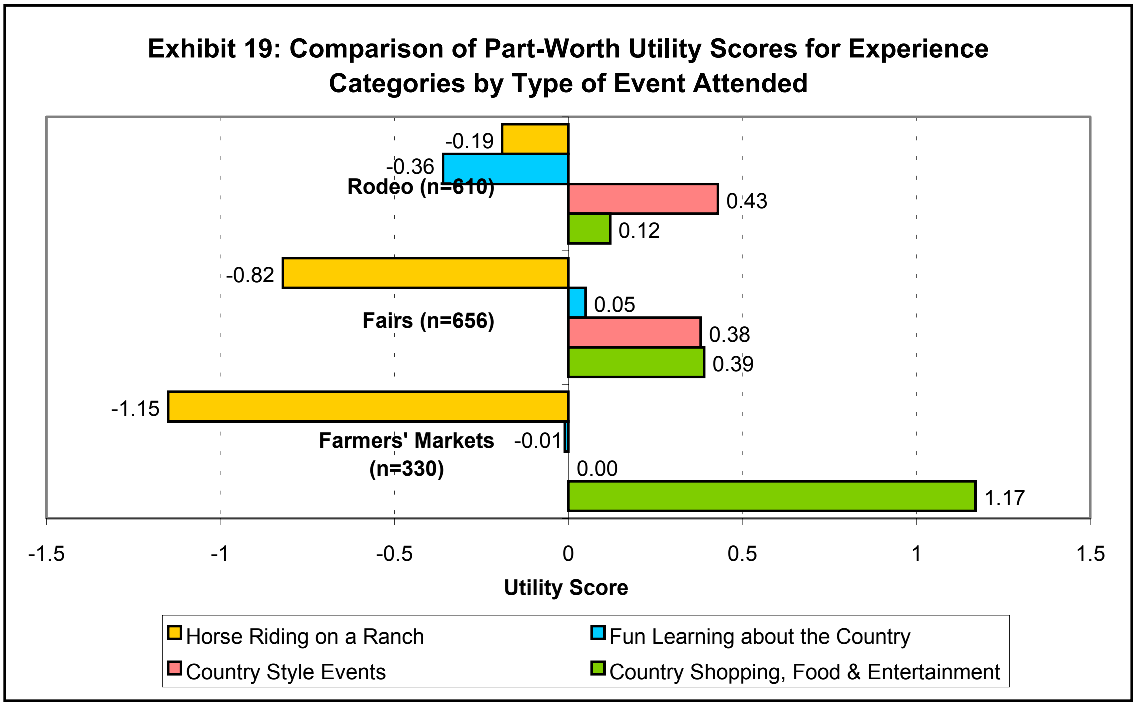
Overall preference order for the experience categories varied by the type of event attended, as may be seen in Table 11. The scale of the differences is shown in Exhibit 19.

Table 11: Preference Order for Experience Categories by Type of Event Attended

	Rodeo Attendees (n=610)	Fair Attendees (n=656)	Farmers' Market Visitors (n=330)
1st Choice	Country Style Events	Country Shopping, Food & Entertainment	Country Shopping, Food & Entertainment
2nd Choice	Country Shopping, Food & Entertainment	Country Style Events	Country Style Events
3rd Choice	Horse Riding on a Ranch	Fun Learning About the Country	Fun Learning About the Country
4th Choice	Fun Learning About the Country	Horse Riding on a Ranch	Horse Riding on a Ranch

Looking at Exhibit 19, notable differences in utility scores by type of event may be observed as follows.

- Among rodeo fans, Country Style Events had the highest utility score, though this was not significantly different to the overall average. However, rodeo attendees did have a greater interest in Horse Riding on a Ranch and lower interest in Country Shopping, Food & Entertainment and Fun Learning About the Country. Visitors to the two stand-alone rodeos and the Roughstock Rodeo were more interested in ranch-based horse riding. Both the large urban and the stand-alone rodeos were less interested in Country Shopping, Food & Entertainment.
- The fair attendee scores were not significantly different to the average, though Farmfair and Ag Expo visitors showed greater preference for Country Style Events. Ag Expo visitors were also more interested in Fun Learning About the Country, but less in ranch-based horse-riding.
- Farmers' market shoppers had the most extreme preferences of all. The only experience generating a positive score was Country Shopping, Food & Entertainment (their own category), while Horse Riding on a Ranch lay at quite the opposite end of their preference spectrum.

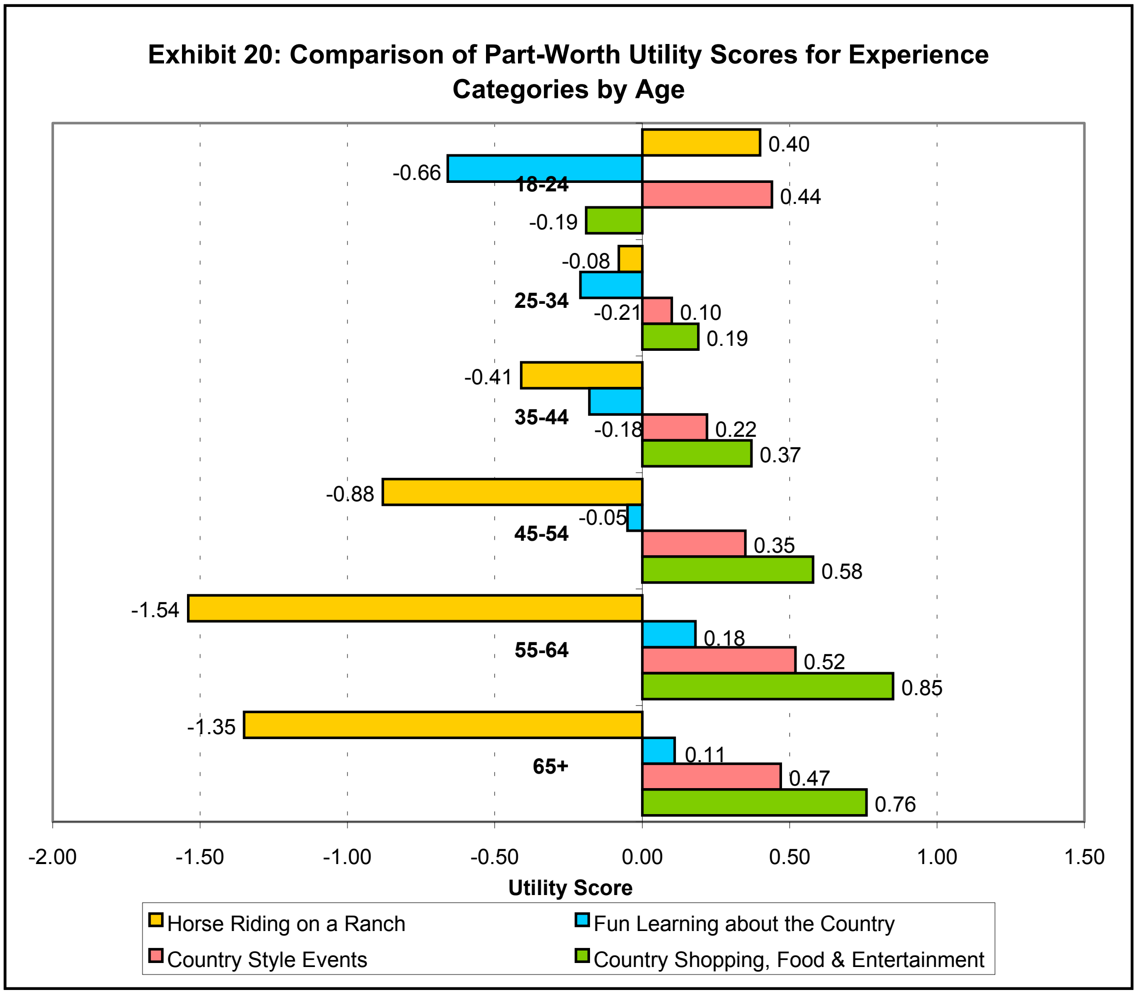


Differences by age were also significant (see Exhibit 20). These corresponded to some degree with household life stage.

- The youngest age group and people living in young adult households were much more favourable in their ratings of Horse Riding on a Ranch than any other group. They were least well disposed toward Fun Learning About the Country and less likely than average to feel they would go for a Country Shopping, Food & Entertainment experience.
- At the other end of the age range, people aged 55-64 and 65+ and those living in older adult households were far less interested in Horse Riding on a Ranch than other groups. However their ratings of Country Shopping, Food & Entertainment in particular, and Fun Learning About the Country were more positive than average.
- In the 25-34 age group Country Style Events and Country Shopping, Food & Entertainment were rated less positively than average as a trip experience.

Other differences of note regarding type of experience preferences were that:

- Men rated Country Style Events more favourably than women (.42 vs. .22) and women rated Country Shopping, Food & Entertainment higher than men (.61 vs. .28);
- Country Style Events received higher scores from Alberta tourists (.68), people living on farms or ranches (.77) and in a town or rural area (.44). They were rated less positively as an activity by local, Calgary and Edmonton residents (.15, .12, .00 respectively) and by people without friends or family to visit in rural areas (-.08 vs. .42 by those with access);
- Country Shopping, Food & Entertainment was of lower than average interest to farmers/ranchers (.14).



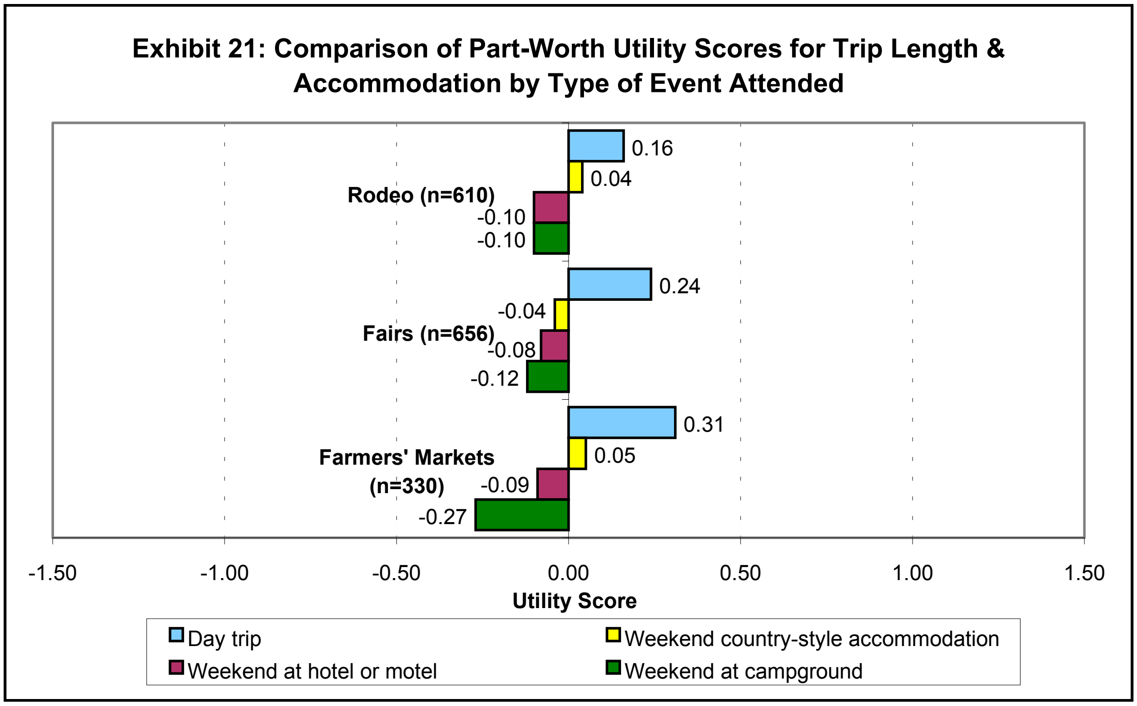
Day Trips Were Generally Preferred

Trip length and type of accommodation accounted for 20% of importance overall; there were no significant differences in this score by sub-group.

Within the category, the preference order overall and, with one exception, the preference order by type of event attended (see Exhibit 21), was:

- Day trip
- Weekend getaway staying in country style accommodation e.g., ranch, cabin, country inn, farmhouse
- Weekend getaway staying at a hotel or motel
- Weekend getaway staying at a campground

Among rodeo fans, the utility score for a campground was very slightly higher than for a hotel or motel. More detail is depicted in Exhibit 21, which also shows that there was less extreme preference here than for the experience categories.



There were few systematic sub-group differences of significance. Those that were noted included:

- Greater interest in day trips among Millarville Farmers' Market visitors (.43), among 55-64 year olds (.46) and people living in older adult households (.36); lower interest in the 18-24 years age group (.02);
- Higher ratings of country style accommodation in Edmonton (.18) and lower than average preference for this among Ag Expo visitors (-.23);
- Less favourable views of hotel/motel accommodation among FCA Finals attendees (-.30).

The Need For Child-Centred Experiences Depended On Life Stage

The next most important attribute was suitability for children, at 8%. Not surprisingly, this factor is tied to family life stage, with preschool families rating it more important (11%) and older adult households less important (7%) than average. Canadian and international tourists also viewed it as being of lower importance (6%).

In terms of sub-group differences, as reflected by utility scores for the two attribute levels:

- Attendees at all three types of events rated a trip suitable for families with children higher than an adult-oriented trip.

- Actual utility scores were higher among fair goers (.09 vs. .04 overall), but not significantly so; however, Aggie Days attendees were significantly more likely to prefer a family trip (.23).
- Utility scores for child-friendly trips were higher among 25-34 (.19) and 35-44 year olds (.13) and among both preschool (.36) and young families (.21).
- Adult-oriented trips were preferred by young adult households (.16 vs. -.04 overall), older adult households (.10) and in the 65+ age group (.16).

Shorter Travel Time From Home Was Preferred

This attribute reflected distance, with at least one hour of driving time to the destination being needed to ensure that the trip qualified as "tourism", i.e., was 80 km or more away. With the benefit of hindsight, there is a possibility that the actual description presented to respondents (Travel Time From Home: 1-3 Hours vs. Longer than 3 Hours) may not have been interpreted as reflecting distance, but as trip duration.

This factor accounted for 7% of the importance in choosing a combination of trip attributes and a shorter travel time was preferred overall. No significant differences either in importance or in utility scores for the two attribute levels were registered between sub-groups.

Ag Trips Would Be Taken With One's Usual Travel Companions

The people one travels with made up the next most important dimension at 7%. CFR attendees rated it more important than average (8%).

The general preference is to take a trip that offers somewhere to go with the people one normally travels with. Older adult households were particularly likely to make this choice (.13 vs. .07 on average).

Only Calgarians showed a significantly higher preference for the other alternative, "something to do when you have visiting friends or relatives" (-.01 vs. -.07 overall).

Doing A Variety Of Activities Had Most Appeal

Next in importance, at 7%, was the variety of activities preferred on an ag trip.

Overall preference was for enjoying a variety of different experiences rather than one or two major experiences. Variety was significantly more important to CFR and FCA Finals attendees (.11 and .15 respectively, vs. .02 for the total population), while those visiting Ag Expo expressed greater interest in a limited number of activities (.10 vs. -.02 overall).

Preference Was For Travelling To One Location And Enjoying Things Nearby

Also at 7% importance was the type of trip offered. Slightly greater preference was expressed for travelling to one location and doing things nearby as opposed to travelling to different places in a region, stopping along the way. There were no significant inter-group differences on this attribute.

Event Attendees Prefer To Keep Busy And On The Go

At 6% importance, intensity of activities was one of the least important factors contributing to a decision about ag trip preferences. Keeping busy and on the go was slightly preferred to relaxing and taking it easy. The only significant reversal on this preference occurred for people who live on a farm or ranch, who preferred to relax and take it easy (.05 vs. -.01 overall).

Arrangements Should Be Made On The Trip

The last of the nine attributes, "Choose and Arrange Where to Go, What to Do, Where to Stay" also contributed to trip decisions by 6%.

Preference was generally expressed for making arrangements while on the trip, rather than in advance. There were no significant differences between the sub-groups examined in this study.

Some Sub-Groups Wanted Specific Combinations Of Attribute Levels That Differed From Overall Preferences

The above analysis looked at preferences within each component of a travel "product". Information on preferred combinations of trip attributes has been obtained by profiling the preferences of those preferring one attribute level against the utility scores for the other attributes. Respondents were classified according to their most preferred of the two or four attribute levels (i.e., the one which achieved the highest utility score from the respondent).

For the four **experience categories**, inclination toward the other attributes tested showed the following statistically significant patterns:

- Ranch-based horse riding enthusiasts wanted a weekend getaway staying in country-style accommodation (.20 vs. .01 overall). They provided low ratings for a day trip (.06 vs. .23 overall).
- Those who preferred Country Style Events were less enthused than average about using country style accommodation (-.17 vs. .01) – possibly related to the fact that many live that way.
- There were no significant attribute linkages among people who most preferred the other experience categories.

Similarly, looking at ***trip length and accommodation options***, the following associations were found:

- People who prefer a day trip were more likely to favour doing one or two major activities (.06 vs. -.02 on average).
- Those choosing a weekend in country-style accommodation were more positively predisposed to ranch-based horse riding (-.32 vs. -.65) and less so to Country Style Events (.10 vs. .32). Country-style accommodation was also associated with travelling to one location and doing things nearby (.09 vs. .02) and with enjoying a variety of different experiences on the trip (.10 vs. .02).
- Preferred accommodation in a hotel or motel was allied with high utility scores for Country Style Events (.52 vs. .32) and a lower than average score for Horse Riding on a Ranch (-1.02 vs. -.65).
- There were no significant differences among those preferring campground accommodation.

Nevertheless, other attributes were linked to campground preference:

- Respondents who favoured adult-oriented trips were better disposed to staying in a campground than those who were looking for family trips (-.06 vs. -.23);
- Camping was regarded more favourably by people who wanted to travel to different places in a region, stopping along the way, than among those who preferred a single location (.02 vs. -.29);
- People who preferred to do one or two major activities rather than a variety of activities on a trip indicated higher interest in staying in a campground (-.06 vs. -.22);
- Making arrangements in advance was linked to higher scores for camping than making arrangements along the way (-.05 vs. -.22); and
- Preference for shorter travel time was allied with higher scores for campground accommodation than preference for longer distances (-.05 vs. -.24).

Who one travels with also proved to be associated with, or a predictor of, other desirable trip features:

- People who rated the appeal of an ag experience with visiting friends and relatives (VFR) highly:
  - preferred a trip involving 1-3 hours of travel from home (.08 vs. -.01 for those choosing a trip with their normal travel companions); and
  - were more favourably inclined to Horse Riding on a Ranch (-.48 vs. -.77).

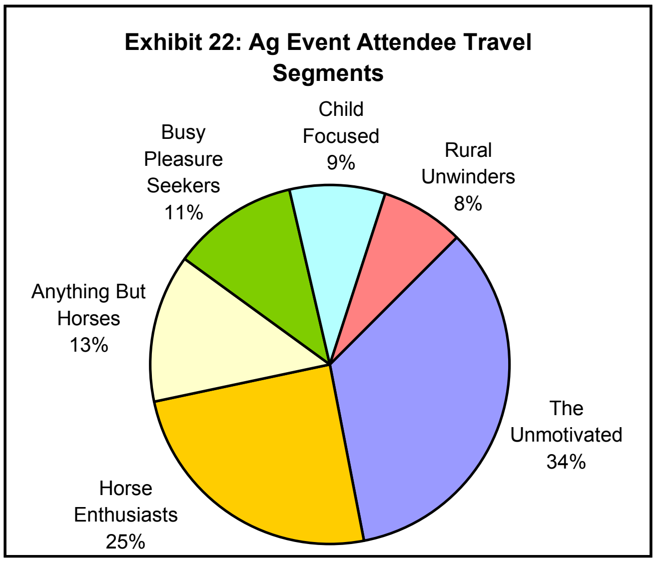
- On the other hand, travel with one's usual companions was:
  - more likely to involve Country Shopping, Food & Entertainment (.57 vs. .29), and a trip with a variety of different experiences (.06 vs. -.02); and
  - less likely to involve Horse Riding on a Ranch (-.77 vs. -.48).

- Furthermore, having one or two major experiences was linked to travel with visiting friends and relatives, rather than travel with one's normal party (-.02 vs. -.13).

In addition to preference for a longer, 3+ hour, trip with one's normal companions (.01 vs. -.08 for VFR), longer **travel time** was also associated with a day trip (.30 vs. .14 for shorter time).

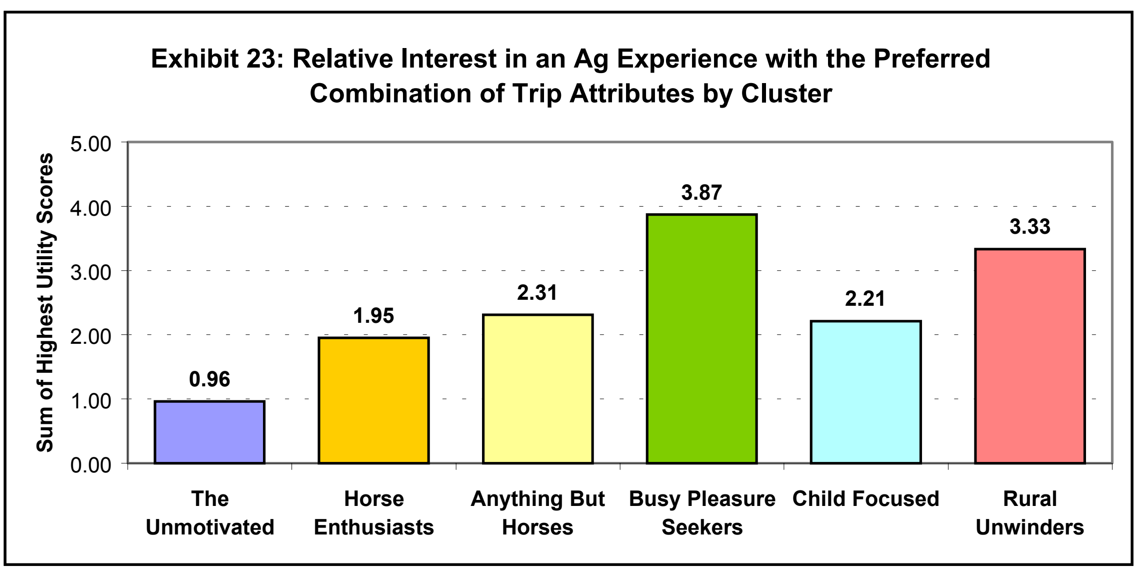
EVENT ATTENDEES FELL INTO SIX GROUPS WITH DISTINCTLY DIFFERENT NEEDS

The analysis to this point leaves one important question unanswered. What proportion of the population of event attendees favour different types of travel involving ag experiences? To answer the question, a cluster analysis was prepared and the six cluster solution chosen for its interpretability, cluster size distribution and representation of key themes.

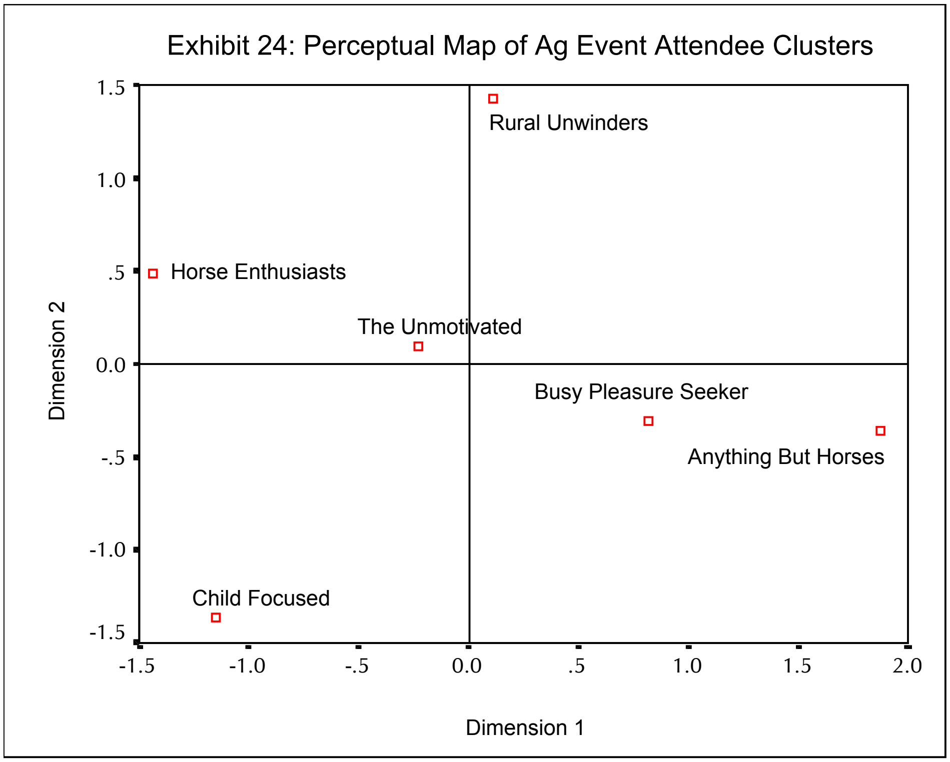


The clusters are shown in Exhibit 22. They varied in size from one-third to one-twelfth of the event attendee population. Their needs and profiles are described in detail later.

The comparative level of interest of each cluster in a trip that includes their preferred ag experience and other preferred trip characteristics is shown in Exhibit 23. From this it may be seen, for example, that although Busy Pleasure Seekers and Rural Unwinders were small groups, they had a high level of interest in an ag experience that met their particular combination of trip needs. In contrast, the large Unmotivated group had the lowest overall interest in a trip including ag experiences, even when their preferred trip attributes were included.



Finally, the perceptual map in Exhibit 24 gives some idea of how each cluster differs from the others in two dimensional space. Dimension 1 can be interpreted as describing a continuum from horse lovers to horse avoiders, while Dimension 2 partly describes a continuum relating to who the trip would be suitable for, running from travelling with children to travelling with adults.



Horse Enthusiasts made up one-quarter of the target audience of event attendees. This group provided an average utility score of 1.35 for Horse Riding on a Ranch (three time the overall value of -.65), while all other types of experiences were rated significantly below average. Almost half rated themselves as knowing a lot about Horse Riding on a Ranch and as having an extremely favourable impression of it. Two-thirds had taken such a trip in the past, and two-thirds of that group had done so in Alberta the previous year. They were both less knowledgeable about, or interested in, Country Shopping, Food & Entertainment than average.

Horse Enthusiasts were looking for country-style accommodation which would be the base for enjoying things nearby and were prepared to travel a longer distance (3+ hours). Their total utility score was 1.95, indicating a level of interest twice the .90 average for the total sample. They expected the cost of an ag trip to be higher than the other clusters ($127 vs. $113 per person per day on average), were more likely to say they would pay $150 or $200 and to pay a higher maximum price ($160 vs. $150).

Half the members of this cluster were found at rodeos, and were especially prevalent at the two stand-alone rodeos. They were underrepresented at farmers' markets and Ag Expo. Demographically, they were more likely to be found in the youngest age group (18-24), living as bachelors or young couples, and less likely to be aged 55+ – particularly not empty nesters.

The next cluster, making up 13% of event attendees, proved to be the antithesis of Horse Enthusiasts. Their distinguishing characteristic was high utility scores for all ag experiences other than Horse Riding on a Ranch (-3.93). Accordingly, they were named **Anything But Horses**. Their total utility score was 2.31, which included a preference for camping (and against country-style accommodation), for making arrangements in advance, and enjoying one or two major experiences while travelling through a region. This group provided high scores for Country Shopping, Food & Entertainment (1.51), Country Style Events (1.49) and Fun Learning About the Country (.93). While other clusters showed even greater preference for country shopping and events, this was the group most likely to be interested in educational opportunities.

Given their profile, one might have anticipated that their awareness of, and interest in, ranch-based horse riding would be lower than average, as was their participation rate. Awareness, interest and participation in Country Shopping, Food & Entertainment was above average. However, the same pattern did not quite hold for the other experiences. Awareness of Fun Learning About the Country was high, but neither interest nor participation were significantly different from the mean for this experience category, nor for Country Style Events.

Half the people belonging to the Anything But Horses cluster were found at fairs, notably at Ag Expo – and also at the Millarville Farmers' Market. They were under-represented at rodeos, including both large urban rodeos, and stand-alone rodeos and in Edmonton. This cluster's most distinctive characteristic was the preponderance of middle aged people without children in their households. Consequently, the cluster members were especially likely to be in the empty nester life stage.

The **Busy Pleasure Seekers** cluster made up 11% of all event attendees and was similarly characterized by low interest in Horse Riding on a Ranch (-1.94). Their particular focus was Country Shopping, Food & Entertainment (1.99 of a 3.87 total), with some interest in learning. Preferred trip characteristics included: a day trip or weekend in a hotel/motel or country style accommodation (but not camping) which would form a local base. They preferred to travel with their usual companions, making arrangements while away, for a variety of different experiences that would keep them busy and on the go,

Cluster members were most likely to be found at farmers' markets (40%), particularly in St. Albert. Not surprisingly, they were underrepresented at all of the rodeos. They were especially prevalent among Edmonton residents, among non-rural residents, and were also less likely to have friends and family they could visit in a rural location.

Slightly older than the Anything But Horses cluster, the vast majority were over the age of 45, and included a higher proportion of older singles and older groups.

Awareness, impressions of, and participation in, Horse Riding on a Ranch were lower than average and on par with the Anything but Horses cluster. They were also lower than average for Country Style Events. However, as one might anticipate, for Country Shopping, Food & Entertainment activities, awareness was higher, attitudes were more favourable and participation more extensive. What was unusual about this cluster was a significantly stronger propensity to also undertake ag activities like country shopping and learning about the country outside Alberta, suggesting a more travel savvy group .

The **Child Focused** cluster made up 9% of the event attendee population, whose key requirement was that the trip be suitable for families with children (utility score 1.24 of a 2.21 total). A review of the trip profile suggested that none of the ag experiences had really caught the group's attention. Although the rating for Horse Riding on a Ranch was higher than average (-.32 vs. -.65), it was still the least preferred activity, with Country Shopping, Food & Entertainment earning the highest score (.33). Country Style Events scored below average (-.08) and Fun Learning About the Country was not significantly different to the overall mean (.07). Awareness, interest and participation in the four ag experience categories resembled that of the all attendees, confirming that there were no stand-out ag activities for members of this cluster.

The few other distinguishing trip characteristic included: below average preference for hotel/motel accommodation and above average interest in travelling with visiting friends and relatives (possibly grandparents).

Half the Child Focused cluster members were found at fairs. Two-thirds were aged 25-44. Two in five had preschool children and one-quarter had young children, suggesting that the children who were the focus were most often under the age of 6. With a larger travel group size, the average estimated cost per person for a trip including ag experiences was lower than average – $89 per person per day vs. $113. However, on a per party basis, it was higher ($282 vs. $254 overall). A similar pattern was found for the maximum price that cluster members were willing to pay: $137 per person and $434 per party vs. $150 and $338 overall.

The smallest cluster, covering 8% of event attendees, was termed **Rural Unwinders**. Almost half were farmers/ranchers and other rural residents away from home, looking for a companionable break from work. Half were found at rodeos. The ag experience of note for this group was Country Style Events (utility score1.97 of a 3.33 total), while Fun Learning About the Country received its lowest rating here (-1.44) – possibly because cluster members live the experience on a day to day basis. Awareness of, and interest in, Country Style Events was significantly higher than average in this group.

Rural Unwinders' other preferred trip characteristics included unusually high preference for travel with one's normal travel companions, an adult-oriented trip, covering a variety of different activities, carried out from a single, more distant location, either on a day trip or camping (but not using country-style accommodation).

The largest cluster, accounting for one in three ag event attendees, has been named **The Unmotivated**. When the highest utility scores were added for each attribute, the total of .96 was less than half that of the other clusters. Its location in the centre of the perceptual map reinforces a less than enthusiastic response to taking a trip involving ag experiences of the type discussed.

Trip preferences expressed by this group were for an adult-oriented trip that could be taken with visiting friends and relatives. Travel intensity would be low – short travel time, a few major experiences, travel around a region staying in campgrounds. Although scores for ranch-based horse riding and ag learning opportunities were above average, they were far lower than in some other clusters which focused on them more enthusiastically. Scores for Country Style Events and Shopping, Food & Entertainment were below average.

As they made up such a large proportion of the population, their demographic and geographic profiles mimicked the total. The only factor on which a statistically significant difference was observed, was a below average chance of taking a trip including ag experiences at the expected cost.

Preference For Trip Attribute Combinations Can Be Modelled

Conjoint analysis allows one to model preferences between alternative or competing products by adding the utility scores for the components (attribute levels) that make up a scenario that was not originally tested. This provides an additional method for estimating the proportion of the event attendee population that would prefer different options for an ag experience. Such simulations were done separately for each person in the sample. The highest score achieved among the alternatives was then selected as representing that person's most likely choice.

Table 12 summarizes the results obtained for ten different simulations. Most tested the impact of one item being changed in the way an ag trip might be "packaged".

The results for the models offering two alternatives (Simulations 1 through 6, 8 and 9) suggested that overall, half the event attendees would select each option and that a similar split would be found among attendees at all three types of events. However, when considering the six market clusters, the distribution varied, based on the more distinctive cluster preferences. Thus, for example, in Simulation 1, an adult-oriented trip focusing on Learning About the Country would appeal more to Busy Pleasure Seekers, Rural Unwinders And Horse Enthusiasts if it involved staying in one location and enjoying things to do nearby, rather than travelling to different places in a region, stopping along the way – all predictable from the preferences expressed by those groups.

What a simple two option simulation does not predict is what would happen if the choice becomes more complex. For example, Simulation 7 combines all four options from Simulations 8 and 9. Simulations 8 and 9 separately would have suggested slightly greater interest in a learning trip based at a central location. Yet, when offered more choices, the order of preference changed. For example, in the Busy Pleasure Seekers cluster, preference for a central location changed to a much preferred combination of central location and country-style accommodation.

Simulation 10 was added to demonstrate choices that might be made when presented with a full range of ag products (the four experience categories). For the other product attributes, the level preferred by those whose first choice was each experience, was used. If we look at the results within the full set of competing options, the Child Focused cluster appeared most interested in an ag learning experience – something not predictable by simply considering the individual conjoint scores, since the Anything But Horses cluster had a far higher score.

Table 12: Maximum Likelihood Distribution of Choices for Products with Different Combinations of Attribute Levels

	Total %	Type of Event			Cluster					
		Rodeo %	Fairs %	Farmers' Markets %	Busy Pleasure Seekers %	Any-thing But Horses %	Rural Un-winders %	Child Focused %	The Unmo-tivated %	Horse Enthu-siasts %
Simulation 1										
Learning + central location + adult-oriented	52	53	51	55	68	46	64	51	39	64
Learning + regional travel + adult-oriented	48	47	49	45	32	54	36	49	61	36
Simulation 2										
Country events + W/E country accommodation + adult-oriented	52	52	49	59	80	39	33	51	46	62
Country events + W/E campground + adult-oriented	48	48	51	41	20	61	67	49	54	38
Simulation 3										
Shop/food/entertainment + central location + adult-oriented	52	53	51	55	68	46	64	51	39	64
Shop/food/entertainment + regional travel + adult-oriented	48	47	49	45	32	54	36	49	61	36
Simulation 4										
Shop/food/entertainment + day trip + adult-oriented	53	51	55	55	49	63	67	53	59	38
Shop/food/entertainment + W/E country accommodation + adult-oriented	47	49	45	45	51	37	33	47	41	62
Simulation 5										
Horse riding + central location + variety experiences + adult-oriented	52	55	49	52	68	40	70	53	41	60
Horse riding + central location + 1-2 major experiences + adult-oriented	48	45	51	48	32	60	30	47	59	40
Simulation 6										
Horse riding + day trip + families	53	51	54	55	49	63	67	52	59	38
Horse riding + W/E country accommodation + families	47	49	46	45	51	37	33	48	41	62
Simulation 7										
Learning + central location + W/E campground + families	22	22	23	19	10	26	41	24	18	22
Learning + regional travel + W/E campground + families	26	27	28	21	10	37	27	27	36	15
Learning + central location + W/E country accommodation + families	31	32	28	35	58	20	23	27	21	41
Learning + regional travel + W/E country accommodation + families	21	19	21	25	22	18	9	22	25	21

	Total %	Type of Event			Cluster					
		Rodeo %	Fairs %	Farmers' Markets %	Busy Pleasure Seekers %	Any-thing But Horses %	Rural Un-winders %	Child Focused %	The Unmo-tivated %	Horse Enthu-siasts %
Simulation 8										
Learning + central location + W/E campground + families	52	53	51	55	68	46	64	51	39	64
Learning + regional travel + W/E campground + families	48	47	49	45	32	54	36	49	61	36
Simulation 9										
Learning + central location + W/E country accommodation + families	52	53	51	55	68	46	64	51	39	64
Learning + regional travel + W/E country accommodation + families	48	47	49	45	32	54	36	49	61	36
Simulation 10										
Horse riding + central location + variety experiences + busy + arrange on trip + W/E country accommodation + 1-3 hours + families + usual companions	25	31	24	17	3	0	8	22	13	73
Learning + regional travel + variety experiences + relax + arrange on trip + day trip + 1-3 hours + families + usual companions	16	11	21	15	12	23	3	35	22	4
Country events + central location + 1-2 major experiences + relax + arrange on trip + day trip + 1-3 hours + adult-oriented + usual companions	30	34	30	22	12	49	74	7	36	15
Shop/food/entertainment + central location + variety experiences + busy + arrange on trip + day trip + 1-3 hours + families + usual companions	28	23	25	46	73	29	15	36	29	9

W/E = Weekend

Simulation 10 also suggests how the four experience categories might stack up against each other among event attendees. The results confirm, for example, that an ag learning experience will be a harder "sell" than the other experience categories. They suggest that the child focused segment, which demonstrated little focused enthusiasm for any of the experiences, would be particularly disinclined to attend country events, while people who looked as if they would choose anything but horses would favour country events more than other alternatives. The analysis also showed that in the clusters that are built around a particular experience, there was some room to cross-promote other experience categories, but it was fairly limited.

Discussion

This section examined the potential composition of agtourism products. Although two features stood out as being by far the most important overall (the experience itself and the trip duration/type of accommodation), it became evident that there were different market segments within the ag event attendee sector, and that these segments favoured different combinations of features. Members of some of these segments are likely to be present at all three event types surveyed – rodeo, fairs and farmers' markets – but in other cases, segments tended to be concentrated at only one type. Most segments also had distinctive demographic and/or geographic characteristics which should help focus marketing efforts on particular events, rather than the general type of event.

Implications And Conclusions

The three types of ag events attracted visitors who were somewhat different from each other demographically, geographically and in terms of their interests and needs. It is therefore imperative that any marketing of agtourism opportunities be tailored to the audiences present at these events if impacts are to be maximized.

The sample of events within each category also showed that individual event profiles may be quite different in important ways from others that appear on the surface to offer similar recreational opportunities. For example, the presence of a large proportion of rural youth, often living with their parents, at the FCA Finals in Red Deer; the attraction of young families to Aggie Days in Calgary and the Haunted Pumpkin Festival in Bon Accord; older visitors at the Ag Expo and North American Seed Fair in Lethbridge and the Harvest Festival at the Ukrainian Cultural Heritage Village; out of province visitors to the CFR Finals in Edmonton and the Lions' Labour Day Rodeo in Cochrane, all suggest that a cookie-cutter promotional approach would not be appropriate, even within a type of event. Knowing who goes where will provide the opportunity to further tailor marketing messages.

The category of fairs showed particular diversity and may need to be classified differently in the future. From a consumer perspective, fairs break down into two very dissimilar experience categories – more business oriented Country Style Events, and more relaxed events in the Country Shopping, Food & Entertainment category.

Rodeo Attendees

Rodeo attendees were different from those at other types of events in: attracting a younger (18-24 years) age cohort, a larger proportion of tourists both from inside and outside the province, and a more rural audience, with many living on farms/ranches or who have friends or relatives they can visit to take part in ag activities. Awareness and favourability of attitudes to Country Style Events and Horse Riding on a Ranch was high. Participation in both types of experiences was also strong, both inside and outside Alberta. Rodeo audiences had an above average interest in taking a pleasure trip in Alberta that included these ag experiences.

A high proportion of the large cluster of "Horse Enthusiasts" was found at rodeos, and the same was true for "Rural Unwinders". Despite having event attendance in common, the two clusters were looking for different things in an ag trip. These should be promoted as two separate options, since both options are unlikely to appeal to the same person (this might mean producing, for example, two separate posters/brochures or having different draws for a prize trip).

The focus of the younger Horse Enthusiasts was on ranch-based horse riding while staying in country-style accommodation. Due to their single minded focus, longer travel time from home was not a concern and neither was a higher price level. Country Shopping, Food & Entertainment was of relatively low interest to them.

The small Rural Unwinders cluster was especially interested in attending Country Style Events. The impression given by this group was that they saw events as an opportunity to take a break from day to day farm/rural life – hence a low interest in Learning About the Country or using country-style accommodation. They preferred to travel with their usual adult companions, take a day trip or camp in a central location and enjoy local activities, and were not averse to destinations that are further afield.

FAIR GOERS

In general, visitors to fairs were not markedly different to the overall population of event attendees except in attracting a high proportion of people with personal farm/ranch/rural links, This lack of distinctiveness may have been the result of the wide variety of profiles identified at different fairs, which served to hide any opposing trends. As mentioned earlier, some of the events stood out for their ability to draw visitors from opposite ends of the life stage spectrum – preschool and young families vs. people of retirement age.

Fair goers' awareness of, attitudes to and participation in the four experience categories proved equally inconsistent – lower than average awareness of Horse Riding on a Ranch, more favourable attitudes to having Fun Learning About the Country and higher participation in Country Shopping, Food & Entertainment in Alberta. As a group, they also expected lower costs for trips that include ag experiences than did attendees at the other types of events.

Nevertheless, fairs were where many people in the "Anything But Horses" and the "Child Focused" clusters were found. As with the two clusters at rodeos, the target audiences and messages that will need to be communicated will be quite different.

Anything But Horses cluster members had in common low awareness of, interest and participation in Horse Riding on a Ranch and preferred any ag trip experience that did not include horse riding – most particularly Country Shopping, Food & Entertainment. Complementary trip characteristics for this group included: making arrangements in advance, travelling around a region while staying at campgrounds, and enjoying a limited number of major experiences. They had above average concentration in the 45-64 years age groups and tended not to have children living at home.

The Child Focused cluster was quite different, with a high proportion of 25-44 year old parents of preschoolers and young children (especially preschoolers). They expected that an ag trip would cost less per person than other clusters and the maximum price they would consider paying per person was also lower. However, total per day expenses would be higher, since they travelled in larger parties which could include visiting friends and relatives. It is possible that discount packaging would be effective in this cluster, but only in combination with strong positioning directed at satisfying parental needs.

The Child Focused cluster did not single out any ag experiences as having particular appeal. In fact, their awareness of these experiences was lower than average. Their need was for an activity appropriate for small children. In addition, accommodation other than a hotel or motel was preferred. In all likelihood, success in marketing to the Child Focused cluster will be determined by sensitive packaging of an ag experience in a way that will ensure that it is suitable for, and appealing to, children, and by promoting it specifically to this audience. This might include use of additional media (e.g., school, nursery school and community group newsletters and bulletin boards) and cross-promotion with other business with the same target market segment (e.g., children's clothing or toy stores).

FARMERS' MARKET SHOPPERS

Visitors to farmers' markets differed from the other types of events in a number of ways. Most lived close to the market and many were Edmonton and Calgary residents. They were less likely to have ties to rural residents, were older (over 45 years) – often empty nester couples – and were more affluent on average.

Their awareness, interest and participation in ag events was above average only in their own experience category, Country Shopping, Food & Entertainment. They also proved to be a more cosmopolitan group, tending to take part more often than the other event attendees in ag activities outside Alberta, especially in Country Shopping, Food & Entertainment and Learning About the Country.

One cluster had a strong presence among farmers' market visitors, namely, "Busy Pleasure Seekers". They shared the same demographic characteristics (non-rural residents – especially from Edmonton – with no informal rural connections, aged 45+, overrepresented among older singles and older groups). They also shared farmers' market visitors' primary interest in the Country Shopping, Food & Entertainment experience category and were far less interested in Horse Riding on a Ranch, or likely to attend a rodeo.

Busy Pleasure Seekers' preferences for a trip like this included: travelling with their normal companions on a day trip, or a weekend trip staying at a central location in accommodation other than a campground. They preferred to keep busy and on the go, to make travel arrangements while they were away and to enjoy a variety of activities.

Given this profile, it is unlikely that cross-selling of other experience categories would have high success at farmers' markets. However, it would be appropriate to create awareness and stimulate interest in other activities encompassed by Country Shopping, Food & Entertainment, provided that they are also suitable for the age/life stage of this audience and its very urban roots and cosmopolitan orientation.

ALL EVENTS

The largest of the clusters, "The Unmotivated" was not strongly associated with any particular type of event; rather, this group's members were found at all events. Similarly, cluster members had no distinguishing ag experience preferences or geographic or demographic characteristics.

However, the group did express a distinctive combination of trip needs. They included: an adult-oriented trip, to be taken with visiting friends or relatives, travelling around in a region, a short distance from home, that would involve only one or two major activities, while staying in a campground. Combined with a low interest in taking an ag trip at its expected price, the impression is of a trip designed to satisfy the need to host visiting friends and relatives and familiarize them with what Alberta has to offer.

Any packaging for this group would need to stimulate lacklustre interest in an ag experience as providing a unique and appropriate way to entertain guests. Discount packaging may well be suitable for the cluster.

Appendix I:
Factor Analysis Of Data From The Study, "Ag Tourism Market Potential Assessment", July 2003

Rotated Component Matrix - 4 Experience Components				
	Component			
	1	2	3	4
	Entertain-ment & Shopping	Horse Enthusiasts	Education Seekers (Learners)	Event Attendees (Spectators)
Attend a country fair with baking, old time contests, and country and western entertainment	0.676			0.377
Shop at a farmers market	0.656			
Enjoy tea in a heritage farmhouse	0.654			
Visit local shops and learn the art of country crafts and western trades, such as quilt making, wheat weaving, blacksmithing, and silver-smithing	0.638			
Attend a fall country supper	0.598			
Take a course while visiting a nursery, flower garden (cut or dried), or herb garden	0.595		0.361	
U-Pick fruits at a market garden	0.564			
Be entertained by music and storytelling at a cowboy poetry festival	0.543			0.461
Shop for ranch, farm, or barn related artwork, crafts, or quilts	0.535			0.390
Stop at various locations to sample regional foods, such as bison sausage, saskatoons, pyrogies and corn	0.533		0.336	
Attend a barn dance and learn how to square dance	0.480			0.313
Visit a Hutterite colony and tour the farm to discover their culture	0.442		0.436	
Go horseback riding on a ranch in the foothills		0.843		
Go horseback riding on a ranch in the prairie		0.839		
Attend a riding camp on a ranch and get instructions in horsemanship		0.811		
Lend a hand on a working ranch and practice reining and roping skills		0.681		0.380
Participate in a cattle drive and learn how to sort and pen cattle		0.608		0.437
Experience cowboy lifestyle by riding in a covered wagon and eating BBQ steaks and chuck wagon biscuits	0.318	0.608		
Take a winter farm tour and enjoy a horse drawn sleigh ride, a shinny hockey game on a dugout and cutting your own Christmas tree	0.327	0.552		
Retreat to a little house on the prairie for a peaceful farm or ranch getaway	0.407	0.509		
Learn about the fine art of horsewhispering (training horses by talking to them)		0.509		0.408
Visit a family entertainment farm with petting zoo, hay bale playground, and pony rides	0.372	0.433		
Find your way through a corn maze		0.415	0.309	
Take an educational rural tour to better understand our commonly seen crops and farm equipment			0.635	0.383
Learn and taste the ins and outs of honey production and beekeeping while visiting an apiary	0.368		0.621	
Tour an experimental research farm to discover the latest methods and technologies in agriculture			0.616	0.364
Visit a dairy milking operation, a restored creamery, and try freshly made yogurt	0.324		0.596	
Learn about how various foods, for example cookies, sugar, pea butter, and sunflower seeds, are made by touring processing facilities	0.472		0.578	
Take part in seasonal farm life activities by experiencing seeding, baling, harvesting and combining			0.577	0.377
Tour the inside of a restored grain elevator			0.575	0.314
Discover the inner workings of a fruit or vegetable greenhouse operation	0.483		0.567	
Take part in seasonal farm life activities by experiencing calving, lambing, sheep shearing, and chicken egg candling		0.378	0.532	0.325
Tour a specialized ranch or farm where they raise elk, bison, ostrich, or alpaca		0.359	0.466	
Attend a large-scale farm animal and equipment exhibition			0.376	0.679
Witness a western livestock auction			0.329	0.671
Attend a horse breed show and sale		0.323		0.657
Watch a rodeo or go behind the scenes and meet some riders				0.603
Attend a heritage farm festival with threshing machines and tractor pulls			0.351	0.552
Watch a demonstration of stock dogs herding sheep	0.314			0.470
Extraction Method: Principal Component Analysis.				
Rotation Method: Varimax with Kaiser Normalization.				
a Rotation converged in 27 iterations.				

Mean Scores on Attitudes by 4 Factor Experience Loading													
		Entertainment & Shopping			Horse Enthusiasts			Education Seekers (Learners)			Event Attendees (Spectators)		
	Total	High	Neutral	Low	High	Neutral	Low	High	Neutral	Low	High	Neutral	Low
Generally, these are things I like to do as part of my vacations and outings	3.93	4.67	3.95	3.14	4.67	3.74	3.34	4.74	3.78	3.39	4.79	3.97	3.15
Generally, these types of activities are fun and enjoyable	5.10	5.74	5.15	4.32	5.73	4.88	4.63	5.65	4.98	4.71	5.85	5.04	4.48
My family and friends might be more interested in these activities than I am	3.54	3.55	3.64	3.44	3.30	3.72	3.65	3.61	3.55	3.50	3.31	3.72	3.59
I don't know anyone else I could go with who would be interested in these types of activities	2.50	2.16	2.48	2.85	2.33	2.57	2.59	2.42	2.56	2.49	2.24	2.50	2.71
I would like to relive the simple country lifestyle	4.19	4.86	4.27	3.37	4.97	3.96	3.59	4.89	4.00	3.77	4.92	4.25	3.50
The idea of western romance is appealing to me	4.18	4.71	4.31	3.46	4.98	3.99	3.54	4.63	3.99	3.99	5.00	4.26	3.39
I plan my vacations and outings around activities my children will enjoy	4.33	4.70	4.52	3.73	4.91	4.35	3.72	4.60	4.26	4.16	4.46	4.40	4.14
When I am on vacation I like to do something different than I do every day	6.17	6.42	6.18	5.91	6.38	6.19	5.94	6.27	6.13	6.14	6.29	6.14	6.11
I am proud of what Alberta has to offer in terms of rural, country activities	5.61	6.00	5.66	5.12	5.83	5.40	5.57	5.97	5.41	5.50	6.10	5.57	5.21
I like to visit Alberta's farm and ranch heritage	4.34	5.08	4.39	3.48	4.91	4.03	4.04	5.25	4.18	3.71	5.30	4.38	3.47
I am interested in activities that provide education for myself or my children	5.34	5.81	5.42	4.80	5.71	5.30	5.04	5.94	5.30	4.91	5.63	5.30	5.17
I like to garden	4.42	5.50	4.51	3.16	4.40	4.27	4.56	5.03	4.30	3.99	4.60	4.32	4.35
I like to vacation with my friends and buddies instead of family	3.01	2.93	3.01	3.08	3.28	3.12	2.61	3.07	3.05	2.92	3.01	3.06	2.96
Having references or recommendations from friends or family is an important part of my decisions on what to do for vacations and outings	4.42	4.57	4.58	4.06	4.65	4.34	4.26	4.69	4.31	4.31	4.66	4.51	4.13
I like horses and riding	4.27	4.31	4.44	4.06	5.83	4.14	2.79	4.28	4.22	4.34	5.28	4.08	3.64
I like to sit back and relax when I'm on vacation	5.41	5.56	5.48	5.23	5.48	5.42	5.38	5.25	5.41	5.60	5.50	5.40	5.40
I like to be physically active when I'm on vacation	5.26	5.34	5.30	5.15	5.68	5.13	4.99	5.66	5.21	4.99	5.43	5.20	5.19
I like the idea of talking to a farm or ranch family about what they do	4.21	4.82	4.23	3.54	4.71	3.88	4.02	5.25	4.04	3.49	5.07	4.25	3.43
I prefer to have a slow paced and stress free vacation	5.49	5.77	5.52	5.13	5.52	5.30	5.63	5.39	5.47	5.57	5.72	5.41	5.35
It is important to me to get back to my roots	4.42	4.90	4.52	3.76	4.86	4.15	4.20	4.99	4.29	4.03	5.10	4.37	3.86
I like the feeling of being in wide open country spaces	5.73	6.14	5.72	5.29	6.11	5.54	5.51	6.04	5.70	5.48	6.23	5.72	5.30
I like the wholesome healthy goodness of fresh food	6.30	6.64	6.37	5.80	6.45	6.15	6.24	6.52	6.21	6.16	6.57	6.19	6.13

Highest score (across)

Close to highest

Mean Scores on Accommodation and Other Activities by 4 Factor Experience Loading													
		Entertainment & Shopping			Horse Enthusiasts			Education Seekers (Learners)			Event Attendees (Spectators)		
	Total	High	Neutral	Low	High	Neutral	Low	High	Neutral	Low	High	Neutral	Low
A cottage	4.96	5.59	5.08	4.22	5.72	4.99	4.19	5.48	4.81	4.73	5.10	5.02	4.83
A cabin	5.16	5.72	5.22	4.58	5.97	5.13	4.41	5.62	5.05	4.94	5.34	5.20	5.02
A restored barn loft	3.83	4.48	3.80	3.18	4.85	3.80	2.80	4.58	3.69	3.33	4.19	3.92	3.43
A bunkhouse	3.14	3.40	3.26	2.74	4.03	3.11	2.27	3.95	2.99	2.63	3.66	3.15	2.71
A farmhouse	4.10	4.82	4.07	3.32	4.98	3.92	3.30	4.98	3.82	3.59	4.54	4.10	3.65
A guest ranch	4.56	5.15	4.66	3.83	5.57	4.61	3.46	5.17	4.30	4.33	4.92	4.68	4.14
A country inn	4.99	5.72	4.98	4.23	5.60	4.90	4.43	5.41	4.73	4.91	5.20	4.86	4.93
A rural hotel	4.31	4.79	4.38	3.73	4.61	4.26	4.05	4.94	4.11	4.00	4.52	4.42	4.02
An independent motel	4.46	4.87	4.52	3.97	4.50	4.44	4.45	4.89	4.25	4.33	4.75	4.55	4.14
A motel that is part of a chain	4.63	4.86	4.75	4.24	4.61	4.61	4.66	4.95	4.45	4.55	4.78	4.74	4.40
Tent camping	3.59	3.60	3.74	3.53	4.48	3.76	2.62	4.14	3.55	3.28	3.68	3.63	3.59
RV camping	3.96	4.14	3.99	3.66	4.31	3.96	3.53	4.28	3.75	3.84	4.49	4.07	3.33
Go hiking	5.25	5.59	5.38	4.82	5.84	5.38	4.58	5.67	5.29	4.91	5.22	5.23	5.37
Go canoeing	4.44	4.57	4.53	4.28	5.28	4.57	3.50	4.82	4.45	4.17	4.50	4.40	4.50
Go on a fishing trip	4.52	4.63	4.55	4.42	4.96	4.54	4.10	4.85	4.45	4.36	4.99	4.55	4.14
Go on a sightseeing trip	5.32	6.07	5.31	4.56	5.54	5.25	5.15	5.72	5.28	5.02	5.59	5.32	5.09
Ride a bicycle	4.88	5.18	4.92	4.59	5.39	5.01	4.28	5.31	4.95	4.50	4.76	4.85	5.08
Visit a museum	5.01	5.69	5.06	4.24	5.24	4.89	4.89	5.50	4.96	4.64	5.33	4.94	4.79
Visit a provincial park or bird sanctuary	5.36	6.08	5.34	4.66	5.63	5.39	5.07	5.80	5.36	5.00	5.62	5.25	5.27
Go hunting	2.38	1.96	2.41	2.82	2.86	2.29	2.03	2.66	2.47	2.09	3.03	2.33	1.93
Go snowmobiling	3.92	3.80	3.88	4.16	4.85	3.93	3.01	4.04	4.08	3.70	4.32	3.94	3.62
Go ATV or quadding	3.98	3.87	3.87	4.25	4.84	4.00	3.08	4.18	4.01	3.79	4.35	4.03	3.63
Go golfing	3.98	3.88	4.03	4.09	4.27	4.07	3.65	4.12	3.83	4.08	4.12	4.10	3.81

Highest score (across)

Close to highest

Demographic Profile by 4 Factor Experience Loading

		Total	Entertainment & Shopping			Horse Enthusiasts			Education Seekers (Learners)			Event Attendees (Spectators)		
			High	Neutral	Low	High	Neutral	Low	High	Neutral	Low	High	Neutral	Low
REGION	Edmonton	384	105	145	125	120	139	115	97	154	124	82	118	175
		32.0	28.6	32.7	35.3	30.5	35.7	30.3	28.9	35.1	31.7	23.6	28.9	42.7
	Calgary	366	117	132	107	133	123	100	111	129	116	99	132	126
		30.5	31.9	29.7	30.2	33.7	31.5	26.3	32.9	29.6	29.6	28.4	32.3	30.6
	Other cities	123	31	48	40	41	39	39	27	50	42	31	48	39
		10.3	8.4	10.9	11.2	10.4	10.0	10.3	8.0	11.4	10.8	9.0	11.9	9.6
	Rural	327	115	118	83	100	90	126	102	105	109	135	110	70
		27.3	31.2	26.6	23.3	25.5	22.9	33.1	30.1	24.0	27.9	39.0	27.0	17.0
Total		1200	367	443	355	395	391	380	337	437	391	347	408	410
		100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
GENDER	Male	501	81	182	228	166	172	153	154	205	131	164	181	146
		41.8	21.9	41.2	64.1	42.2	43.9	40.2	45.8	46.9	33.6	47.2	44.5	35.5
	Female	699	287	260	128	228	219	227	183	232	260	183	227	265
		58.2	78.1	58.8	35.9	57.8	56.1	59.8	54.2	53.1	66.4	52.8	55.5	64.5
Total		1200	367	443	355	395	391	380	337	437	391	347	408	410
		100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
Spouse	yes	957	309	371	251	341	316	274	298	333	301	297	326	309
		79.7	84.2	83.9	70.7	86.5	80.8	72.3	88.3	76.2	77.0	85.5	79.8	75.4
	no	235	56	69	102	53	73	100	36	104	86	50	78	98
		19.6	15.2	15.6	28.6	13.4	18.8	26.4	10.8	23.7	22.1	14.5	19.2	23.9
	dk	8	2	2	2	0	2	5	3	0	4		4	3
		0.7	0.7	0.5	0.7	0.1	0.4	1.3	0.9	0.1	1.0		1.0	0.7
Total		1200	367	443	355	395	391	380	337	437	391	347	408	410
		100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
Children	yes	708	247	268	173	265	242	182	225	244	218	216	247	225
		59.0	67.2	60.5	48.8	67.1	61.8	47.8	66.9	55.9	55.8	62.2	60.6	54.8
	no	482	118	171	181	129	147	193	106	191	172	129	157	184
		40.2	32.1	38.6	50.9	32.8	37.6	50.9	31.6	43.8	43.9	37.2	38.4	44.9
	dk	10	2	4	1	0	2	5	5	1	1	2	4	1
		0.8	0.7	0.9	0.3	0.1	0.6	1.3	1.5	0.3	0.3	0.7	1.0	0.3
Total		1200	367	443	355	395	391	380	337	437	391	347	408	410
		100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
Friends	yes	877	288	333	231	324	282	245	266	310	275	278	315	259
		73.0	78.3	75.3	65.0	82.0	72.2	64.6	79.0	71.0	70.3	80.0	77.1	63.2
	no	318	78	108	122	69	107	132	68	125	115	67	92	150
		26.5	21.4	24.4	34.2	17.4	27.5	34.8	20.2	28.6	29.3	19.2	22.5	36.5
	dk	6	1	2	3	2	1	2	3	2	1	3	2	1
		0.5	0.3	0.3	0.8	0.5	0.3	0.6	0.8	0.4	0.3	0.8	0.4	0.3
Total		1200	367	443	355	395	391	380	337	437	391	347	408	410
		100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
Anyone else?	yes	424	148	180	86	164	139	112	134	179	101	147	155	112
		35.3	40.3	40.6	24.3	41.5	35.4	29.4	39.9	40.9	25.8	42.4	38.0	27.3
	no	773	219	262	267	229	252	267	200	258	290	200	250	298
		64.4	59.7	59.3	75.0	58.0	64.6	70.3	59.3	59.1	74.2	57.6	61.3	72.7
	dk	3		0	2	2		1	3				3	
		0.3		0.1	0.7	0.4		0.3	0.8				0.7	
Total		1200	367	443	355	395	391	380	337	437	391	347	408	410
		100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
Including yourself, how many people live in your household?	1	139	47	48	38	36	44	53	33	57	43	42	52	39
		11.6	12.9	10.8	10.7	9.2	11.3	14.0	9.8	13.1	11.0	12.0	12.8	9.6
	2	419	135	148	120	111	119	172	121	149	133	137	134	132
		35.0	37.0	33.4	33.9	28.3	30.7	45.5	36.3	34.0	34.1	39.6	33.0	32.3
	3	222	58	89	71	74	88	55	60	79	78	53	74	90
		18.6	15.9	20.0	20.1	18.9	22.6	14.7	18.1	18.2	19.9	15.4	18.2	22.1
	4	255	69	91	86	112	70	64	67	90	89	73	81	92
		21.3	19.0	20.6	24.3	28.6	17.8	17.0	20.1	20.5	22.9	21.2	19.9	22.5
	5	101	37	41	23	31	49	21	29	39	33	23	43	35
		8.4	10.0	9.2	6.6	7.8	12.7	5.5	8.8	8.9	8.4	6.7	10.6	8.4
	6	37	11	18	8	20	7	10	12	15	11	11	11	16
		3.1	3.0	4.1	2.4	5.1	1.8	2.7	3.5	3.4	2.7	3.1	2.6	3.9
	7	16	3	5	7	6	9	1	7	6	4	4	8	4
		1.3	0.9	1.2	2.0	1.5	2.2	0.3	2.0	1.3	0.9	1.3	1.9	0.9
	8	5	1	3	0	0	3	1	2	2		0	4	
		0.4	0.3	0.6	0.1	0.1	0.7	0.3	0.7	0.4		0.1	0.9	
	9	3	3			2	1		2	1		2		1
		0.3	0.9			0.6	0.3		0.7	0.2		0.7		0.3
Total		1196	365	443	354	393	390	378	334	437	390	346	407	409
		100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Are you… READ	1-married or common law	828	262	310	232	256	268	280	230	299	274	253	270	281
		69.0	71.3	70.0	65.3	64.9	68.4	73.7	68.2	68.5	70.1	72.8	66.1	68.5
	2-single	247	53	98	91	101	89	52	75	95	71	57	92	93
		20.6	14.4	22.1	25.6	25.6	22.8	13.6	22.4	21.8	18.2	16.3	22.5	22.7
	3-divorced or separatedl	80	30	29	20	31	24	24	21	27	31	25	33	21
		6.7	8.0	6.5	5.8	7.8	6.1	6.3	6.2	6.3	7.8	7.1	8.1	5.1
	4-widowed	33	15	4	10	3	6	20	6	11	12	11	8	10
		2.7	4.1	1.0	2.7	0.7	1.5	5.4	1.8	2.6	3.0	3.0	2.1	2.4
	dk/no opinion	12	8	2	2	4	5	4	5	4	4	2	5	5
		1.0	2.3	0.4	0.7	0.9	1.2	1.0	1.4	0.9	0.9	0.7	1.1	1.3
Total		1200	367	443	355	395	391	380	337	437	391	347	408	410
		100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
Do you have any children in your household aged 14 years or younger?	yes	419	132	162	117	176	141	94	127	148	137	116	145	150
		39.6	41.4	41.2	37.0	49.4	40.8	28.7	41.8	39.0	39.4	38.1	40.8	40.6
	no	638	185	232	200	181	205	232	175	232	210	188	209	220
		60.3	58.3	58.8	63.0	50.6	59.2	70.9	57.9	61.0	60.6	61.9	58.9	59.4
	dk	1	1					1	1				1	
		0.1	0.3					0.3	0.4				0.3	
Total		1059	318	395	317	357	346	327	303	380	347	304	356	370
		100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
Do you currently live… READ ONE ONLY	1-On a farm	142	32	51	49	33	41	58	53	40	39	76	39	17
		11.8	8.8	11.5	13.7	8.3	10.5	15.3	15.8	9.2	9.9	21.8	9.7	4.1
	2-on a ranch	23	7	8	7	5	6	9	3	4	14	18	3	
		1.9	1.8	1.8	1.9	1.3	1.7	2.5	0.9	1.0	3.5	5.1	0.8	
	3-in a rural setting other than on a farm or ranch	128	42	47	36	38	43	44	42	54	29	45	44	36
		10.6	11.5	10.6	10.1	9.6	11.0	11.7	12.4	12.4	7.4	13.0	10.8	8.8
	4-In a town	215	86	73	54	76	62	75	55	72	86	64	79	70
		17.9	23.5	16.6	15.3	19.3	16.0	19.8	16.4	16.6	22.1	18.6	19.4	17.1
	5 In a small urban area	102	34	44	22	41	25	34	26	38	37	28	35	38
		8.5	9.3	9.9	6.2	10.4	6.5	9.0	7.8	8.6	9.4	8.1	8.5	9.2
	6 In a large urban area	587	163	220	187	202	211	157	155	228	186	116	204	249
		48.9	44.4	49.7	52.5	51.2	53.8	41.4	46.1	52.3	47.5	33.4	50.0	60.8
	9-Don't Know	3	2		1		2	1	2		1		3	
		0.3	0.6		0.3		0.6	0.3	0.7		0.3		0.8	
Total		1200	367	443	355	395	391	380	337	437	391	347	408	410
		100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
Thinking about your background and where you grew up, did you live… READ	1-On a farm	364	117	129	105	100	120	132	107	127	117	151	123	77
		30.3	31.8	29.2	29.6	25.4	30.6	34.6	31.6	29.1	30.0	43.4	30.2	18.8
	2-on a ranch	27	4	12	8	9	5	9	5	8	10	16	6	1
		2.3	1.0	2.8	2.3	2.4	1.4	2.4	1.5	1.9	2.6	4.7	1.5	0.3
	3-in a rural setting other than on a farm or ranch	117	39	37	38	52	40	22	25	51	39	34	39	41
		9.7	10.6	8.3	10.8	13.2	10.3	5.7	7.3	11.6	9.9	9.7	9.6	10.1
	4-In a town	237	77	85	70	83	75	75	73	84	77	50	88	94
		19.7	21.0	19.3	19.8	21.0	19.1	19.8	21.6	19.1	19.6	14.5	21.7	22.9
	5 In a small urban area	101	33	36	32	40	30	30	28	34	39	17	38	45
		8.4	8.9	8.1	8.9	10.2	7.7	7.8	8.3	7.7	9.9	4.8	9.4	10.9
	6 In a large urban area	349	95	142	100	109	120	108	97	132	109	78	109	150
		29.1	25.8	32.1	28.2	27.6	30.7	28.5	28.8	30.1	27.7	22.4	26.7	36.7
	9-Don't Know	6	3	1	2	1	1	4	3	2	1	1	3	1
		0.5	0.9	0.2	0.5	0.2	0.3	1.1	0.8	0.5	0.3	0.4	0.8	0.3
Total		1200	367	443	355	395	391	380	337	437	391	347	408	410
		100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Did your spouse or partner grow up… READ	1-On a farm	254	90	86	67	60	80	103	79	90	74	111	85	47
		30.7	34.4	27.7	28.9	23.2	30.0	36.9	34.4	30.1	27.0	44.0	31.5	16.7
	2-on a ranch	13	2	6	2	3	1	6	2	1	7	9	2	
		1.6	0.8	2.1	0.9	1.2	0.4	2.3	1.0	0.3	2.7	3.6	0.6	
	3-in a rural setting other than on a farm or ranch	70	30	25	14	27	21	21	17	29	23	18	26	24
		8.5	11.5	7.9	5.9	10.5	7.7	7.5	7.2	9.7	8.4	7.3	9.7	8.5
	4-In a town	187	60	69	54	58	67	58	44	64	75	46	58	79
		22.5	23.0	22.2	23.1	22.5	24.9	20.9	18.9	21.5	27.2	18.1	21.6	28.0
	5 In a small urban area	77	23	30	23	31	24	21	24	27	25	19	25	32
		9.3	8.8	9.7	9.9	12.3	9.1	7.4	10.4	9.2	9.1	7.6	9.4	11.3
	6 In a large urban area	221	56	91	70	78	71	69	62	86	69	48	71	97
		26.7	21.5	29.4	30.0	30.2	26.4	24.5	26.8	28.8	25.1	19.2	26.3	34.7
	9-Don't Know	7		3	3		4	2	3	2	1	0	2	3
		0.8		0.9	1.2		1.5	0.5	1.2	0.5	0.4	0.2	0.9	1.0
Total		828	262	310	232	256	268	280	230	299	274	253	270	281
		100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
Which of the following age groups are you in. . .	1-18-24	147	19	56	71	77	51	18	40	60	47	33	56	57
		12.3	5.2	12.6	20.0	19.4	13.1	4.7	11.7	13.6	11.9	9.5	13.6	13.9
	2-25-34	265	66	99	96	124	84	54	84	96	82	60	85	117
		22.1	18.0	22.4	27.0	31.3	21.4	14.2	24.9	22.0	20.8	17.3	20.8	28.4
	3-35-44	301	100	128	66	113	106	75	76	119	98	89	104	100
		25.0	27.3	28.8	18.4	28.5	27.1	19.8	22.4	27.3	25.2	25.6	25.6	24.4
	4-45-54	249	84	88	69	49	95	97	66	88	87	86	79	77
		20.8	22.9	20.0	19.3	12.5	24.2	25.6	19.7	20.1	22.2	24.8	19.3	18.7
	5-55-64	138	64	42	27	24	38	72	40	48	46	53	54	26
		11.5	17.5	9.5	7.6	6.1	9.6	18.8	11.9	10.9	11.6	15.2	13.3	6.4
	6-65 & over	90	26	27	27	4	15	60	28	26	27	25	25	30
		7.5	7.2	6.1	7.6	1.1	3.9	15.9	8.3	5.8	6.9	7.2	6.1	7.4
	9-Don't Know	10	7	2	0	4	3	4	3	1	5	1	6	3
		0.8	1.9	0.5	0.1	0.9	0.7	0.9	1.0	0.3	1.3	0.4	1.4	0.7
Total		1200	367	443	355	395	391	380	337	437	391	347	408	410
		100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
Is your total household income before taxes above or below … ?	Below $50,000	370	134	124	96	125	109	120	114	123	118	114	132	108
		30.8	36.6	28.1	27.0	31.7	28.0	31.7	33.7	28.1	30.2	32.9	32.3	26.4
	$50,000-$80,000	325	88	134	97	112	113	94	99	124	95	91	110	117
		27.1	23.9	30.3	27.3	28.3	28.8	24.9	29.4	28.4	24.4	26.2	27.0	28.6
	$80,000-120,000	223	60	89	70	70	76	74	53	83	84	67	80	73
		18.6	16.4	20.2	19.8	17.7	19.3	19.6	15.7	19.0	21.4	19.2	19.6	17.8
	$120,000+	117	27	44	45	35	49	33	26	50	40	28	40	48
		9.8	7.4	9.9	12.7	8.8	12.5	8.7	7.8	11.5	10.2	8.1	9.7	11.8
	DK	165	58	52	47	54	45	58	45	57	54	47	46	63
		13.7	15.7	11.7	13.2	13.6	11.4	15.2	13.4	13.0	13.9	13.5	11.4	15.3
Total		1200	367	443	355	395	391	380	337	437	391	347	408	410
		100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

5% above average
5% below average
10% above average
10% below average

Profile of Experience Groups with a High Factor Loading				
	Entertainment & Shopping	**Horse Enthusiasts**	**Education Seekers (Learners)**	**Event Attendees (Spectators)**
Attitudes	***(Highest Score)***			
	When I am on vacation I like to do something different than I do every day	I would like to relive the simple country lifestyle	My family and friends might be more interested in these activities than I am	Generally, these are things I like to do as part of my vacations and outings
	I like to garden	I plan my vacations and outings around activities my children will enjoy	I don't know anyone else I could go with who would be interested in these types of activities	Generally, these types of activities are fun and enjoyable
	I like to sit back and relax when I'm on vacation	I like to vacation with my friends and buddies instead of family	I am interested in activities that provide education for myself or my children	The idea of western romance is appealing to me
	I prefer to have a slow paced and stress free vacation	I like horses and riding	Having references or recommendations from friends or family is an important part of my decisions on what to do for vacations and outings	I am proud of what Alberta has to offer in terms of rural, country activities
	I like the wholesome healthy goodness of fresh food	I like to be physically active when I'm on vacation	I like the idea of talking to a farm or ranch family about what they	I like to visit Alberta's farm and ranch heritage
				It is important to me to get back to my roots
				I like the feeling of being in wide open country spaces
	(Close to Highest Score)			
	My family and friends might be more interested in these activities than I am	I don't know anyone else I could go with who would be interested in these types of activities	Generally, these are things I like to do as part of my vacations and outings	I would like to relive the simple country lifestyle
	I would like to relive the simple country lifestyle	The idea of western romance is appealing to me	I would like to relive the simple country lifestyle	Having references or recommendations from friends or family is an important part of my decisions on what to do for vacations and outings
	I am proud of what Alberta has to offer in terms of rural, country activities	When I am on vacation I like to do something different than I do every day	I am proud of what Alberta has to offer in terms of rural, country activities	I like to sit back and relax when I'm on vacation
	I like the feeling of being in wide open country spaces	Having references or recommendations from friends or family is an important part of my decisions on what to do for vacations and outings	I like to visit Alberta's farm and ranch heritage	I prefer to have a slow paced and stress free vacation
		I like to sit back and relax when I'm on vacation	I like to be physically active when I'm on vacation	I like the wholesome healthy goodness of fresh food
			It is important to me to get back to my roots	
Other Activities	***(Highest Score)***			
	Go on a sightseeing trip	Go hiking		Go on a fishing trip
	Visit a museum	Go canoeing		Go hunting
	Visit a provincial park or bird sanctuary	Ride a bicycle		
		Go snowmobiling		
		Go ATV or quadding		
		Go golfing		
	(Close to Highest Score)			
		Go on a fishing trip	Ride a bicycle	
Accommodation	***(Highest Score)***			
	A country inn	A cottage	A farmhouse	RV camping
		A cabin	A rural hotel	
		A restored barn loft	An independent motel	
		A bunkhouse	A motel that is part of a chain	
		A farmhouse		
		A guest ranch		
		Tent camping		
	(Close to Highest Score)			
	An independent motel		A bunkhouse	
	A motel that is part of a chain			

	Entertainment & Shopping	Horse Enthusiasts	Education Seekers (Learners)	Event Attendees (Spectators)
Demographics	***(10%+ above or below average)***			
	Female	With children 14 or younger		Live on a farm or ranch
				Do not live in large urban area
				Grew up on farm or ranch
				Spouse/partner grew up on farm or ranch
	(5%-10% above or below average)			
				Male
		Travel with spouse/partner	Travel with spouse/partner	Travel with spouse/partner
	Travel with children 14 or younger	Travel with children 14 or younger	Travel with children 14 or younger	
	Travel with friends	Travel with friends	Travel with friends	Travel with friends
	Travel with others	Travel with others		Travel with others
		Large household		
		Single		
	Live in a town			
		Did not grow up on a farm		Did not grow up in an urban area
	Spouse/partner did not grow up in a large urban area	Spouse/partner did not grow up on a farm or ranch		Spouse/partner did not grow up in a large urban area
	55-64	18-34		
	Not 18-24	Not 45+		
	Under $50,000			

Appendix II: Record Of Contacts

Record Of Contacts

	Cochrane Lion's Labour Day Rodeo	Millarville Farmers' Market	St. Albert Farmers' Market	Ukrainian Village Harvest Festival	Red Deer FCA Finals Rodeo	Bon Accord Haunted Pumpkin Festival	Edmonton Farmfair	Edmonton Canadian Finals Rodeo	Lethbridge Ag Expo & Seed Fair	Calgary Roughstock Rodeo & Aggie Days
Double Contact	108	32	3	72	45	2	25	15	75	23
Refused	336	374	257	120	243	38	176	336	858	1018
Mid-Interview Termination	14	9	9	5	6	0	1	0	12	44
Communication Problem	10	0	3	9	0	0	1	0	1	0
Under 18	7	0	0	0	2	0	0	2	33	2
Complete	**170**	**173**	**169**	**100**	**173**	**75**	**181**	**171**	**170**	**274**

Appendix III: Questionnaire

Event-Based Market Potential for Agtourism

QUESTIONNAIRE #: _ _ _ _

DATE: __ /__ / __

dd/ mm/ yy

INTERVIEWER:___________________________

INTERVIEW LOCATION:

Calgary Stampede Park: Roughstock Rodeo/ Aggie Days ....1 ➡ Interviewed at Rodeo ....1 At Exhibits......... 2
Cochrane: Lions Labour Day Rodeo 2
Edmonton Northlands: Canadian Finals Rodeo/ Farmfair ....3 ➡ Interviewed at Rodeo ....1 At Exhibits......... 2
Lethbridge Exhibition Park: Ag Expo and the North American Seed Fair 4
Millarville Farmers Market 5
Red Deer Westerner Park: FCA Finals Rodeo 6
St. Albert Farmers Market 7
Ukrainian Cultural Heritage Village: Harvest Fair 8

INTRODUCTION: Hello. I'm … of Infact Research and Consulting. We are conducting a survey on behalf of the Government of Alberta. The survey is about things to do when taking a trip for pleasure in Alberta, and we would love to hear your opinions.

ADD IF NEEDED: There are no right or wrong answers and the information you provide will be kept confidential as no one person's information is given out.

IF ASKED: The study is for Alberta Agriculture, Food and Rural Development. The Ministry contact is Bill Reynolds (780) 427-4424.

1. RECORD GENDER BY OBSERVATION

Male...1
Female..2

CHECK GENDER QUOTA (Max. 60% of total quota at each site with either gender) (i.e., max 204:136 at CFR/Farmfair, Roughstock/Aggie Days; 102:68 all others)

2. How far away do you live from here: **READ**

Up to 40 km or 25 miles 1
41 to 80 km or 26 to 50 miles..2
In Alberta, further than 80 km or 50 miles away................3
In another province...4
In another country...5

CHECK NON-ALBERTA QUOTA (Max. 50 CFR/Farmfair, Roughstock/Aggie Days; 25 all others)

IF AT CFR/FARMFAIR ASK Q3; OTHERWISE SKIP TO Q4

3. a. IF INTERVIEWED AT FARMFAIR: Have you also attended the Canadian Finals Rodeo or do you intend to do so? DO NOT READ

Yes, have attended CFR.................... 1
Intend to do so...................................... 2
No... 3
Don't Know.. 9

b. IF INTERVIEWED AT CFR: Have you also attended Farmfair International or do you intend to do so? DO NOT READ

Yes, have attended Farnfair............. 1
Intend to do so...................................... 2
No... 3
Don't Know.. 9

IF AT ROUGHSTOCK/AGGIE DAYS ASK Q3; OTHERWISE SKIP TO Q4

3. a. IF INTERVIEWED AT AGGIE DAYS: Have you also attended the Roughstock Rodeo or do you intend to do so? DO NOT READ

Yes, have attended Roughstock.... 1
Intend to do so...................................... 2
No... 3
Don't Know.. 9

b. IF INTERVIEWED AT ROUGHSTOCK RODEO: Have you also attended Aggie Days or do you intend to do so? DO NOT READ

Yes, have attended Aggie Days.... 1
Intend to do so...................................... 2
No... 3
Don't Know.. 9

READ: I am going to read you a few groups of activities and then ask some questions about them.

4. The … (first/ next) group of activities includes … **READ ACTIVITY DESCRIPTION. ROTATE ORDER.** Please tell me how much you know about these types of activities as something to experience on a pleasure trip in Alberta. Overall, do you 'Know a lot about these experiences', 'Know something', 'Know a little', 'Have heard of but know nothing about them', or 'Have you never heard of them' ?

COMPLETE Q5 AND Q6 FOR EACH EXPERIENCE BEFORE REPEATING FOR THE NEXT ONE.

5. And what is your impression of … (Ranch-based horse riding experiences / Country shopping, food and entertainment activities / Fun activities to learn about the country / Country style events) like these as something for you and the people you travel with to do, when taking a pleasure trip in Alberta. Is your impression 'Extremely favourable', 'Very favourable', 'Somewhat favourable', 'Neither favourable nor unfavourable, 'Somewhat unfavourable', 'Very unfavourable' or 'Extremely unfavourable'?

6. a. (Not counting today,) have you participated in … (Ranch-based horse riding experiences / Country shopping, food and entertainment activities / Fun activities to learn about the country / Country style events) like these while on a pleasure trip? **(NOTE: Where applicable, exclude today's trip)**

   b. **IF YES**: Where have you participated in …(Ranch-based horse riding experiences / Country shopping, food and entertainment activities / Fun activities to learn about the country / Country style events) on a pleasure trip. Was this in …? **READ EACH LOCATION**

   c. **IF YES TO AB, ANY OTHER**: (Not counting today,) in the last 12 months, how many times have you taken a pleasure trip which included … …(Ranch-based horse riding experiences / Country shopping, food and entertainment activities / Fun activities to learn about the country / Country style events) at a destination … (in Alberta/outside Alberta) that was more that 80 km or 50 miles away from your home?

ROTATE				
	HORSE RIDING ON A RANCH in the foothills or on the prairie; being instructed on horsemanship at a ranch riding camp; practicing reining and roping skills; participating in a cattle drive and learning how to sort and pen cattle; or experiencing the cowboy lifestyle while riding in a covered wagon, eating BBQ steaks and chuck wagon biscuits.	COUNTRY SHOPPING, FOOD AND ENTERTAINMENT such as at a country fair which includes things such as baking, old time contests and country and western entertainment; shopping at a farmers market; tea in a heritage farmhouse; visiting local shops and learning about the art of country crafts and western trades like wheat weaving or blacksmithing; or U-pick fruits at a market garden.	HAVING FUN LEARNING ABOUT THE COUNTRY by taking a farm tour to better understand our crops, farm equipment, livestock and seasonal farm activities; tasting fresh honey and learning the ins and outs of honey production and beekeeping; touring processing facilities to learn how cookies, sugar, pea butter and sunflower seeds are made; or discovering the inner workings of a fruit or vegetable greenhouse operation.	ATTENDING COUNTRY STYLE EVENTS, such as a large-scale farm animal and equipment exhibition; a western livestock auction; a horse breed show and sale; a rodeo; a heritage farm festival with threshing machines and tractor pulls; or a demonstration of stock dogs herding sheep.
4. Know a lot about these experiences	1	1	1	1
Know something	2	2	2	2
Know a little	3	3	3	3
Have heard of but know nothing about them	4	4	4	4
or Have you never heard of them?	5	5	5	5
DON'T READ: Don't know	9	9	9	9
5. Extremely favourable	1	1	1	1
Very favourable	2	2	2	2
Somewhat favourable	3	3	3	3
Neither favourable nor unfavourable	4	4	4	4
Somewhat unfavourable	5	5	5	5
Very unfavourable	6	6	6	6
or Extremely unfavourable	7	7	7	7
DON'T READ: Don't know	9	9	9	9
6a. No	1	1	1	1
Yes	2 ↓	2 ↓	2 ↓	2 ↓
6b. Alberta?	↓ Yes..... 1 No..... 2 DK..... 9	↓ Yes... 1 No..... 2 DK.... 9	↓ Yes...... 1 No.... 2 DK..... 9	↓ Yes . 1 No . 2 DK .. 9
Another Canadian province or territory?	Yes.... 1 No...... 2 DK...... 9	Yes... 1 No..... 2 DK.... 9	Yes...... 1 No.... 2 DK..... 9	Yes . 1 No . 2 DK .. 9
The USA?	↓ Yes.... 1 No...... 2 DK...... 9	↓ Yes... 1 No..... 2 DK.... 9	↓ Yes...... 1 No.... 2 DK..... 9	↓ Yes . 1 No . 2 DK .. 9
Another country?	Yes.... 1 No...... 2 DK...... 9	Yes... 1 No..... 2 DK.... 9	Yes...... 1 No.... 2 DK..... 9	Yes . 1 No . 2 DK .. 9
6c. In Alberta (sp. #)				
Outside Alberta (sp. #)				

7. I'd like you to rate a variety of descriptions of pleasure trips to show how interested you would be in taking trips like that. Please read the description and then use the scale below to rate the chances that you would take such a trip. **ROTATE ORDER**

Card	Answer	Card	Answer	Card	Answer
A		G		M	
B		H		N	
C		I		O	
D		J		P	
E		K		Q	
F		L		R	

8. a. In total, approximately how much would you expect to pay per day, for a pleasure trip in Alberta which included these types of experiences? Please include expenses for transportation, food, accommodation, recreation and entertainment, and shopping, in your estimate.

$ __________ **IF DK, SKIP TO Q9**

b. How many people would the $… (**READ ANSWER IN Q8a**) per day cover? **IF DK, SKIP TO Q9**

c. **SHOW RATING CARD**: What are the chances you would take a trip that included these types of experiences for $ … (**READ ANSWER IN Q8a**) per day?

Rating: 0 1 2 3 4 5 6 7 8 9 10 DK ➔ **SKIP TO Q9**

d/ e/ f/ g. **IF BELOW HIGHEST PRICE LEVEL AND RATED 1 TO 9, SHOW RATING CARD** What are the chances you would take a trip that included these types of experiences for … per day? **PRICE UP AND REPEAT UNTIL ANSWER OF "0" IS RECEIVED, OR HIGHEST PRICE IS COMPLETED**

h/ i/ j/ k. **IF ABOVE LOWEST PRICE LEVEL AND RATED 0, SHOW RATING CARD** What are the chances you would take a trip that included these types of experiences for … per day? **PRICE DOWN AND REPEAT UNTIL ANSWER OF "10" IS RECEIVED OR LOWEST PRICE IS COMPLETED**

ELSE SKIP TO Q9

Per Person Price Levels Used: $50, $100, $150, $200 (scaled up for 2, 3, 4 and 5+ people covered).

RATING SCALE:

10	Certain or practically certain	(99 chances in 100)
9	Almost sure	(9 chances in 10)
8	Very probable	(8 chances in 10)
7	Probable	(7 chances in 10)
6	Good possibility	(6 chances in 10)
5	Fairly good possibility	(5 chances in 10)
4	Fair possibility	(4 chances in 10)
3	Some possibility	(3 chances in 10)
2	Slight possibility	(2 chances in 10)
1	Very slight possibility	(1 chance in 10)
0	No chance or almost no chance	(1 chance in 100)

READ: Finally I have a few questions about you that will be used for classification purposes only.

9. Do you have family or friends in Alberta, or elsewhere, who live on a farm, ranch or in a rural setting, who you could visit to take part in activities like these? **DO NOT READ ANSWERS; IF NECESSARY ("YES") PROBE:** Is that in Alberta or elsewhere?

Yes, in Alberta........................ 1
Yes, elsewhere........................ 2
Yes, both.................................. 3
No... 4
Don't know.............................. 9

10. Including yourself, how many people live in your household?

Number in Household ____________ **IF 1, SKIP TO Q12**

11. **IF MORE THAN 1:** How old is the youngest child living in your household?

Up to 5 years...1
6 to 12 years...2
13 to 17 years...3
18 or older...4
No children in household........................5
DO NOT READ: Don't know..........8
Refused....................9

12. Do you currently live: **READ**

In Calgary..1
In Edmonton..2
In a large urban area.................................3
Ina a small urban area..............................4
In a town..5
In a rural setting other than on a farm or ranch..................6
On a farm or a ranch.................................7
DO NOT READ: Don't know.................8
Refused.......................9

13. Which of the following age groups are you in? **READ**

18-24...1
25-34...2
35-44...3
45-54...4
55-64...5
65 and over...............................6
DO NOT READ: Don't know............8
Refused.....................9

14. a. Is your total household income, before taxes, over or under $80,000?

Under $80,000................X ➔ b. Is it over or under $50,000?

Under $50,000.................1
Over $50,000....................2
Don't know Q14b..........3
Refused Q14b..................4

Over $80,000...................Y ➔ c. Is it over or under $120,000?

Under $120,000 5
Over $120,000.................6
Don't know Q14c..........7
Refused Q14c..................8

Don't know Q14a..........9
Refused Q14a..................10

Name:__________________________

Phone:__________________________

Trip Description A

Type of Experience:	Have fun learning about the country *
Type of Trip:	Travel to one location, enjoying things to do nearby
Activity Level:	Enjoy a variety of different experiences Keep busy and on the go
Choose and Arrange Where to Go, What to Do, Where to Stay:	In advance
Trip Length & Accommodation:	Weekend getaway staying in country style accommodation e.g., ranch, cabin, country inn, farmhouse
Travel Time from Home:	Longer than 3 hours
Suitability:	Adult-oriented Somewhere to go with the people you normally travel with

* <u>Examples of fun activities to learn about the country</u>: Taking a farm tour to better understand our crops, farm equipment, livestock and seasonal farm activities; tasting fresh honey and learning the ins and outs of honey production and beekeeping; touring processing facilities to learn how cookies, sugar, pea butter and sunflower seeds are made; or discovering the inner workings of a fruit or vegetable greenhouse operation.

10	Certain or practically certain	(99 chances in 100)
9	Almost sure	(9 chances in 10)
8	Very probable	(8 chances in 10)
7	Probable	(7 chances in 10)
6	Good possibility	(6 chances in 10)
5	Fairly good possibility	(5 chances in 10)
4	Fair possibility	(4 chances in 10)
3	Some possibility	(3 chances in 10)
2	Slight possibility	(2 chances in 10)
1	Very slight possibility	(1 chance in 10)
0	No chance or almost no chance	(1 chance in 100)