

2003 Survey of Visitors to Banff, Jasper, Kootenay, and Yoho National Parks of Canada

Sponsored by Parks Canada and the
Mountain Parks Visitor Survey Partnership with a
contribution by Alberta Economic Development





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Alberta
ECONOMIC DEVELOPMENT

2003 Mountain Park Visitor Survey

A yearlong survey of visitors to Banff, Jasper, Kootenay, and Yoho
National Parks of Canada

Sponsored by:

Parks Canada

The Canadian Tourism Commission

and the Mountain Park Visitor Survey Partnership, including:

Tourism British Columbia

The Banff Lake Louise Hotel Motel Association

The Canadian Rockies Tourism Destination Region

Economic Development Edmonton (Edmonton Tourism)

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Background and Methods

Background

The 2003 Survey of Visitors to Banff, Jasper, Kootenay, and Yoho National Parks is the most comprehensive study of national park visitors ever conducted in the Four Mountain Parks¹. The survey addresses many aspects of visitor use of the parks, including motivations, activities, satisfaction, and spending. While most of the survey relates to visitor activities within the parks, it also offers a regional context for their travel. Its results will be of interest to those who look at park visitor behaviour from an ecological perspective, economic perspective, social perspective, or a commercial perspective.

The survey was designed to represent all visitors to the Four Mountain Parks – travelling independently or with a group tour – during the 2003 calendar year (January through December 2003).

A detailed diary of visitor trips to the parks captured movement through the parks; including a record of their activities, accommodation and meals, where visitors went, how long they spent in each location and the sequence in which they took part in the various activities. Survey information is linked to the network of traffic counters (which estimate visitor counts), to help park managers reliably estimate visitors' activities and profiles for the Four Mountain Parks as a unit, for each individual parks, or for key visitor nodes.

Research Methods

The survey used two sets of research methods – one set for group tours (organised groups travelling together in a motorcoach) and one set for independent visitors (visitors travelling by personal vehicle; or by scheduled train, bus, or shuttle).

Independent Visitor Research Methods

Independent visitors were surveyed using a multi stage design administered at:

- each of the six entry points to the parks²;
- at the bus and train stations in Jasper and Banff; and

¹ For this report, the Four Mountain Parks refers to Banff, Jasper, Kootenay, and Yoho National Parks of Canada.

² The Banff East Gate and David Thompson Gate into Banff, the Jasper East Gate and Jasper West Gate, the Yoho West Gate (from Golden), and the Radium Gate into Kootenay.

- at the Calgary Airport for park-bound ground shuttles.

The first stage of the intercept determined the potential respondent's willingness to participate and eligibility. Then, field researchers interviewed eligible and willing respondents to gather baseline population information.

The field researchers gave willing and eligible respondents a questionnaire to be completed during and after their visit. They had the option of completing the paper survey form and mailing it back, or completing an on-line version. The paper and online versions of this questionnaire were available in English, French, and German.

Researchers have used the intercept information:

- to develop reliable visitor arrival estimates from traffic counter data;
- to weight response data so that the survey results represent the population of park visitors, with the same characteristics – in the same proportions – in both the intercept sample and the questionnaire returns; and
- to weight results up to the population of park visitors.

For the independent surveys, field researchers conducted more than 40,000 intercepts over the twelve-month period. Of the 13,373 eligible visitor parties (identified through the intercept survey), 9,348 agreed to participate in the survey. A total of 2,376 questionnaires were completed on-line or returned on the paper survey form, for a 25% return rate.

Because of the large size and rigorous sampling, intercept survey results are considered reliable, plus or minus 1.3%, 19 times out of 20. In other words, if twenty samples were taken the same way, the results would be the same as those presented here – plus or minus 1.3%– in nineteen of those samples. Other samples are smaller and rely on more levels of stratification, so have slightly wider margins:

- questionnaire results are considered reliable $\pm 3.1\%$; and
- expenditure information is considered reliable $\pm 3.3\%$.

Group Tours Research Methods

The group questionnaire was much shorter and designed as a cluster sample of tour escorts and passengers (that is, everyone on a selected bus received a survey). Therefore, information about the tour itself formed part of the population profile data, while individual members of the tour were able to recount their experiences and motivations. The survey contained several questions identical to independent survey and was available in English, French, Japanese, Korean, and Chinese (readable in Mandarin and Cantonese).

Group tours were intercepted at the Banff Gondola and the Columbia Icefield centre, two locations frequented by most tours entering the parks, and for which reliable population data is available.

Tour leaders were selected for a brief interview. Six hundred eleven group (611) tours were intercepted with 580 accepting an interview (95% participation rate). Of those who took part in the interview, 442 (76%) accepted the questionnaires for individuals on the tour. A total of 11,931 questionnaires were distributed with 2,213 being returned (19% response rate).

Group tour information is considered to be reliable, $\pm 4.4\%$, 19 times out of 20.

Independent Visitors - Profile of Visitors

Origin

During 2003, an estimated 3,406,640 independent visitors entered the Four Mountain Parks³. Almost half (45%) were from Alberta, 21% from other parts of Canada, 21% from the United States, and 13% from other international origins.

Albertan independent visitors were predominant, especially in the winter season (over 60% from January to March and October to December). International independent visitors (typically Europeans) were more likely to visit in the middle quarters (Q2, April to June; and Q3, July to September).

Day/Overnight Visits

About one-third (36%) of visitors to the Four Mountain Parks were day visitors.

Albertan visitors were less likely to make overnight trips (50%) than others (other Canadians 71%; Americans 78%; Europeans 87%; and other international origins 74%).

Length of Stay in the Four Mountain Parks

The average length of stay for overnight visitors was 3.4 nights, with the longest average stays during the July to September period (3.8 nights) and the shortest during the October to March period (2.8 nights).

Overnight visitors from Alberta stayed an average of 2.4 nights and other Canadians stayed an average of 3.3 nights. Long-haul overnight visitors stayed considerably longer in the Four Mountain Parks:

- Americans spent 4.0 nights;
- Europeans spent 4.6 nights; and
- other international visitors spent 4.2 nights.

³ Results in this section apply to independent visitors only... group tour results are presented in the final section of this Executive Summary.

Party Size

The average independent visitor group included 2.6 people, with little variation by origin.

Visit Purpose

Most visitors (93%) entered the parks for recreation and pleasure. A small percentage (4%) came for business, for business and pleasure (2%), or to visit park residents (1%).

First-time Visitors

Few of the Albertan visitors were in the parks for the first time (3%), compared to nearly one-third of other Canadian visitors. A notable number of non-Canadian visitors had visited the Four Mountain Parks previously. Almost 40% of Americans and 33% of other international visitors reported previous visits.

Among repeat visitors, most of the Albertans (76%) had visited the parks three or more times in the previous two years.

Importance of the Parks to Visitor Travel Decisions

Most visitors (63%) said that the main reason for their trip from home was to visit the Four Mountain Parks. Others (30%) made the parks one of several reasons for travelling, while some (7%) were travelling for other reasons.

Albertans were more likely to make the parks the main reason for their trip from home (82%) than other Canadians and Americans (49%), or other international visitors (37%). These long-haul visitors were more likely to make the parks one of several reasons for travelling (other Canadians and Americans 43%; other international visitors 60%; Albertans only 12%)

Independent Visitors - Profile of Visits

Travel Nights Outside the Parks

The parks generate considerable tourist activity in Alberta and British Columbia. Respondents indicated how many nights they spent outside the parks in selected Alberta and British Columbia communities as part of their trip from home. Visitors to the Four Mountain Parks generated more than 9 million visitor nights of accommodation outside the parks in Alberta and British Columbia⁴.

The largest number of person nights was in Calgary (nearly 2.5 million person nights), Canmore and Vancouver (1 million person nights each), and Edmonton (0.75 million person nights).

Table 1 – Nights Away from Home in Major Alberta Communities

Alberta Communities			
Community	Avg. Nights Spent ⁵	Est. Number of Visitors	Est. Number of Visitor Nights
Calgary	3.03	813,072	2,467,401
Canmore	2.86	348,330	996,234
Edmonton	2.75	267,282	734,541
Kananaskis Country	3.58	59,539	213,431
Waterton	2.19	63,220	138,647
Hinton	1.31	94,863	123,860
Lethbridge	1.92	57,730	110,697
Medicine Hat	1.54	45,570	70,329
D Thompson Highway	2.02	32,506	65,578
Red Deer	1.47	26,661	39,174
Grand Cache	1.16	19,589	22,674
Other Alberta	2.65	260,435	691,178

⁴ Person nights = number of visitors times number of nights. For example, four people spending two nights in a community would represent eight person nights. The survey did not ask respondents to specify the type of accommodation used in each centre.

⁵ This is the average number of nights for those who reported staying in a community. Those who did not stay in a community were not included in the calculation.

Table 1 (cont'd.) – Nights Away from Home in Major British Columbia Communities

British Columbia Communities			
Community	Avg. Nights Spent	Est. Number of Visitors	Est. Number of Visitor Nights
Vancouver	3.27	314,496	1,027,576
Other Vancouver Island	3.98	99,705	396,959
Radium/Invermere	3.10	126,766	392,472
Victoria	3.37	90,055	303,383
Kelowna/Okanagan	2.65	147,622	205,837
Kamloops	1.43	143,459	205,837
Revelstoke area	1.16	133,822	155,299
Golden	1.28	90,908	116,002
Kimberley/Cranbrook	1.38	82,431	113,359
Prince George	1.76	56,378	99,332
Valemont/McBride	1.43	61,523	88,263
Other BC	3.05	232,594	709,964

Accommodation in the Four Mountain Parks

Over 2 million visitors to the Four Mountain Parks stayed overnight. Commercial roofed accommodation (hotel, motel and lodge) accounted for two thirds of the accommodation used in the Four Mountain Parks, followed by camping at 20%.

The longest average stays were reported for campgrounds (2.7 nights) and the shortest with friends and relatives (1.8 nights).

Table 2 – Accommodation in the Parks

Mountain Parks			
Community	Avg. Nights Spent	Est. Number of Visitors	Est. Number of Visitor Nights
Campground	2.69	505,881	1,344,530
Hotel, Motel, Lodge	2.52	1,637,354	4,113,712
Hostel	2.52	68,804	168,093
Commercial Bed and Breakfast	2.12	106,940	226,385
Home of Friend or Relative	1.86	115,090	207,210
Wilderness	2.24	28,316	64,261

Pre-visit Information

The most common sources of pre-visit or en route information include past experience (47%), friends and relatives (30%), maps (27%) and travel guidebooks (22%). The internet is a popular source of pre-trip information, too. Websites hosted by Parks Canada (17%), Travel Alberta (12%), and others (11%) were popular pre-trip information sources.

Few visitors used television (2%) or radio (1%) for their pre-trip information.

In-Park Information

While in the parks, visitors relied on their own past experience (34%), maps (31%), Parks Canada Visitor Information Centres (24%), the Parks Canada **Mountain Guide** publication (20%), and BC or Alberta Travel Information Centres (15%).

Activities

The most popular activities include 'driving and sightseeing' (54%), 'eating in a restaurant' (45%), 'shopping' (35%), 'sightseeing and landmarks' (32%) and 'hiking' (27%). Other popular activities include walking (21%) and visiting the Hot Pools (16%).

Table 3 – Participation in Park Activities by Quarter⁶

Activities	Estimated Number of Participants				2003 Total
	Jan-Mar	Apr-Jun	Jul-Sep	Oct-Dec	
Driving and Sightseeing	162,604	461,126	1,072,021	128,434	1,824,184
Eating in a Restaurant	273,702	380,541	685,059	194,987	1,534,288
Shopping	199,855	274,508	582,714	147,503	1,204,581
Sightseeing and Landmarks	97,207	280,141	631,263	90,233	1,098,844
Hiking	40,564	239,601	584,127	50,135	914,427
Relaxing	141,787	158,787	367,798	68,060	736,432
Walking	63,591	185,035	394,537	54,110	697,273
Visiting the Hot Pools	86,487	152,312	253,518	50,287	542,604
Eating Outside a Restaurant	66,896	138,393	304,734	30,542	540,565
Viewing Wildlife	42,426	172,618	264,151	36,936	516,131
Ride a Gondola	23,341	139,635	269,055	33,233	465,264
Participate in Other Recreation	73,524	108,255	207,163	47,688	436,629
Buying Gas	53,205	98,946	216,756	35,199	404,106
Visit a Museum or Historic Site	48,997	72,601	196,258	33,987	351,843
Downhill Skiing or Snowboarding	141,076	66,196	0	41,162	248,434
Education or Interpretation Program	11,935	44,765	146,172	6,061	208,933
Visiting with Others	55,589	53,831	64,980	20,347	194,746
Business or Conference	33,049	40,688	36,979	36,267	146,982
Canoeing and Kayaking	0	15,783	93,802	1,077	110,662
Horseback Riding	2,240	22,023	45,604	327	70,194
Taking a Boat Cruise	0	11,542	57,623	0	69,165
Cycling, Mountain Biking	2,240	12,949	38,733	655	54,576
Cross-Country Skiing	41,292	2,906	0	6,423	50,621
Rafting	1,312	14,945	33,484	0	49,741
Bird watching	0	20,514	27,167	327	48,009
Mountaineering	1,846	10,545	15,902	0	28,294
Backpacking	0	3,372	24,110	750	28,232
Fishing	0	8,683	10,882	0	19,565
Snowshoeing	12,326	367	1,320	0	14,012
Ice climbing	1,961	2,353	0	750	5,064

⁶ For some seasonal activities, the predicted number of participants is within the margin of error from 0. The margin of error varies by quarter. For January – March it is $\pm 8.2\%$, April – June $\pm 6.2\%$, July – September $\pm 6.6\%$, and for October – December $\pm 14.7\%$. For the entire year, the margin of error is $\pm 7.7\%$

Use of Visitor Nodes

The parks' largest townsites (Jasper, Lake Louise, and Banff) are the centres of visitor use. Table 3 shows that most visits to the Four Mountain Parks included at least one stop in the Banff Townsite (2.1 million visits, or 62%). The results show notable seasonal variation, reflecting different types of visitor opportunities.

Table 4 – Estimated Use of Visitor Nodes by Quarter

Jasper National Park Visitor Node:	Estimated Number of Visits that include Stops at Each Node				
	Jan-Mar	Apr-Jun	Jul-Sep	Oct-Dec	2003 Total
Miette/Pocahontas area	13,654	76,173	151,510	17,488	258,825
Maligne Lake	17,510	114,833	224,218	15,960	372,520
The Greater Jasper Townsite Area	103,910	312,708	680,828	94,790	1,192,236
Lakes Edith & Annette/ Jasper Park Lodge area	39,253	97,334	133,281	32,639	302,507
Maligne Canyon	28,822	105,750	192,540	19,721	346,833
The Jasper Townsite	85,606	281,836	622,214	84,115	1,073,771
Pyramid & Patricia Lakes	16,136	65,211	113,079	20,846	215,272
Old Fort Point	4,720	24,410	13,189	4,084	46,404
Whistlers	1,426	69,633	159,074	8,642	238,775
Marmot Basin	37,464	36,330	9,963	7,116	90,873
Mt. Edith Cavell	2,240	18,174	135,095	7,211	162,719
The Athabasca River and Falls	13,308	108,144	234,475	23,250	379,177
The Sunwapta River and Falls	1,990	55,095	109,582	9,389	176,056
The Columbia Icefield Centre area	2,116	151,785	400,290	30,417	584,609
Stops Along the Icefields Parkway	14,983	169,471	417,729	18,907	621,091
Stops Along the Yellowhead Highway	32,489	95,414	117,074	21,340	266,317

Banff National Park Visitor Node:	Estimated Number of Visits that include Stops at Each Node				
	Jan-Mar	Apr-Jun	Jul-Sep	Oct-Dec	2003 Total
The North Saskatchewan River	5,423	21,436	35,113	5,842	67,815
The Saskatchewan River Crossing	4,243	25,705	83,390	13,137	126,475
Bow Lake/Summit	12,667	61,932	161,250	11,998	247,847
The Greater Lake Louise Area	179,120	359,961	722,998	89,038	1,351,117
The Hamlet of Lake Louise	78,675	192,426	391,321	59,264	721,686
Moraine Lake and Upper Lake Louise	49,814	217,579	530,607	40,338	838,337
The Lake Louise Ski Area	118,403	100,881	118,394	23,416	361,094
Stops Along the Trans Canada Highway	129,034	186,404	356,243	59,320	731,001
Johnston Canyon/Bow Valley Parkway	33,952	158,869	385,393	27,073	605,288
Sunshine Meadows/Ski Area	156,943	70,553	12,678	35,566	275,741
The Bow River	14,971	62,502	132,622	18,948	229,044
The Greater Banff Townsite Area	333,519	543,134	990,040	260,085	2,126,778
The Banff Townsite	315,601	526,980	968,190	248,158	2,058,929
Mt. Norquay	43,756	29,023	39,871	15,187	127,837
The Minnewanka Loop	25,145	83,068	172,070	21,579	301,862

Table 4 (cont'd.) – Estimated Use of Visitor Nodes by Quarter

Kootenay National Park Visitor Node:	Estimated Number of Visits that include Stops at Each Node				2003 Total
	Jan-Mar	Apr-Jun	Jul-Sep	Oct-Dec	
Marble Canyon	11,697	34,953	45,750	0	92,401
The Paint Pots	2,240	25,926	33,411	0	61,576
Stops Along Highway 93 South	21,625	65,976	84,807	3,905	176,313
The Kootenay River	1,426	14,677	24,548	0	40,651
Radium Hot Springs	21,995	72,712	117,964	14,008	226,679

Yoho National Park Visitor Node:	Estimated Number of Visits that include Stops at Each Node				2003 Total
	Jan-Mar	Apr-Jun	Jul-Sep	Oct-Dec	
The Spiral Tunnels	513	38,621	91,926	3,824	134,884
The Takakkaw Falls area	944	8,374	151,445	0	160,762
The Village of Field	8,229	29,440	66,801	2,385	106,855
Emerald Lake	5,792	63,727	127,605	4,107	201,231
The Kicking Horse River	3,328	35,184	65,556	3,548	107,616
Other areas of Yoho National Park	3,946	25,999	76,590	5,454	111,988

Behavioural Segmentation of Mountain Park Visits

Participation rates (like those above) indicate current demand for each activity and node, but do not provide insights into visitors' patterns of use. The analysis below uses a segmentation approach to identify a manageable number of clusters that describe most of the variance in park activities. It finds four distinct types of visit to the parks that provide insight into the ways that visitors use the parks:

Habitual Visits - 39%

This is a visit that focuses on one main activity, often in one specific node. These types of visit occur throughout the year and tend to focus on one specific activity like hiking, skiing, snowboarding, mountain biking, or some other activity. Most visitors on this type of visit are Canadian, and they spend more than others for recreation, but less in restaurants or shops while in the parks.

Habitual Visits are characterized as follows:

- Local and regional market, high repeat, year-round
- Some single visitors
- Short stay (<2 nights)
- Less likely to stop at landmarks, museums, or historic sites; little wildlife viewing
- Often includes skiers
- Some interest in learning, but not as the prime motivation for visiting
- Satisfied with provision of opportunities

Getaway Visits – 34%

This is a short visit that includes a range of activities, often in multiple nodes. People on Getaway Visits tend to be from Canada and visit the Four Mountain Parks more frequently than the others. They often rely on their own past experience to guide their itinerary in the parks.

Getaway Visits are characterized as follows:

- Local and regional market, high repeat, year-round
- Shortest length of stay
- Less shopping, restaurants, sightseeing; very little wildlife viewing
- Interested in learning, but learning is not a prime motivation
- Very low participation in learning programmes, but the highest satisfaction with those that they used

Park Experience Visits – 12%

This is a longer visit that includes a range of activities in a range of visitor nodes. It is most common in the summer season, includes the longest visits to the parks, and the largest groups from the USA or Europe (often from Germany). These visits include the most frequent use of Parks Canada facilities and services. It is the most likely to stay in campgrounds and/or hostels, and least likely to stay in hotels. This visit type tends to include opportunities to learn about Canada's heritage and culture (education and interpretive programmes, museums and national historic sites). It includes activities with a vehicle (driving and sightseeing) and outside a vehicle (walking and hiking). Almost all eat at least one meal outside a restaurant (83%).

Park Experience Visits are characterized as follows:

- International visitors
- Summer time visits
- Long trips away from home
- Often first-time visitors
- Larger party sizes (four people)
- High participation in all activities, including sightseeing and wildlife viewing
- High interest in learning, would welcome more learning opportunities

Sightseeing Visits – 15%

Like Park Experience Visits, this is a longer visit that includes a range of activities in multiple nodes, but focuses more on indoor activities, driving, and gondolas. Many on this type of visit come from the USA and Europe (often from the UK or the Netherlands). Sightseeing Visits include opportunities to see the sights and the landmarks from their car or the gondola; view wildlife, birds, art, and heritage at galleries and museums; and enjoy the good life by shopping and eating in restaurants. Almost all eat at least one meal in a restaurant (90%).

Sightseeing Visits are characterized as follows:

- Often international visitors
- Year-round
- Part of a touring vacation

- Often first-time visitors
- Highest participation in sightseeing, wildlife viewing
- Highest interest in learning, would welcome more opportunities
- On their next holiday, they might choose to see another area of the world.

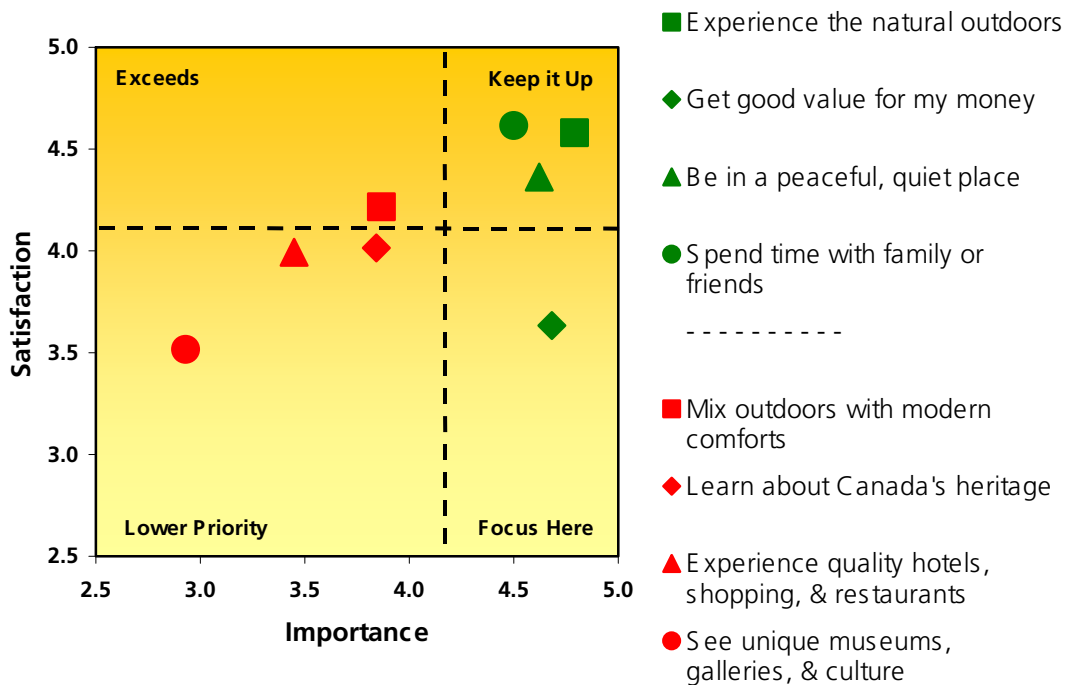
Independent Visitors - Satisfaction

Importance and Satisfaction

When they arrived, visitors indicated how important eight different visit opportunities were to their travel decision; then after their visit, they rated their satisfaction those same opportunities (1 = Not at all important/unsatisfied, 5 = Very important/satisfied).

The most important opportunities included 'Experiencing the natural outdoors' (mean 4.8), 'Getting good value for money' (mean 4.7), 'Being in a peaceful, quiet place' (mean 4.6), and 'Spending time with friends and family' (mean 4.5). Opportunities to 'See unique museums, galleries and culture' had the least importance (mean 2.9).

Figure 1 – Importance and Satisfaction Matrix for Independent Visitors



Comparing satisfaction and importance scores suggests whether or not visitors' expectations are being met. Ideally, if the mean importance scores are high, then the satisfaction scores should be equally high, or the results suggest that visitor expectations are

not being met. Figure 1 shows that the relationship between importance and satisfaction is generally in line.

The average satisfaction scores range from a high of 4.6 to a low of 3.5, with an average score of 4.1. These results suggest that independent visitors are generally satisfied with the most important opportunities. Some notable results include:

- ‘Getting good value for my money’ is an important opportunity with a below-average (but still quite good) satisfaction score, so may warrant further investigation; and
- ‘Mixing the natural outdoors with modern comforts’ isn’t why visitors choose to visit the Four Mountain Parks, but the opportunities they find are very good.

Satisfaction with Service

The questionnaire asked for respondents’ satisfaction with twenty other service attributes on the same five-point Likert scale. The highest ranked attributes included ‘My visit as a recreational experience’ (mean 4.7), ‘Friendliness of park staff’ (4.7) and ‘Service in official language of choice’ (4.6).

Table 5 - Satisfaction With Services and Opportunities

Service Attribute	Number of Visit Parties	Average
Friendliness of Parks Canada staff	2,972,921	4.66
My visit as a recreational experience	2,922,511	4.66
Service in official language of choice	1,837,264	4.64
Guided walks / tours	687,824	4.38
Friendliness of business staff in the parks	2,688,123	4.37
The Columbia Icefield Snocoach Tour	482,613	4.33
The “Mountain Guide” publication	1,430,150	4.32
History / geography info from the business staff in the parks	1,210,761	4.23
Quality of education / interpretive programs	1,016,517	4.22
Education / interpretive exhibits	1,354,270	4.22
Pre-trip print publications	1,161,515	4.19
My visit as an educational experience	1,712,357	4.17
Availability of education / interpretive programs	1,253,299	4.12
Parks Canada website	639,212	4.08
Travel Alberta website	540,828	3.96
Tourism BC website	272,054	3.88
Value for entrance fee	3,083,919	3.94
Value for money at attractions / activities in the parks	2,161,276	3.79
Value for money at hotels / motels in the parks	1,812,248	3.61
Value for money at restaurants in the parks	2,681,914	3.56

This part of the questionnaire explored visitors’ perceptions of value for money in four areas: entrance fee; attractions and activities; hotels and motels; and restaurants. The lowest score was with restaurants (3.6) and the highest was entrance fee (3.9).

Americans rated their satisfaction with the entrance fee with a mean of 4.3, while Albertans provided a mean score of 3.8.

Overall Enjoyment

Visitors were also asked to rate their overall enjoyment with their visit to the Four Mountain Parks. The response choices included:

- extremely enjoyable;
- somewhat enjoyable;
- not very enjoyable; and
- not at all enjoyable.

The majority indicated their visit was extremely enjoyable (81%) while 16% rated their visit as somewhat enjoyable. Almost no one (0.2%) rated his or her visit as 'not very enjoyable'.

Potential to Return

Almost three-quarters of the independent visitors indicated they 'definitely will' (50%) or 'probably will' (20%) plan another trip to the Four Mountain Parks area within the next two years. Only 15% said they 'probably will not' or 'definitely will not', leaving 15% undecided. Albertan (95%) and visitors from British Columbia (78%) are the most likely to come back to the parks, with 59% of other Canadians also indicating that they 'definitely will' (27%) or 'probably will' (32%) return in the next two years. Americans, Europeans, and visitors from other international origins follow them respectively.

Independent Visitors - Expenditures

The survey gathered expenditure information about spending while in the Four Mountain Parks. This study uses party visit spending – rather than per person visit or per person day – because research shows that recreational and tourism spending is generally thought to be attributable to costs incurred to generate a trip for a number of people. Families or groups of friends, and other related people are the typical traveling unit. While some costs, like airline tickets may be attributable to individuals, most costs, like accommodation, food, and auto-related costs are attributable to the party, not to individuals.

Total visitor spending by independent visitors in the Four Mountain Parks is estimated to be \$914,559,606, including \$355 million for accommodation, \$176.5 million for food and beverages from restaurants, and \$126.9 million for recreation.

The average visitor party spent \$692 while visiting the Four Mountain Parks.

Table 4 - Visit Party Expenditures

Expense Item	Average Party Visit Spending	Total Spending
Amount of money spent on this visit	\$691.62	\$914,559,606
Spending for recreation	\$95.97	\$126,910,768
Spending for accommodation	\$268.63	\$355,221,578
Spending for food & beverage from restaurants	\$133.49	\$176,523,141
Spending for food & beverage from stores	\$34.40	\$45,487,087
Spending for other retail items	\$54.94	\$72,646,090
Spending for operating a vehicle	\$38.10	\$50,378,360
Spending for renting a vehicle	\$37.35	\$49,394,080
Spending for local transportation	\$1.88	\$2,484,036
Spending for other things	\$26.86	\$35,514,468

Analysis of spending by segment indicated that the ‘Park Experience’ and ‘Sightseeing Visit’ segments spent the most at \$983 and \$921 respectively (per party average). The ‘Getaway’ and ‘Habitual’ segments recorded average per party expenditures of \$636 and \$563 respectively. The main differences between the higher spending segments and lower spending segments are in accommodation spending, vehicle operation and vehicle rentals.

Party visits in July through September were the highest in terms of spending with the overall average being \$805 per party visit. The biggest differences were in accommodation and grocery spending.

Overnight visitors spent almost four times as much as day visitors. This is mainly due to their longer stay, the use of accommodation and restaurants.

Differences are also noted in spending according to origin. Alberta and British Columbia visitor parties spent the least (\$403 and \$427 respectively). Other Canadians spent an average of \$783 per party visit, while Americans, Europeans and other overseas visitors spent more than \$1000 per party visit on average (American \$1,041; European \$1,249; other overseas \$1,093). The most prevalent factors in the spending differences by origin are the cost of accommodation, vehicle rentals and restaurant spending.

Independent Visitors – Heritage Theme Recognition

Parks Canada's mandate includes the provision of opportunities for visitors to learn about the unique cultural and natural heritage of these protected areas. Visitors can receive messages about the parks and their heritage through interpretive programs, displays and panels, information brochures, and many other information sources.

To develop a baseline measure of the effectiveness of these programs, respondents were presented with twelve true/false statements that reflect key messages Parks Canada hopes to communicate with its visitors. Four of these statements applied to all the Mountain Parks, with an additional two statements being specific to each Park. Monitoring visitor recognition of key heritage themes will help the Agency to understand the effectiveness of its programmes.

On average, respondents correctly identified 2.4 of the four statements common to all the Parks⁷, including:

- 17% who answered one or less of the questions correctly;
- 34% who answered two correctly;
- 42% who answered three correctly; and
- 7% who answered all four correctly.

North American visitors scored the lowest (2.3 correct), including 18% who answered one or fewer questions correctly. International visitors did better (2.5 correct for Europeans, 2.6 correct for those from other international origins). These scores may reflect the different reasons for visiting the Parks in the first place, as international visitors rated interest in learning about Canada's natural and historic heritage more highly as a motive to visit than did North Americans.

There was no significant difference between day and overnight visitors.

Parks Canada plans to use these survey results to develop new heritage education opportunities that better reflect visitor itineraries and interests.

⁷ Answers were only scored as correct if the proper 'true' or 'false' answer was indicated. Unanswered questions, or 'Not Sure' responses were scored as incorrect. A response was only considered to be 'Missing' (and excluded from the results) if no items were answered.

Group Tours – Profile of Visitors

Over 7,700 tour groups entered the Four Mountain Parks in 2003, carrying 221,532 visitors. This figure includes tours that stopped at the Columbia Icefield Centre during its operating season (April to October), and the Banff Gondola during the rest of the year⁸.

The decline in Canada’s international arrivals in 2003 had a notable impact on the group tour business: the number of group tour visitors in the Four Mountain Parks was down 45% from the four-year average. Over this period, all visitor origins decreased in visitors except for Korea, which was up 37% from 1999. The largest decline has been with tour groups from Japan and China (including Taiwan).

Origin

Despite the decline, visitors from Asia represent the largest segment of group tour visitors to the Four Mountain Parks (46%, or just over 100,000 visitors)

In Q2 (April to June), European group tour visitors outnumber those from Asia.

Table 7 – Origin of Group Tour Visitors

Country of Residence	Number of Visitors	Percent
U.S.	48,353	21.8%
China/ Taiwan	40,810	18.4%
Japan	32,601	14.7%
Korea	26,896	12.1%
U.K.	25,419	11.5%
Canada	19,614	8.9%
Other Europe	13,632	6.2%
Australia/New Zealand	8,056	3.6%
Other International	5,420	2.4%
Other Asia	731	0.3%
Total	221,532	100.0%

⁸ Please note that this total does **not** include **all** tour groups to the Four Mountain Parks. Tours that visited neither the Banff Gondola nor the Columbia Icefield Centre are not represented in these findings. The sample was limited to these two locations to ensure that the survey represented a known population, and that the likelihood of selection for each tour could be calculated. Past research – and stakeholder consultation – suggests that almost all commercial group tour activity includes these two nodes.

Day/Overnight Visits

Most group tours to the Four Mountain Parks were multiple day trips with only 23% being day visits.

Length of Stay in the Four Mountain Parks

On average, the overnight group tour visitors spent 2.7 nights in the Four Mountain Parks.

Group visitors from China, Taiwan, and Korean spent the fewest nights (1.4), those from Japan spent, one more (2.4) while Americans and Europeans spent the greatest number of nights in the parks (3.5 and 3.6 nights respectively).

Group Size

The average group tour had 29.7 passengers (not including paid staff).

Group Tour Visitors – Profile of Visits

First-time Visitors

For most group visitors, this was their first trip to the Four Mountain Parks. For those who had visited the parks before, most had not visited in 2001 or 2002.

Entrance and Exit from Canada

Most international group tours entered Canada via airplane (88%). Just over half came directly from other international origins (56%) while 34% came directly from the USA.

Vancouver International Airport was the most common route into Canada (64%), followed by the Calgary International Airport (15%). The Vancouver International Airport was also the most common method of exiting Canada (68%), again followed by the Calgary International Airport (16%).

Gateway Communities

Calgary, Kamloops, and Golden were often the last overnight community before entering the Parks.

International visitors often spent their first and/or last night in Vancouver upon arrival to or departure from Canada.

Table 8 – Nights Spent in Selected Alberta Communities

Alberta Communities			
Community	Avg. Nights Spent ⁹	Est. Number of Visitors	Est. Number of Visitor Nights
Calgary	1.26	42,929	53,980
Canmore	1.57	14,962	23,558
Lethbridge	3.16	1,979	6,247
Edmonton	1.21	4,727	5,704
Kananaskis Country	1.77	3,073	5,429
Hinton	1.00	5,337	5,337
Waterton Lakes	2.00	369	738
Red Deer	2.00	369	738
Medicine Hat	1.00	450	450
Other Alberta	1.48	3,082	4,569

Table 8 (cont'd.) – Nights Spent in Selected British Columbia Communities

British Columbia Communities			
Community	Avg. Nights Spent	Est. Number of Visitors	Est. Number of Visitor Nights
Kamloops	1.13	32,075	36,251
Golden	1.14	27,488	31,240
Victoria	1.57	13,245	20,829
Kelowna/Okanagan	1.14	16,788	19,166
Other Vancouver Island	1.76	7,805	13,722
Valemont/McBride	1.02	11,864	12,133
Radium/Invermere	1.00	5,765	5,765
Prince George	1.37	3,655	5,006
Revelstoke	1.04	4,104	4,285
Kimberly/Cranbrook	1.00	369	369
Other B.C.	1.23	18,821	23,244

⁹ This is the average number of nights for those who reported staying in a community. Those who did not stay in a community were not included in the calculation.

Accommodation in the Four Mountain Parks

There were 161,367 group tour visitors to the Four Mountain Parks having overnight stays in the Four Mountain Parks included in their tour package. With an average length of stay of 2.7 nights, there were 435,692 prepaid visitor-nights spent in the Four Mountain Parks.

An additional 15,025 group tour visitors reported out-of-pocket spending for accommodation within the Four Mountain Parks, adding an additional 24,490 visitor-nights being spent in the park.

In all, 168,751 group tour visitors spent a total of 460,182 person nights.

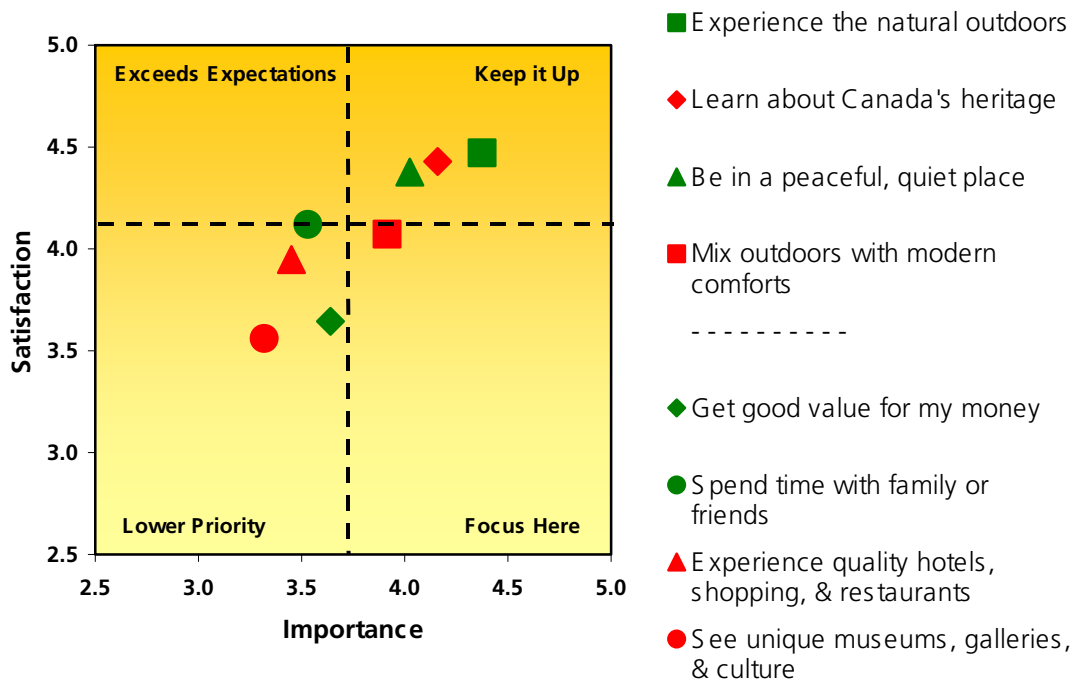
Group Tour Visitors – Satisfaction

Importance and Satisfaction

Visitors indicated the importance of eight different visit opportunities to their travel decision, then rated their satisfaction with those same opportunities (1 = Not at all important/unsatisfied, 5 = Very important/satisfied). All eight opportunities had satisfaction mean scores above 3.0. Group tour visitors rated all items as being significantly less important than independent visitors, except for 'Learning about Canada's natural and historic heritage' and 'Seeing unique museums, galleries, and culture.'

Visitors from all origins were most satisfied with opportunities to 'Learn about Canada's heritage,' 'Experience the natural outdoors,' and find 'Peace and quiet' – all were included in their top three opportunities. Visitors from all origins report that opportunities to 'Experience the natural outdoors' were most important.

Figure 2 – Importance and Satisfaction Matrix for Group Tour Visitors



Visitors were satisfied with these opportunities... with mean scores above 3.0 for all items, and above 4.0 for most.

Satisfaction with Service

The questionnaire asked for respondents' satisfaction with nineteen other service attributes on the same five-point Likert scale. The highest ranked attributes included the 'Columbia Icefield Snocoach tour' (mean 4.6), 'Guided walks and tours' (4.6), and 'Friendliness of park staff' (4.5).

This part of the questionnaire explored visitors' perceptions of value for money in three areas: attractions and activities; hotels and motels; and restaurants. The lowest score was with restaurants (3.7) and the highest was attractions and activities (4.0).

Table 9 – Satisfaction With Services and Opportunities

Service Attribute	Number of Visitors	Average
The Columbia Icefield Snocoach Tour	139,838	4.64
Guided walks / tours	121,752	4.59
Friendliness of Parks Canada staff	135,287	4.52
My visit as a recreational experience	144,887	4.52
My visit as an educational experience	121,963	4.47
Friendliness of business staff in the parks	138,198	4.46
Quality of education / interpretive programs	85,191	4.44
Parks Canada website	30,219	4.41
Service in official language of choice	98,800	4.24
History / geography info from the business staff in the parks	99,159	4.23
Tourism BC website	18,832	4.19
Education / interpretive exhibits	79,280	4.11
Travel Alberta website	16,915	4.09
The "Mountain Guide" publication	57,174	4.08
Availability of education / interpretive programs	83,527	4.08
Value for money at attractions / activities in the parks	108,093	4.04
Pre-trip print publications	74,078	4.02
Value for money at hotels / motels in the parks	113,986	3.98
Value for money at restaurants in the parks	130,504	3.71

Overall Enjoyment

Most group visitors enjoyed their visit to the Four Mountain Parks. On a four-point scale measuring the level of enjoyment, all origins had a mean score of 3.75 or higher. Europeans had the highest overall score (3.95), followed by Americans, other international visitors, Asians, and Canadians respectively.

Potential to Return

Most Group Visitors indicated they 'probably will not' or 'definitely will not' plan another trip to the Four Mountain Parks area within the next two years (36). Twenty-nine percent (29%) said they 'probably will' or 'definitely will', leaving 35% undecided. Asian and Canadian group tour visitors are the most likely to come back to the parks (both at 39%). Europeans, visitors from other international origins, and Americans follow them respectively.

Group Tour Visitors – Expenditures

Of the attractions and services included in the tour, most tour groups included admission to the parks and the Banff Gondola.

Participants in the tours were asked to identify the amount they as an individual had spent on their trip to the parks. The expenditures were for items not included or prepaid in the tour package. They were then asked to indicate what percent of that total they spent on various activities. Asian tour visitors had the highest total expenditures of the origin segments at \$25.7 million.

Table 10 – Group Tour Visitor Out-of-Pocket Expenditures

	Average Tour Passenger Spent	Total Spending
Amount of out-of-pocket spending on this visit	\$310.87	\$68,640,514
Spending for food & beverage from restaurants	\$79.43	\$17,538,427
Spending for other retail items	\$78.33	\$17,294,381
Spending for recreation	\$56.06	\$12,377,266
Spending for accommodation	\$34.84	\$7,691,764
Spending for food & beverage from stores	\$28.98	\$6,397,985
Spending for other things	\$26.87	\$5,933,470
Spending for renting a vehicle	\$2.54	\$561,264
Spending for local transportation	\$2.03	\$448,804
Spending for operating a vehicle	\$1.80	\$397,152

Americans were second in total spending, followed by Europeans, Canadians, and other international origins respectively. Asians spent most of their money on food and beverages from restaurants and on recreation. Americans spent most of their money on retail items and food and beverages from restaurants. Europeans spent most of their money on food and beverages from restaurants and on recreation.

Canadians spent their money on food and beverages from restaurants and on retail items. Other international visitors spent their money mostly on food and beverages from restaurants and accommodation.

European group tour visitors had the highest average per person expenditures (\$512) followed by Americans (\$476), other international visitors (\$432), Asians (\$416) and Canadians (\$323). The overall average per person expenditure was \$435.

Information about pre-paid expense items (occurring during the time spent in the Parks) associated with group tour activity was collected from the tour leaders (escorts) during the intercept interview. This information (the number of accommodation nights, meals, and recreational activities included in the tour packages) used to calculate the following expense estimates. These pre-paid expense items almost equal the total out-of-pocket expenses reported by tour group visitors.

Table 11 – Group Tour Visitor Pre-paid Expenses

Pre-paid Expense item¹⁰	Total Expenses
Total pre-paid expenditures	\$66,722,887
Accommodation (pre-paid)	\$41,507,448
Food (pre-paid)	\$16,283,861
Recreation (pre-paid)	\$8,931,578

¹⁰ Expenditures linked to the operation of tours (bookings, diesel, and the maintenance of vehicles) were not included.

Group Tour Visitors – Heritage Theme Recognition

The questionnaire asked visitors true and false questions about the Four Mountain Parks. On average, respondents correctly identified 2.2 of the four statements common to all the Parks, including:

- 20% who answered one or less of the questions correctly;
- 43% who answered two correctly;
- 32% who answered three correctly; and
- 5% who answered all four correctly.

Those from the United Kingdom (2.5) scored significantly higher than North Americans (2.3) and other international visitors (2.0).



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