



Summer Indexperience – 2008

Banff National Park

Final report

By :  **Zins Beauchesne and Associates**
MARKETING ■ DEVELOPMENT ■ INNOVATION



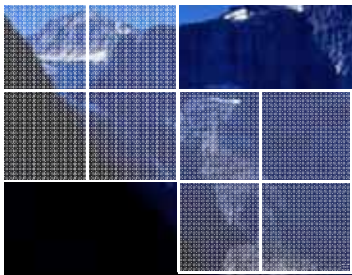


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Context and Methodology



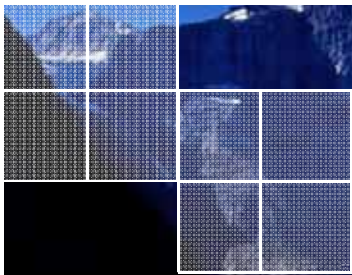
Context

- The Indexperience benchmark is a tool designed to measure the experience offered by a tourist destination and the perceived / felt experience by the leisure visitor.
- This evaluation method of the tourist experience was developed by **Zins Beauchesne and Associates** on behalf of **Tourisme Montréal** and adapted to the specific context of the Town of Banff, Village of Lake Louise and the National Park and outdoors environment.
- In 2005, the Indexperience benchmark won the Tourism Research Grant awarded by the Travel Tourism Research Association (TTRA).



The Indexperience benchmark : understanding the tourist experience

- The Town of Banff and Village of Lake Louise experience is composed of 10 dimensions which correspond to the added value felt by the tourist. These dimensions comprise 35 items regarding perceptions, experience and organisation of the stay.
- The Banff National Park experience is composed of 9 dimensions for a total of 26 items.
- The Indexperience benchmark is based on a set of conformity indicators and perception indicators, summarized in an index of the tourist experience:
 - Conformity indicators measure the density of the tourist offer and characteristics of an environment and its population according to the items reflecting the dimensions of the tourist experience. These indicators are objective and numbered data coming from existing documents.
 - Regarding perception indicators, the methodology consists of conducting a web survey with Banff National Park leisure visitors, once their experience is finished, in order to measure their perception toward their experience.



The Tourist Experience Dimensions

Added-value dimensions

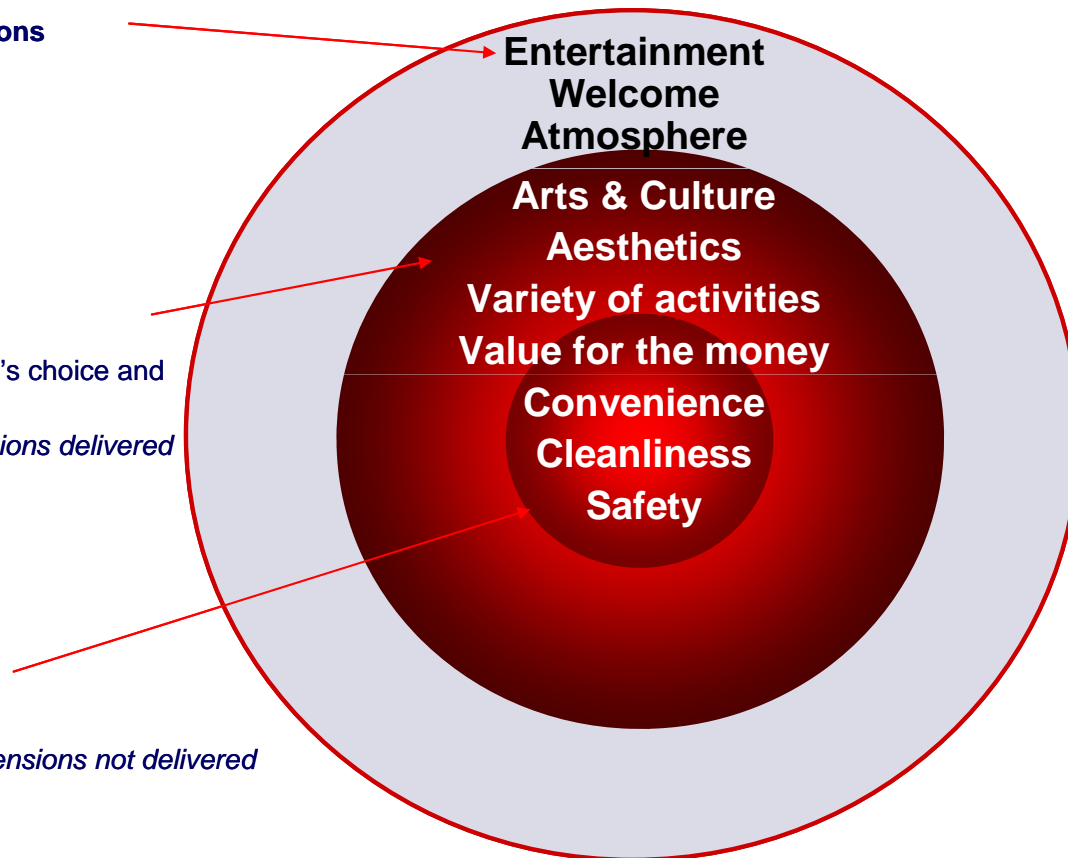
- The « Wow » effect
- Differentiation
- Marketing positioning
- *Impact on loyalty*

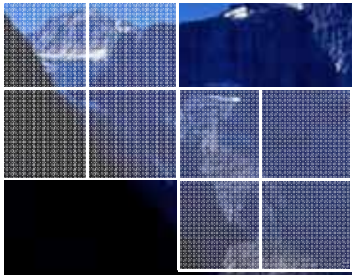
Essential dimensions

- Impact on destination's choice and attraction
- *Satisfaction if dimensions delivered*

Basic dimensions

- Basic expectations
- *Dissatisfaction if dimensions not delivered*






Web Survey Methodology

- Visitors' e-mail addresses were collected from Banff tourist offices and major attractions from mid-June to mid-September 2008.
- Of the 2196 valid e-mails that were sent, **927 questionnaires** were completed, which corresponds to a response rate of **42.2%**.
- The margin of error for 927 respondents is +/- 3,2 %, with a confidence interval of 95%.

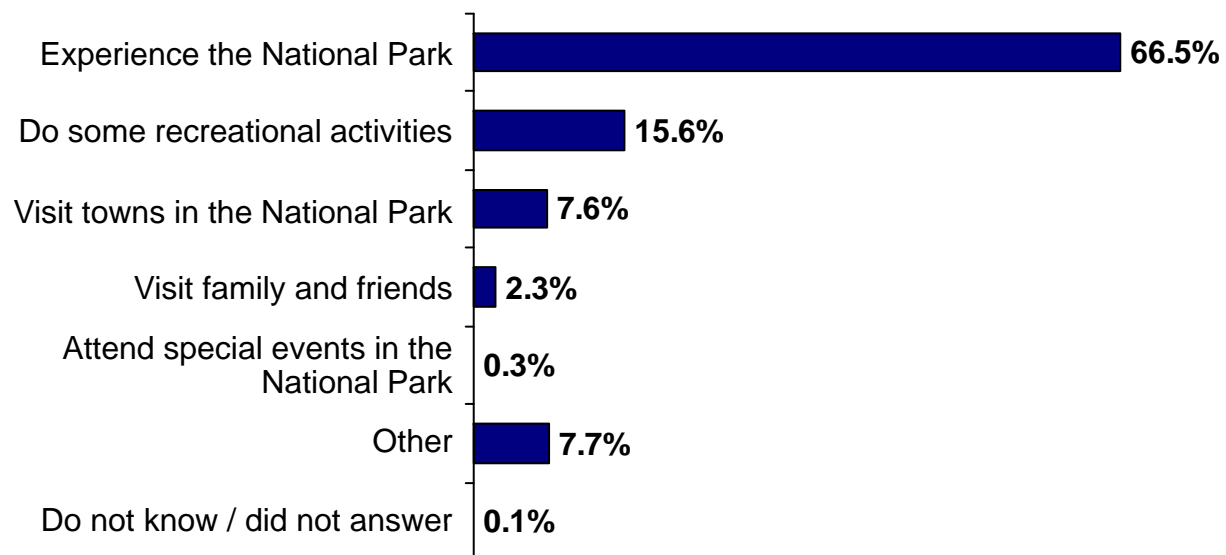


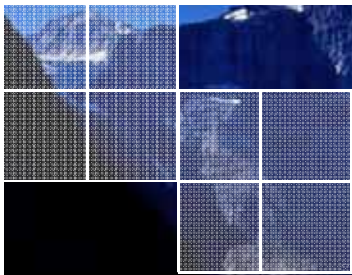
Context of the Trip to Banff National Park



*The main reason to go to Banff National Park
was to experience the National Park*

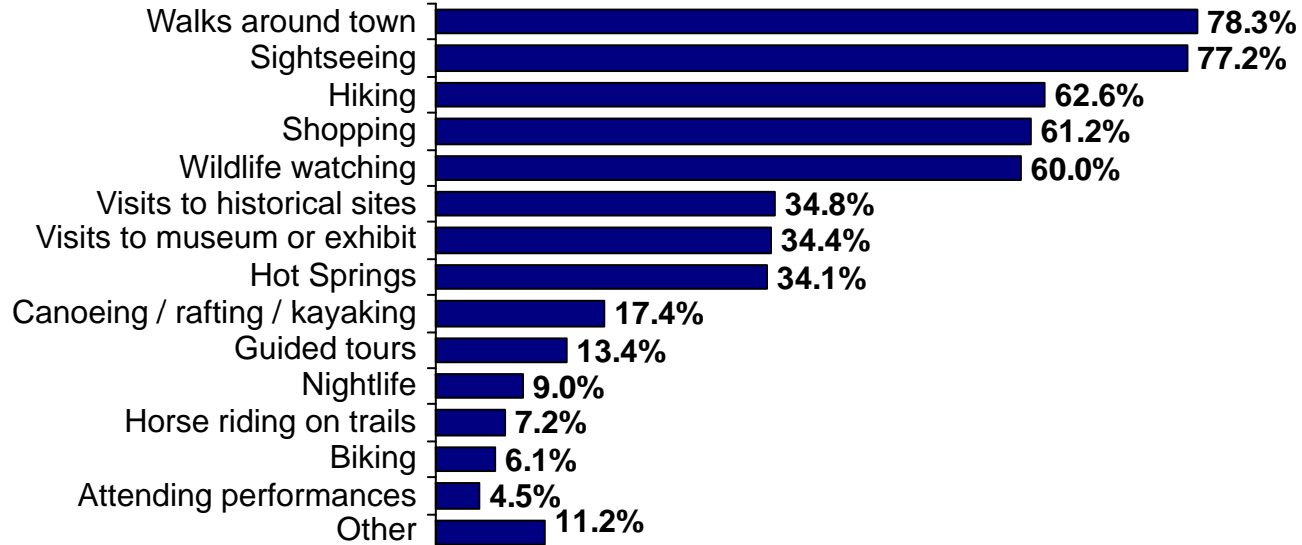
What was your main reason to go to Banff National Park?

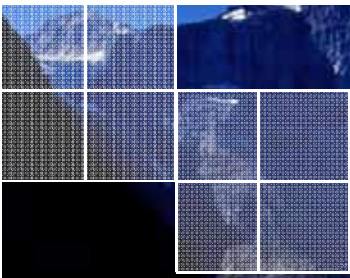




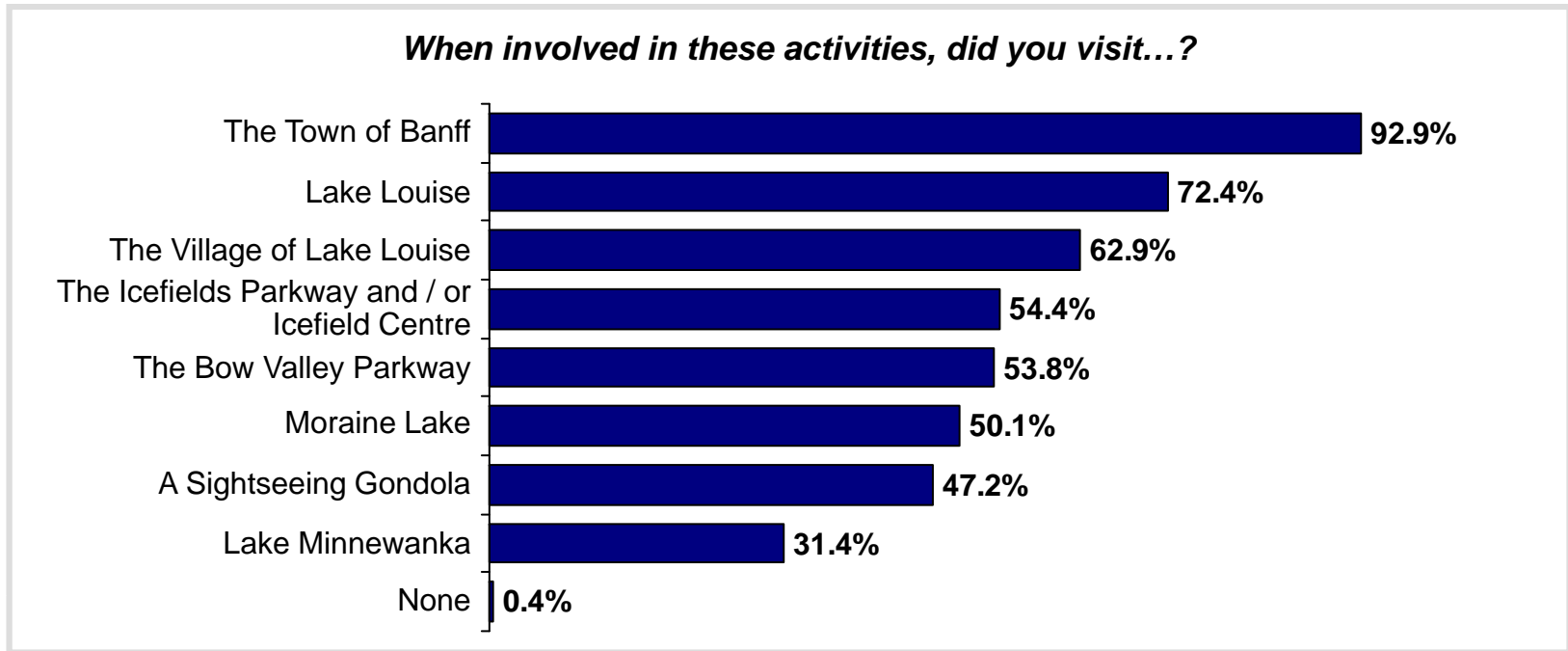
Visitors participated in various activities, especially walks around town, and sightseeing

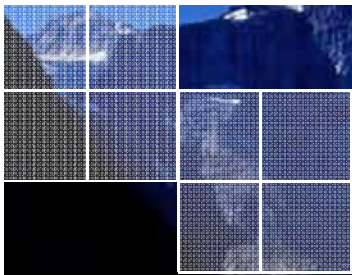
Which activities did you undertake during your trip to Banff National Park?





The Town of Banff was visited by the vast majority of respondents and almost three quarters went to Lake Louise as well





The majority of visitors are very satisfied with their visit to Banff National Park and outdoor activities

- Visitors in June are more satisfied with outdoor activities and the experience in the Village of Lake Louise.

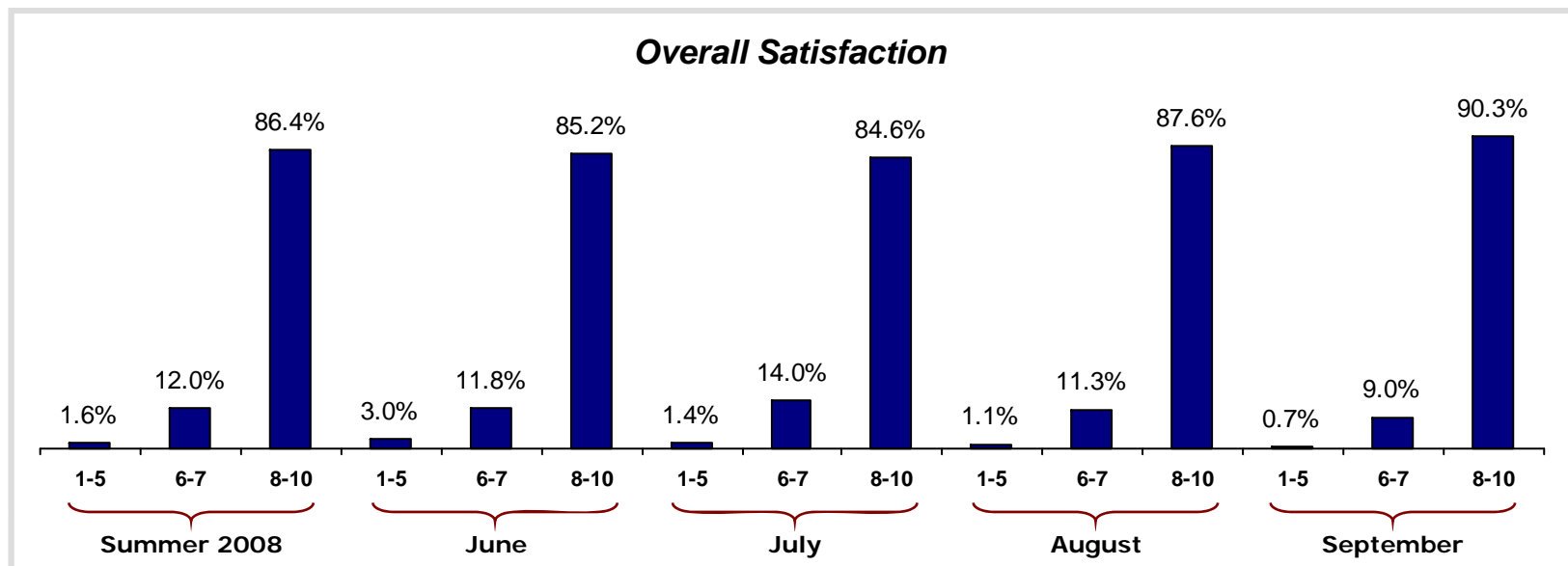


% of tourists who answered the question



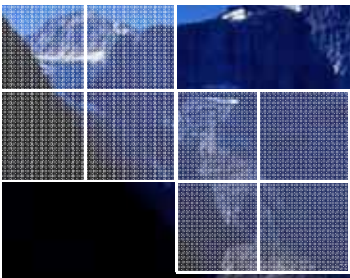
A very high overall satisfaction

- The majority of respondents gave an overall satisfaction score of 8 and over, out of 10.
- The average score is 8.63 on a scale from 1 to 10.



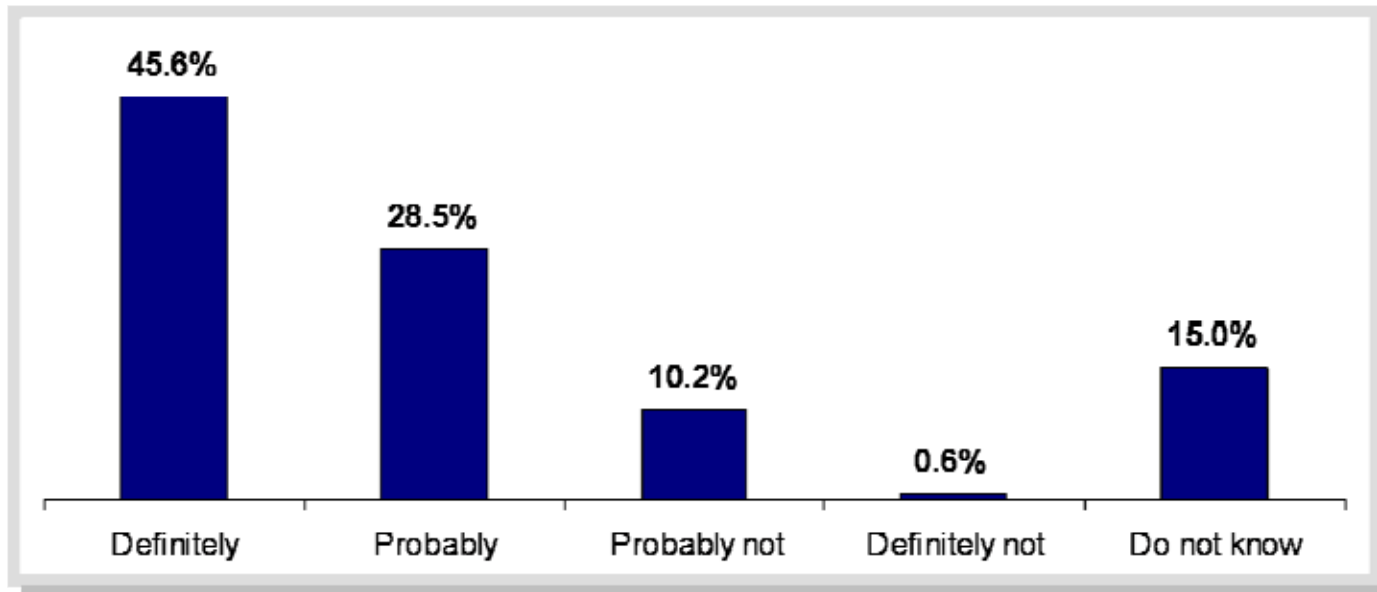


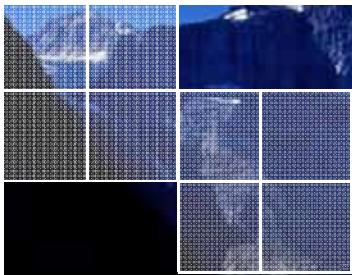
Impact of the Experience on Plans to Return and Recommendations to Family and Friends



Almost three quarters of the respondents plan to go back to Banff National Park in the next five years

Do you plan to come back to Banff National Park in the next 5 years?

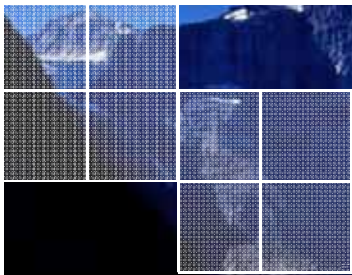




Over half of Canadians and Americans plan to go back to Banff National Park in the next five years

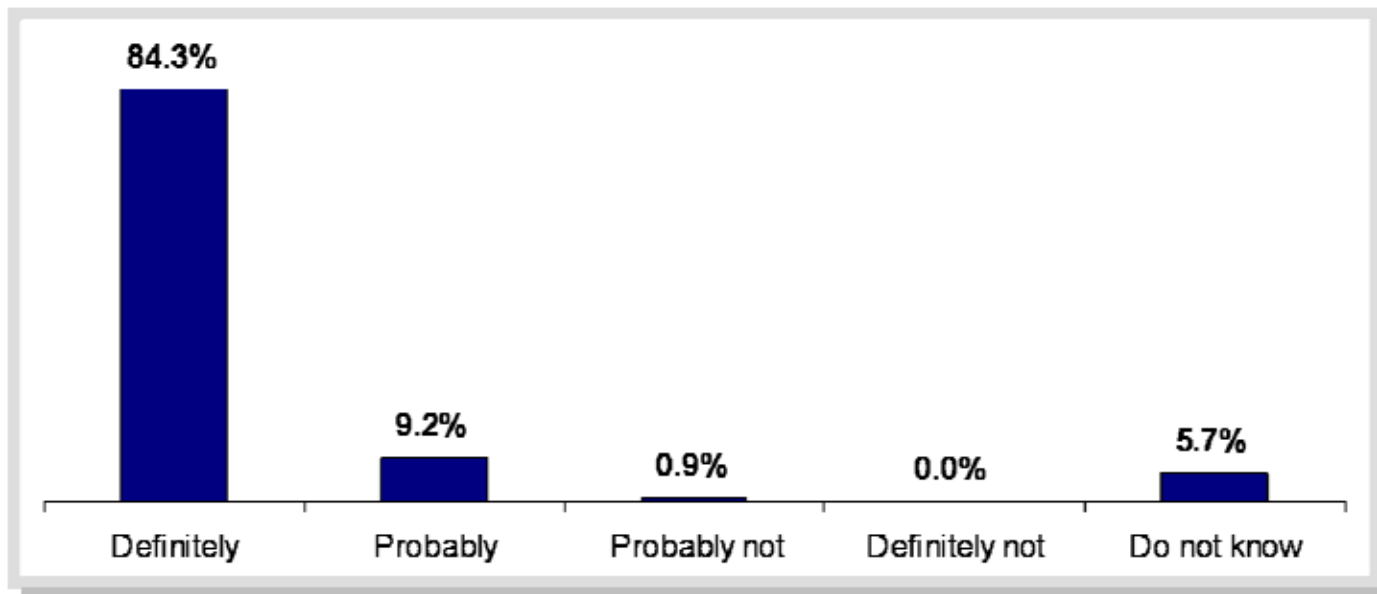
Do you plan to come back to Banff National Park in the next 5 years?

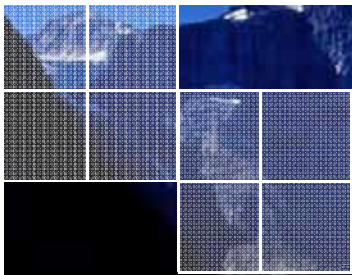
	Regional	Other Canada	USA	International
Definitely	73.7%	38.8%	23.8%	17.3%
Probably	18.9%	35.5%	34.1%	37.0%
Probably not	1.1%	6.6%	20.6%	18.5%
Definitely not	0.3%	1.7%	0.0%	1.7%
Do not know	6.0%	17.4%	21.5%	25.4%



A very high proportion of people would recommend a visit to Banff National Park to their family and friends

Would you recommend a visit to Banff National Park to your family and friends?





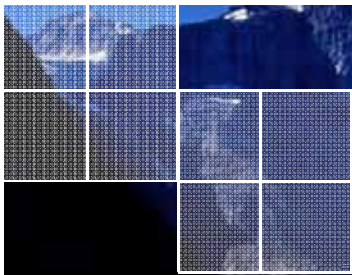
The majority of tourists would recommend a visit to Banff National Park to their family and friends no matter where they reside

Would you recommend a visit to Banff National Park to your family and friends?

	Regional	Other Canada	USA	International
Definitely	81.9%	87.6%	84.8%	86.1%
Probably	11.2%	4.1%	8.5%	9.2%
Probably not	1.4%	2.5%	0.0%	0.0%
Definitely not	0.0%	0.0%	0.0%	0.0%
Do not know	5.5%	5.8%	6.7%	4.6%

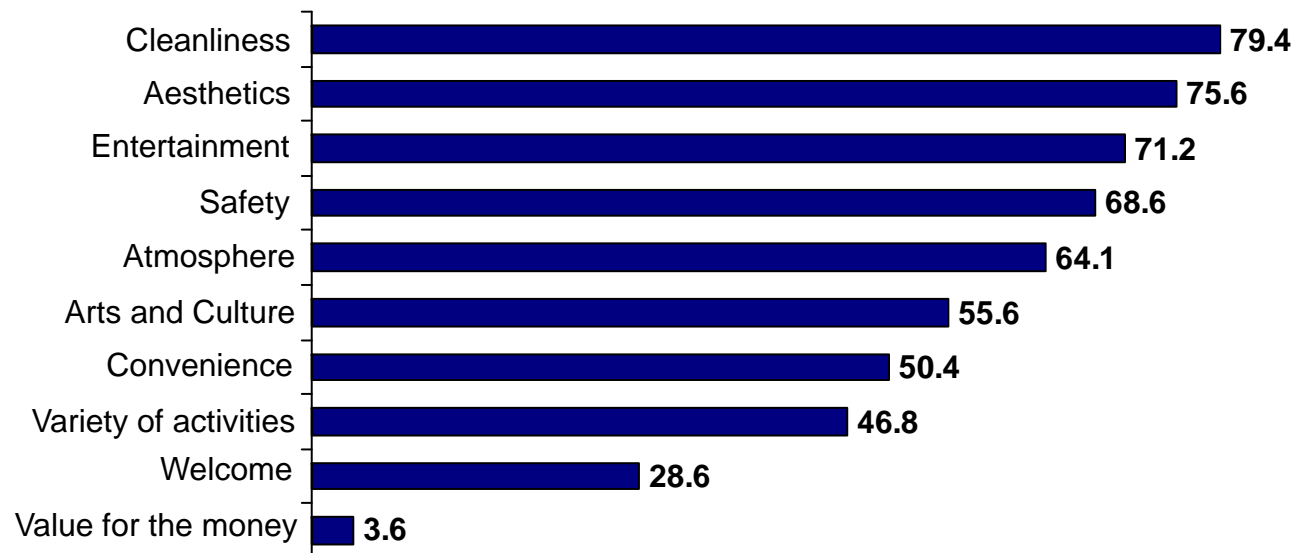


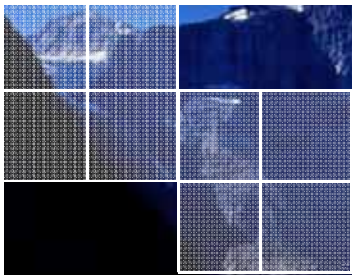
The Town of Banff Experience Perception by Respondent Profile



The strengths of the Town of Banff experience are Cleanliness, Aesthetics and Entertainment while the weaknesses are Value for the Money and Welcome

Summary of Satisfaction Indexes for the Town of Banff





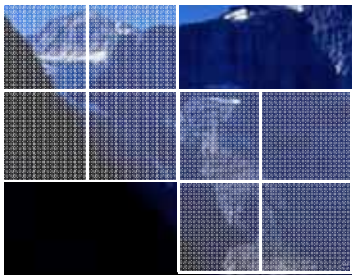
Entertainment in the Town of Banff

- For entertainment, women's perception is more positive

Experience Perception according to Profile

Dimension : Entertainment		Totally agree %	Disagree %	Index
Overall		73.7	2.5	71.2
Gender	Male	70.2	2.7	67.5
	Female	77.3	2.3	75.0
Age	18-34	75.2	2.3	72.9
	35-54	75.0	3.4	71.5
	55 +	72.0	0.7	71.3

Note : These data were obtained by computing, for each dimension, the mean of the items weighted according to their importance
 The Index is calculated by subtracting the % of dissatisfied from the % of very satisfied in order to reduce the analysis to one data point.

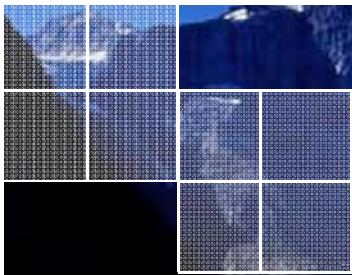


Entertainment in the Town of Banff

- For entertainment, residents of Western Canada and Americans have a more positive perception

Experience Perception according to Profile

Dimension : Entertainment		Totally agree %		Disagree %	Index	
Residence	Regional	76.3			2.2	74.2
	Other Canada	69.2			4.0	65.2
	USA	76.5			3.2	73.3
	International	67.3			1.3	66.0
Trip type	Day trip	66.9			2.7	64.1
	Overnight stay	74.0			2.5	71.6

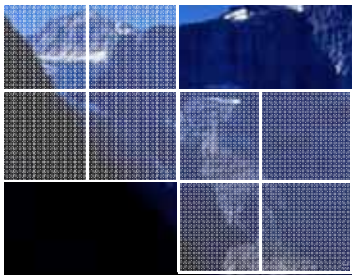


Welcome in the Town of Banff

- The Town of Banff's welcome is perceived more positively by women and people aged 55 years old and over

Experience Perception according to Profile

Dimension : Welcome		Totally agree %		Disagree %	Index
Overall		43.2			28.6
Gender	Male	39.7			23.3
	Female	46.1			33.3
Age	18-34	40.5			23.1
	35-54	41.3			27.5
	55 +	47.8			34.3

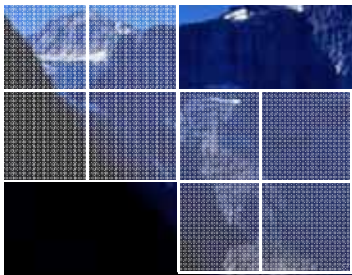


Welcome in the Town of Banff

- Canadians (except the West) and Americans are more appreciative of the welcome in the Town of Banff

Experience Perception according to Profile

Dimension : Welcome		Totally agree %	Disagree %	Index
Residence	Regional	39.2	15.6	23.6
	Other Canada	48.4	16.4	31.9
	USA	47.3	15.1	32.2
	International	39.2	13.3	25.9
Trip type	Day trip	29.4	9.5	19.9
	Overnight stay	44.0	14.9	29.0

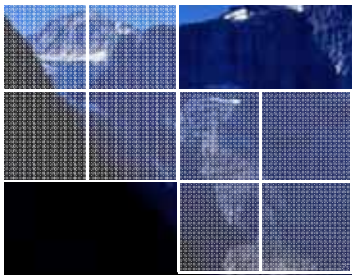


Atmosphere in the Town of Banff

- Women perceive the Atmosphere dimension more positively

Experience Perception according to Profile

Dimension : Atmosphere		Totally agree %	Disagree %	Index
Overall		67.6	3.5	64.1
Gender	Male	63.9	3.3	60.6
	Female	70.3	3.7	66.6
Age	18-34	67.3	3.5	63.8
	35-54	68.9	3.6	65.4
	55 +	66.4	3.5	62.9



Atmosphere in the Town of Banff

- In terms of atmosphere, the perception does not vary according to residence

Experience Perception according to Profile

Dimension : Atmosphere		Totally agree %	Disagree %	Index
Residence	Regional	67.9	3.1	64.9
	Other Canada	68.1	6.5	61.6
	USA	68.4	3.8	64.5
	International	64.7	2.3	62.4
Trip type	Day trip	58.1	4.0	54.1
	Overnight stay	68.2	3.5	64.7

Arts and Culture in the Town of Banff

- Women and people aged 35 to 54 years old perceive the Arts and Culture dimension more favourably

Experience Perception according to Profile

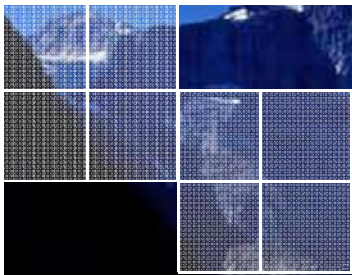
Dimension : Arts and Culture		Totally agree %	Disagree %	Index
Overall		60.6	5.0	55.6
Gender	Male	54.5	5.7	48.8
	Female	64.5	4.1	60.4
Age	18-34	56.8	6.3	50.5
	35-54	63.2	3.6	59.5
	55 +	60.6	4.6	56.0

Arts and Culture in the Town of Banff

- A higher proportion of residents of Western Canada appreciate the arts and culture in the Town of Banff

Experience Perception according to Profile

Dimension : Arts and Culture		Totally agree %	Disagree %	Index
Residence	Regional	63.8	3.4	60.4
	Other Canada	55.0	7.0	48.0
	USA	59.2	6.9	52.4
	International	56.1	5.3	50.8
Trip type	Day trip	57.7	0.0	57.7
	Overnight stay	60.8	5.4	55.5

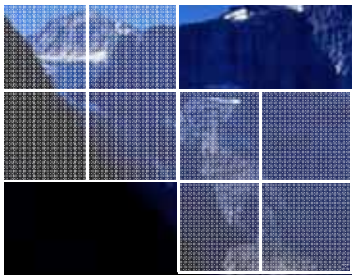


Aesthetics in the Town of Banff

- Women and people aged 55 years old and over have a more positive perception of aesthetics in the Town of Banff

Experience Perception according to Profile

Dimension : Aesthetics		Totally agree %	Disagree %	Index
Overall		77.9	2.3	75.6
Gender	Male	71.8	2.0	69.8
	Female	82.8	2.1	80.7
Age	18-34	78.0	2.5	75.5
	35-54	77.1	2.2	74.9
	55 +	81.5	1.6	80.0

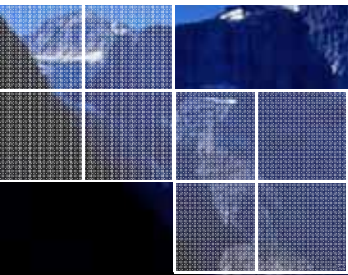


Aesthetics in the Town of Banff

- International tourists are less appreciative of the Town of Banff's aesthetics

Experience Perception according to Profile

Dimension : Aesthetics		Totally agree %		Disagree %	Index	
Residence	Regional	77.9			1.5	76.3
	Other Canada	77.8			3.2	74.6
	USA	80.6			3.6	76.9
	International	71.6			1.2	70.3
Trip type	Day trip	73.9			1.0	72.9
	Overnight stay	78.1			2.3	75.7

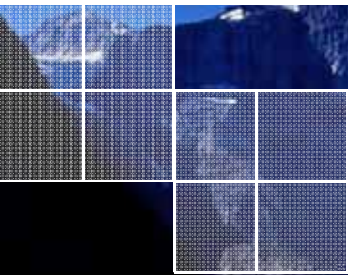


Variety of Activities in the Town of Banff

- Women are more appreciative of the variety of activities offered in the Town of Banff

Experience Perception according to Profile

Dimension : Variety of activities		Totally agree %	Disagree %	Index
Overall		54.1	7.3	46.8
Gender	Male	49.1	8.3	40.8
	Female	57.8	6.1	51.7
Age	18-34	55.9	7.7	48.2
	35-54	53.2	7.2	46.0
	55 +	53.1	6.0	47.1

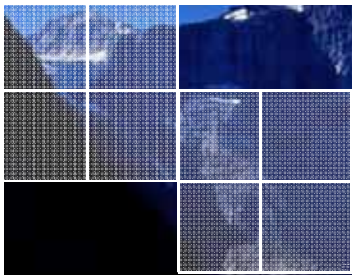


Variety of Activities in the Town of Banff

- Americans have a slightly better perception of the variety of activities

Experience Perception according to Profile

Dimension : Variety of activities		Totally agree %		Disagree %	Index
Residence	Regional	53.3		7.9	45.5
	Other Canada	52.9		8.4	44.4
	USA	56.0		7.1	48.9
	International	51.3		6.2	45.1
Trip type	Day trip	49.2		7.8	41.4
	Overnight stay	54.4		7.3	47.2

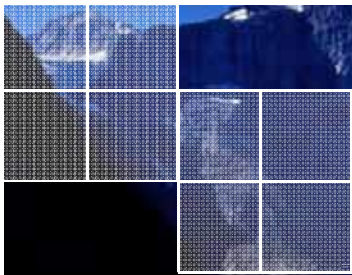


Convenience in the Town of Banff

- Women and people aged 55 years old and over perceive the Convenience dimension more positively

Experience Perception according to Profile

Dimension : Convenience		Totally agree %	Disagree %	Index
Overall		59.7	9.2	50.4
Gender	Male	56.8	9.0	47.8
	Female	61.8	9.5	52.3
Age	18-34	59.1	10.7	48.4
	35-54	58.2	8.7	49.5
	55 +	62.4	8.0	54.5

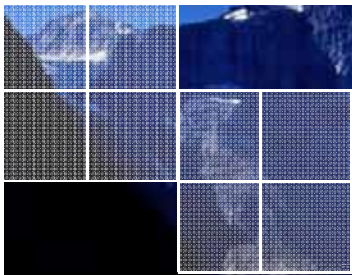


Convenience in the Town of Banff

- There are no significant differences in perception of the Convenience dimension according to residence

Experience Perception according to Profile

Dimension : Convenience		Totally agree %		Disagree %	Index
Residence	Regional	57.6		10.4	47.3
	Other Canada	59.4		8.7	50.8
	USA	60.7		9.8	50.8
	International	60.8		6.1	54.7
Trip type	Day trip	50.7		10.3	40.4
	Overnight stay	60.2		9.2	51.0

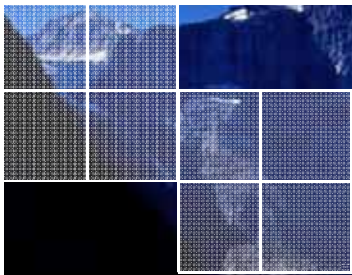


Cleanliness in the Town of Banff

- Women and people aged 55 years old and over are more appreciative of the cleanliness in the Town of Banff

Experience Perception according to Profile

Dimension : Cleanliness		Totally agree %	Disagree %	Index
Overall		80.4	1.0	79.4
Gender	Male	76.1	0.6	75.5
	Female	83.6	1.2	82.3
Age	18-34	79.8	1.6	78.2
	35-54	76.3	0.6	75.6
	55 +	86.9	0.6	86.3

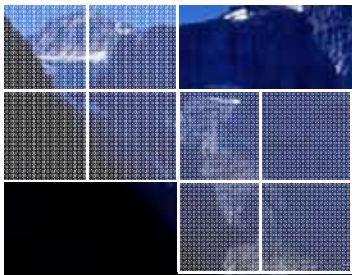


Cleanliness in the Town of Banff

- Americans particularly appreciate the Town of Banff's cleanliness

Experience Perception according to Profile

Dimension : Cleanliness		Totally agree %		Disagree %	Index	
Residence	Regional	76.8			1.2	75.6
	Other Canada	79.8			1.0	78.8
	USA	85.5			0.5	85.0
	International	80.4			0.0	80.4
Trip type	Day trip	72.9			2.1	70.8
	Overnight stay	80.8			0.9	79.9

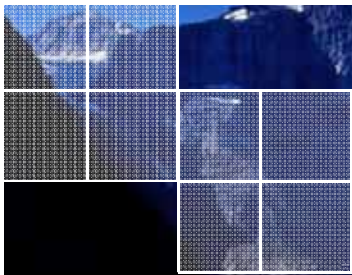


Safety in the Town of Banff

- A higher proportion of people aged 55 years old and over feel very safe in the Town of Banff

Experience Perception according to Profile

Dimension : Safety		Totally agree %	Disagree %	Index
Overall		71.6	3.0	68.6
Gender	Male	70.7	2.7	68.0
	Female	72.7	3.1	69.5
Age	18-34	69.8	3.7	66.1
	35-54	67.2	2.9	64.3
	55 +	80.1	1.2	78.9

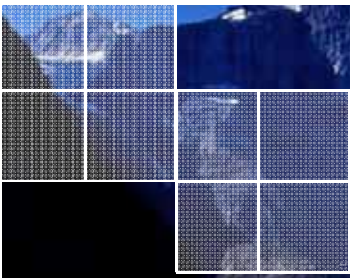


Safety in the Town of Banff

- Regional residents' perception of safety is much lower compared to others

Experience Perception according to Profile

Dimension : Safety		Totally agree %	Disagree %	Index
Residence	Regional	60.9	5.2	55.8
	Other Canada	77.1	2.9	74.3
	USA	80.2	1.0	79.2
	International	79.9	1.3	78.6
Trip type	Day trip	44.9	6.1	38.8
	Overnight stay	73.3	2.8	70.5

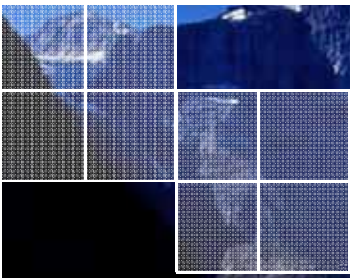


Value for the Money in the Town of Banff

- The indexes for Value for the money are low for all segments but particularly for people aged 18-34 years old

Experience Perception according to Profile

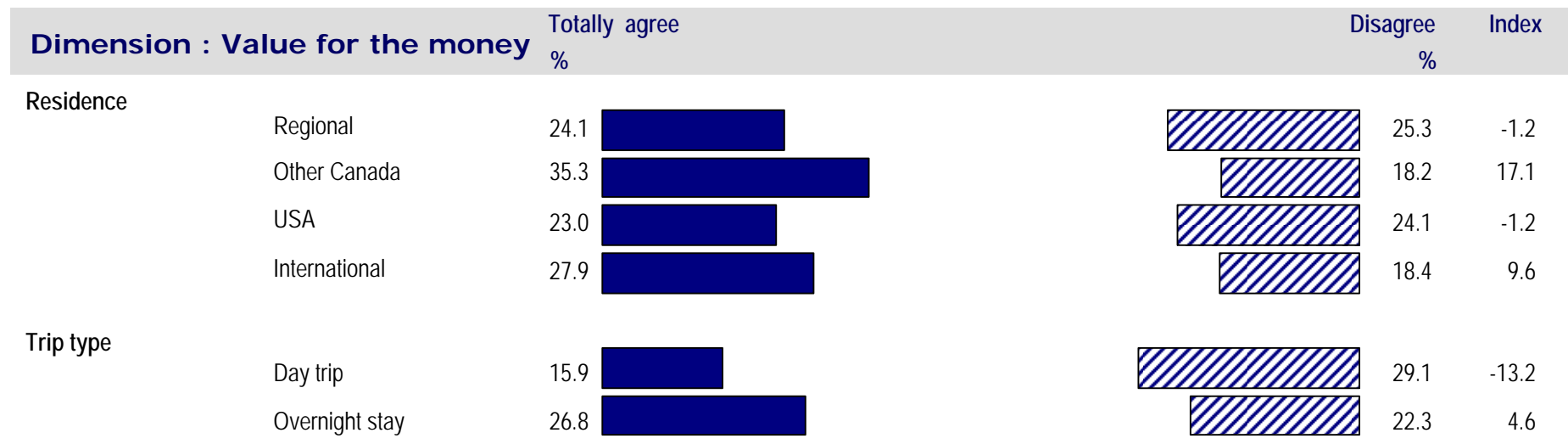
Dimension : Value for the money		Totally agree %		Disagree %	Index	
Overall		26.2			22.7	3.6
Gender						
	Male	24.9			23.7	1.2
	Female	27.0			21.7	5.4
Age						
	18-34	24.3			29.0	-4.8
	35-54	25.6			23.7	1.9
	55 +	31.3			14.7	16.6



Value for the Money in the Town of Banff

- Canadians (except the West) have a more positive perception of value for the money in the Town of Banff

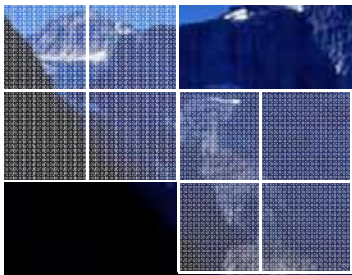
Experience Perception according to Profile





Detailed Perceptions of the Town of Banff Tourist Experience









Entertainment in the Town of Banff

- The indexes of the two Entertainment factors are high

Perception of the items by dimension

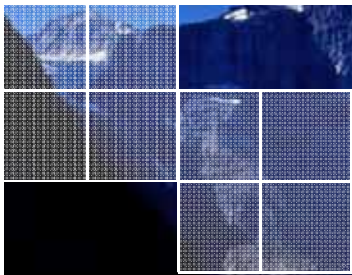
Dimension : Entertainment	Totally agree %		Disagree %	Index
Visitors to the Town of Banff can have an enjoyable evening out at night	74.8		 2.0	72.8
Visitors to the Town of Banff can experience a variety of cuisines	72.5		 3.0	69.5

% of tourists who answered the question



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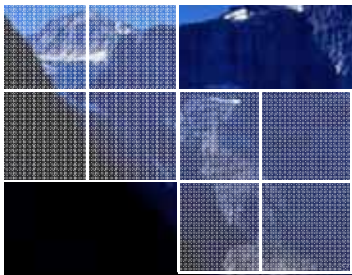
Welcome in the Town of Banff

- The Welcome factors do not get very high indexes, especially the impression of being in an authentic mountain community

Perception of the items by dimension

Dimension : Welcome	Totally agree %	Disagree %	Index
In the Town of Banff you get the impression of being in an authentic mountain community	45.0	20.0	25.0
In the Town of Banff the locals are spontaneously welcoming	43.5	10.1	33.4
For visitors to the Town of Banff contact with the local population is easy	40.7	13.4	27.3




% of tourists who answered the question



Atmosphere in the Town of Banff

- Visitors are generally satisfied with the Atmosphere factors, especially the pleasantness of public places

Perception of the items by dimension

Dimension : Atmosphere	Totally agree %	Disagree	Index
In the Town of Banff the public places are pleasant	72.3	 1.6	70.7
In the Town of Banff it's pleasant to take a stroll in the streets	71.6	 4.5	67.1
In the Town of Banff the streets are vibrant	57.2	 4.6	52.6

% of tourists who answered the question

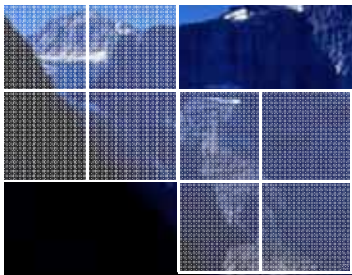
Arts and Culture in the Town of Banff

- Culture items are perceived positively by visitors

Perception of the items by dimension

Dimension : Arts and Culture	Totally agree %	Disagree %	Index
In the Town of Banff you can see the Banff National Park's historical and cultural heritage	62.8	4.4	58.4
In the Town of Banff you can visit numerous quality paid tourist attractions	58.3	5.7	52.6

% of tourists who answered the question



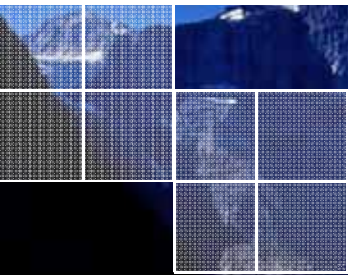
Aesthetics in the Town of Banff

- Both factors of the Aesthetics dimension score very high

Perception of the items by dimension

Dimension : Aesthetics	Totally agree %		Disagree %	Index
In the Town of Banff you can admire the park from several impressive viewpoints	79.5		2.9	76.6
In the Town of Banff much care is given to landscaping	76.1		1.6	74.5

% of tourists who answered the question



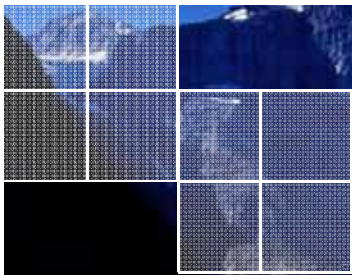
Variety of Activities in the Town of Banff

- The range of outdoor activities offered and the possibility to enjoy the town with children are well perceived by tourists
- Regarding shopping, the originality of products should be improved.

Perception of the items by dimension

Dimension : Variety of Activities	Totally agree %	Disagree %	Index
If you have children, you can enjoy a visit to the Town of Banff	68.0	4.5	63.5
There are plenty of outdoor recreational activities in the Town of Banff	66.9	3.1	63.8
In the Town of Banff the visitor can discover the surroundings through guided, original and authentic tours	56.9	3.9	53.0
Regardless of the weather, you can enjoy a visit to the Town of Banff	50.3	9.5	40.8
In the Town of Banff you can make interesting and surprising discoveries away from main attractions	49.1	5.1	44.0
In the Town of Banff visitors can buy products they cannot find at home	36.8	17.3	19.5

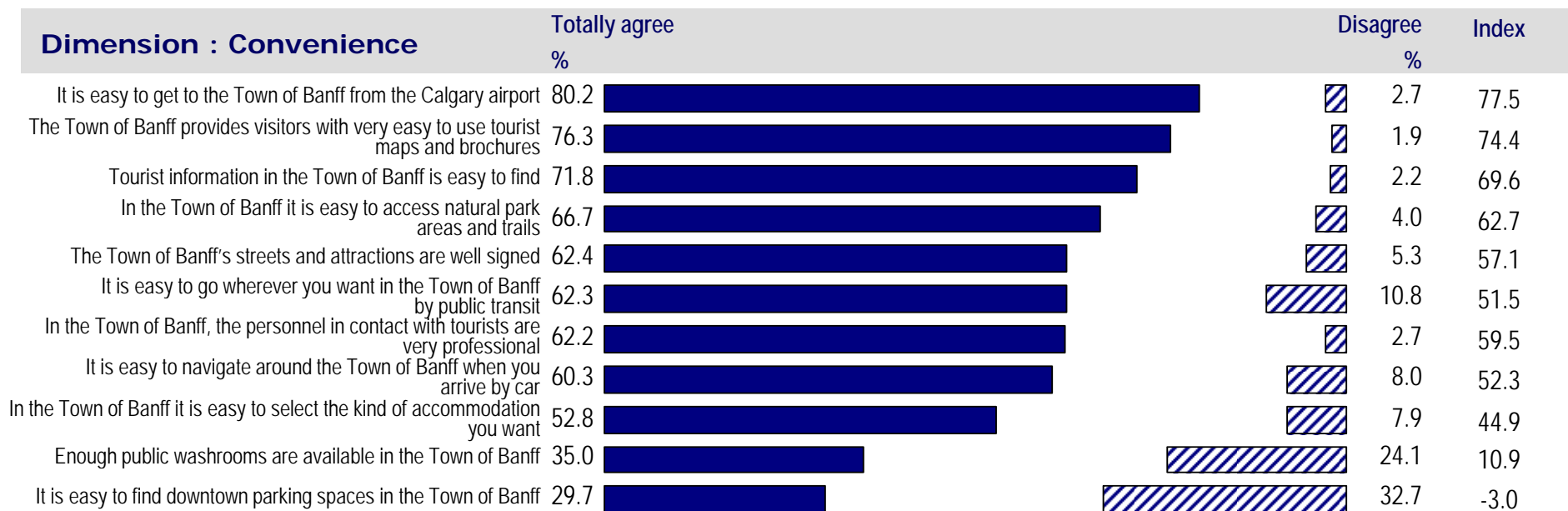
% of tourists who answered the question



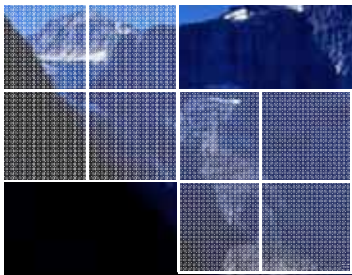
Convenience in the Town of Banff

- Most items regarding a convenient stay in the Town of Banff benefit from a positive perception
- Yet, visitors are not satisfied with the number of parking spaces and public washrooms available.

Perception of the items by dimension



% of tourists who answered the question



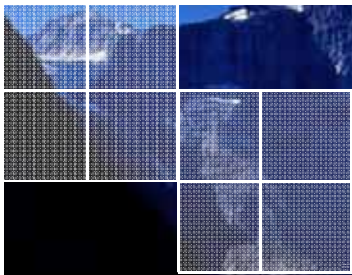
Cleanliness in the Town of Banff

- The majority of visitors feel they are in a very clean environment in the Town of Banff

Perception of the items by dimension

Dimension : Cleanliness	Totally agree %	Disagree %	Index
Visitors to the Town of Banff feel they are in a very clean environment	80.4	1.0	79.4

% of tourists who answered the question



Safety in the Town of Banff

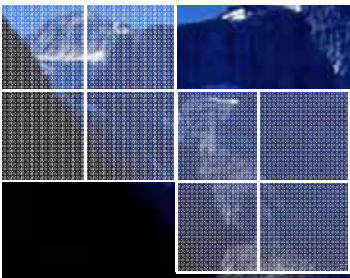
- Most visitors feel very safe in the Town of Banff

Perception of the items by dimension

Dimension : Safety	Totally agree %	Disagree %	Index
In the Town of Banff you feel really safe	71.6	3.0	68.6

% of tourists who answered the question





Value for the Money in the Town of Banff

- Tourists are not satisfied with value for the money in the Town of Banff, especially for accommodations and stores

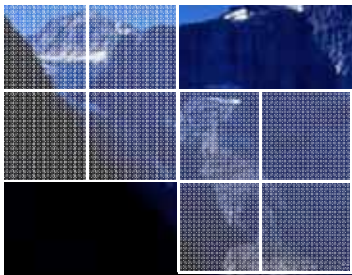
Perception of the items by dimension

Dimension : Value for the Money	Totally agree %		Disagree %	Index	
Value for the money is very good in the Town of Banff museums and paid tourist attractions	33.1			14.5	18.6
Value for the money is very good in Town of Banff restaurants	27.6			20.6	7.0
Value for the money is very good in Town of Banff accommodations	25.0			29.3	-4.3
Value for the money is very good in Town of Banff stores	18.8			26.3	-7.5

% of tourists who answered the question

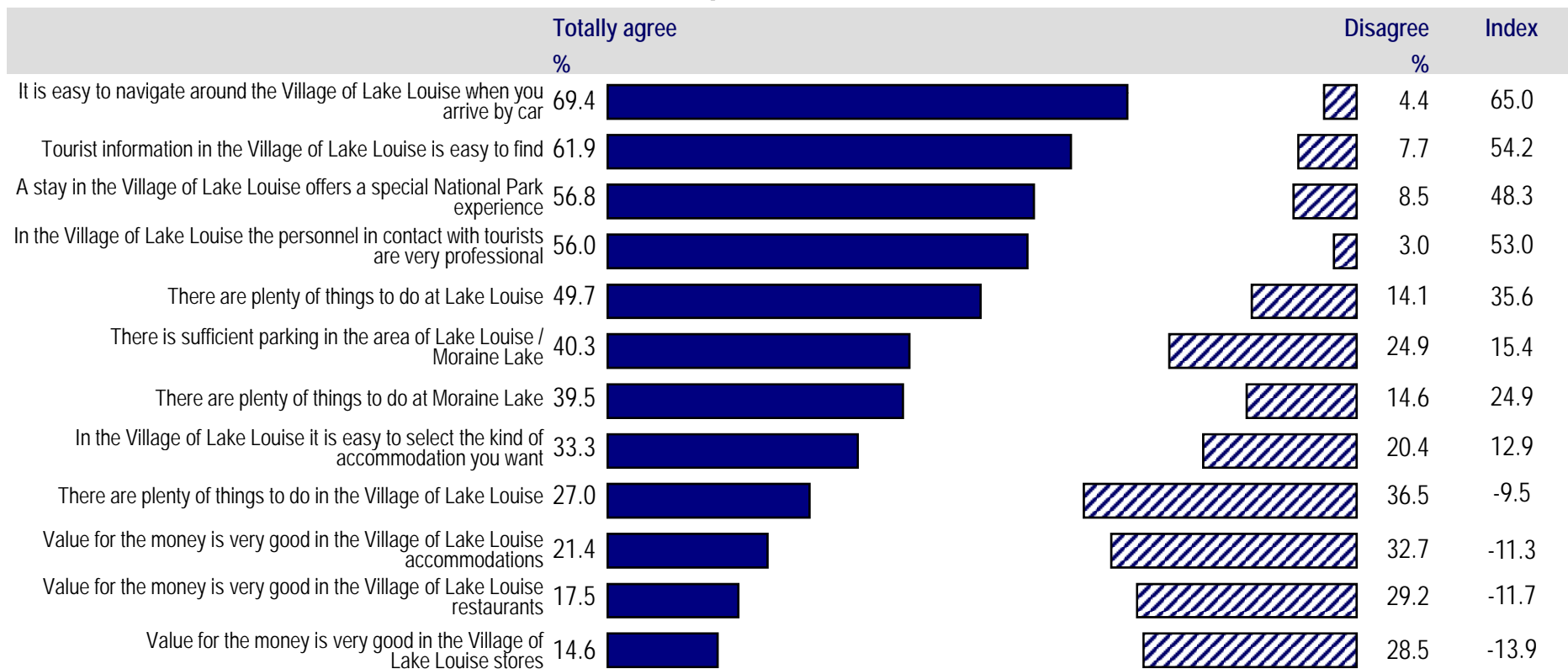


Detailed Perceptions of the Village of Lake Louise Tourist Experience



The Village of Lake Louise visitors are not satisfied with the value for money

Perception of the items



% of tourists who answered the question

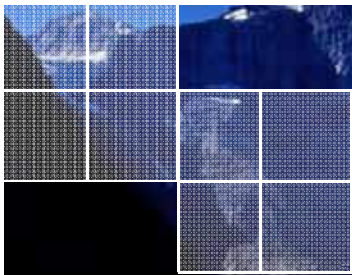


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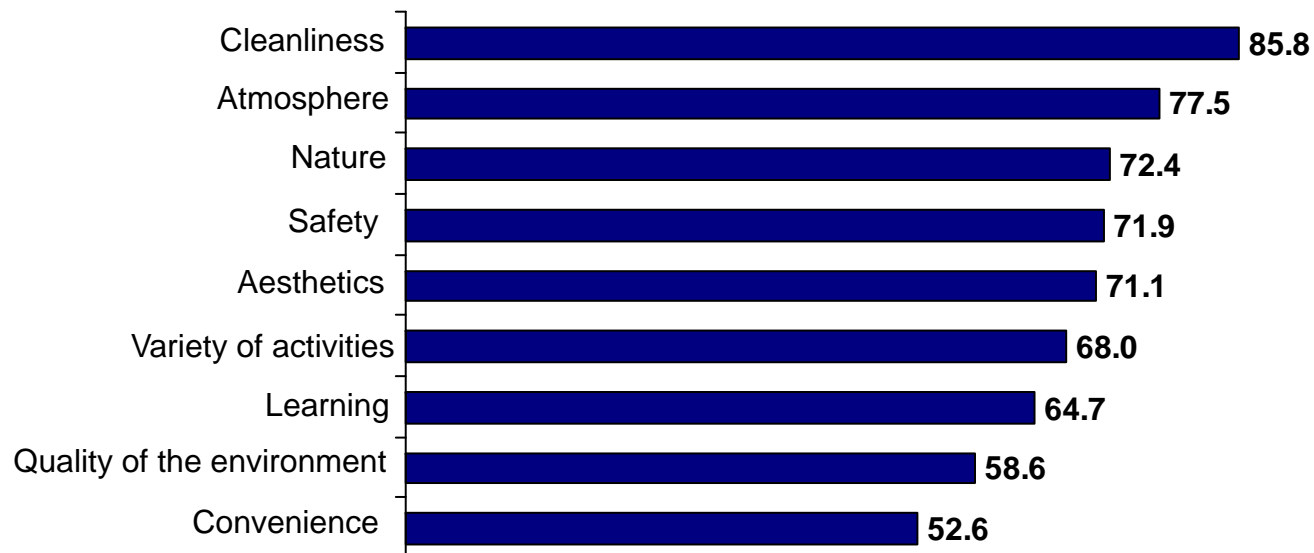


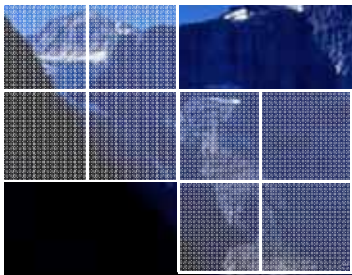
Banff National Park Experience Perception by Respondent Profile



The major strengths of the Banff National Park experience are Cleanliness and Atmosphere

Summary of Satisfaction Indexes for Banff National Park



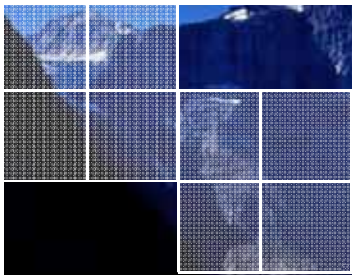


Aesthetics in Banff National Park

- Women and people aged 55 years old and over are the most appreciative segments to the aesthetics of the Park

Experience Perception according to Profile

Dimension : Aesthetics		Totally agree %	Disagree %	Index
Overall		75.0	3.9	71.1
Gender	Male	71.0	2.8	68.3
	Female	77.7	4.8	72.9
Age	18-34	65.5	6.9	58.6
	35-54	76.1	3.9	72.2
	55 +	81.6	0.7	81.0

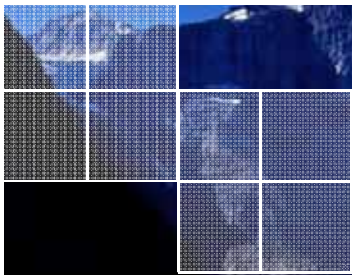


Aesthetics in Banff National Park

- Americans and Canadians (except the West) have a more positive perception of the Park' s aesthetics

Experience Perception according to Profile

Dimension : Aesthetics		Totally agree %	Disagree %	Index
Residence	Regional	72.4	5.3	67.1
	Other Canada	77.7	2.1	75.5
	USA	80.0	2.6	77.4
	International	68.6	5.0	63.6
Trip type	Day trip	65.5	3.4	62.1
	Overnight stay	75.4	3.9	71.5

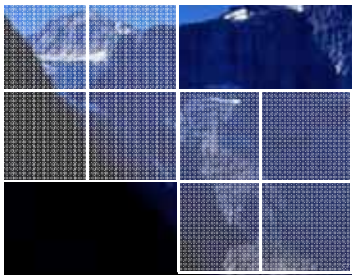


Atmosphere in Banff National Park

- The perception of atmosphere does not vary according to age nor gender

Experience Perception according to Profile

Dimension : Atmosphere		Totally agree %	Disagree %	Index
Overall		79.7	2.2	77.5
Gender	Male	79.3	1.7	77.6
	Female	80.3	2.5	77.8
Age	18-34	78.9	2.1	76.9
	35-54	80.2	2.7	77.5
	55 +	81.6	1.7	80.0

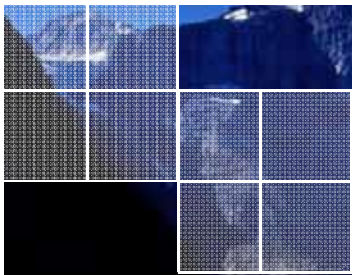


Atmosphere in Banff National Park

- Residents of Western Canada perceive the atmosphere in the Park slightly less positively

Experience Perception according to Profile

Dimension : Atmosphere		Totally agree %		Disagree %	Index
Residence	Regional	75.0		2.5	72.5
	Other Canada	80.0		0.5	79.5
	USA	83.1		2.6	80.5
	International	81.1		2.2	79.0
Trip type	Day trip	74.9		0.0	74.9
	Overnight stay	79.9		2.3	77.6

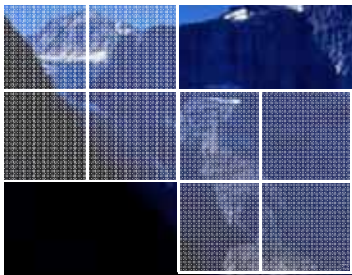


Cleanliness in Banff National Park

- Cleanliness indexes are very high for all segments

Experience Perception according to Profile

Dimension : Cleanliness		Totally agree %	Disagree %	Index
Overall		86.5	0.7	85.8
Gender	Male	86.0	1.0	85.0
	Female	87.1	0.5	86.6
Age	18-34	84.2	0.0	84.2
	35-54	88.1	1.0	87.0
	55 +	87.8	0.7	87.2

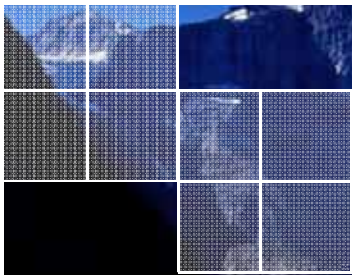


Cleanliness in Banff National Park

- Cleanliness indexes are very high, especially for Americans and international tourists

Experience Perception according to Profile

Dimension : Cleanliness		Totally agree %		Disagree %	Index
Residence	Regional	82.4			81.6
	Other Canada	85.1			84.0
	USA	88.5			87.4
	International	91.2			91.2
Trip type	Day trip	73.3			73.3
	Overnight stay	87.1			86.3

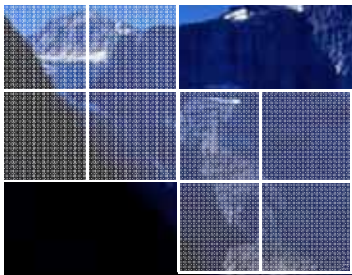


Convenience in Banff National Park

- There are no major differences in the indexes of the Convenience dimension according to age and gender

Experience Perception according to Profile

Dimension : Convenience		Totally agree %		Disagree %	Index
Overall		59.7		7.2	52.6
Gender	Male	58.6		7.4	51.2
	Female	61.0		7.1	53.9
Age	18-34	59.8		8.7	51.1
	35-54	59.8		7.6	52.2
	55 +	59.6		6.1	53.6

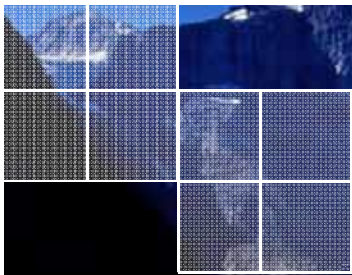


Convenience in Banff National Park

- Canadians (except the West) have a slightly more positive perception of the Convenience dimension

Experience Perception according to Profile

Dimension : Convenience		Totally agree %	Disagree %	Index
Residence	Regional	58.0	7.6	50.4
	Other Canada	63.2	5.9	57.3
	USA	60.2	8.5	51.7
	International	59.3	6.7	52.6
Trip type	Day trip	58.0	7.7	50.3
	Overnight stay	59.8	7.1	52.7

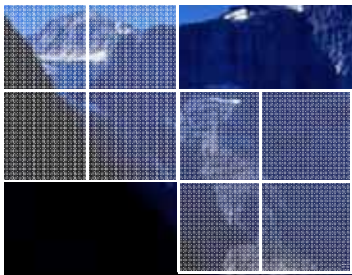


Learning in Banff National Park

- Indexes for the Learning dimension are somewhat higher among women and people aged 35 to 54 years old

Experience Perception according to Profile

Dimension : Learning		Totally agree %	Disagree %	Index
Overall		67.4	2.7	64.7
Gender	Male	64.7	2.0	62.7
	Female	69.5	3.2	66.2
Age	18-34	67.9	4.7	63.1
	35-54	70.3	2.9	67.5
	55 +	64.3	0.7	63.6

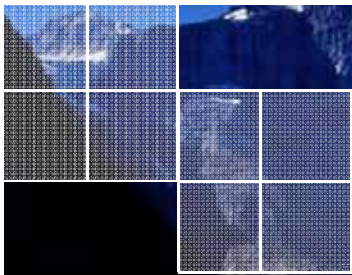


Learning in Banff National Park

- A somewhat lower proportion of international tourists appreciate the learning opportunities in the Park

Experience Perception according to Profile

Dimension : Learning		Totally agree %	Disagree %	Index
Residence	Regional	68.9	2.4	66.5
	Other Canada	67.6	1.1	66.5
	USA	67.3	5.0	62.3
	International	62.8	1.2	61.6
Trip type	Day trip	62.2	0.0	62.2
	Overnight stay	67.6	2.8	64.8

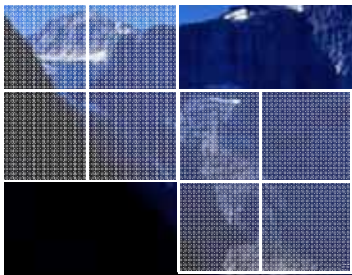


Nature in Banff National Park

- The appreciation of nature is similar across gender and age groups

Experience Perception according to Profile

Dimension : Nature		Totally agree %	Disagree %	Index
Overall		75.9	3.5	72.4
Gender	Male	75.1	3.6	71.5
	Female	76.5	3.5	73.0
Age	18-34	75.0	4.8	70.2
	35-54	76.8	3.3	73.6
	55 +	76.4	2.0	74.4

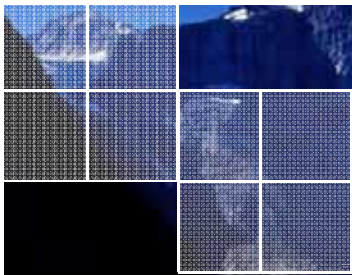


Nature in Banff National Park

- Tourists have a very positive perception of the Nature dimension no matter where they reside

Experience Perception according to Profile

Dimension : Nature		Totally agree %		Disagree %	Index
Residence	Regional	74.1		4.7	69.5
	Other Canada	75.9		3.7	72.2
	USA	76.7		3.4	73.3
	International	76.7		2.1	74.5
Trip type	Day trip	71.7		0.0	71.7
	Overnight stay	76.1		3.7	72.4

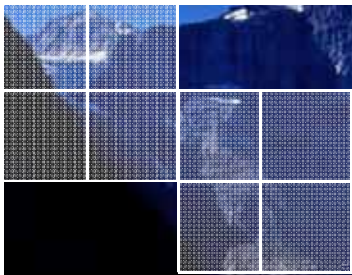


Quality of the Environment in Banff National Park

- A higher proportion of women appreciate the quality of the environment in the Park

Experience Perception according to Profile

Dimension : Quality of the environment		Totally agree %	Disagree %	Index
Overall		64.6	6.0	58.6
Gender	Male	61.5	6.7	54.7
	Female	67.8	5.2	62.5
Age	18-34	62.4	7.5	54.9
	35-54	64.2	5.6	58.6
	55 +	63.8	4.2	59.6

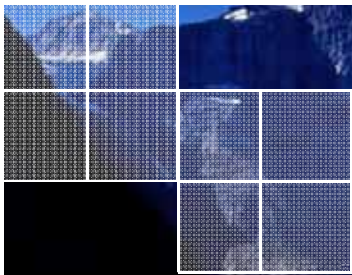


Quality of the Environment in Banff National Park

- Americans have a more positive perception of the quality of the environment in the Park

Experience Perception according to Profile

Dimension : Quality of the environment		Totally agree %		Disagree %	Index
Residence	Regional	61.0		6.8	54.2
	Other Canada	65.0		5.8	59.2
	USA	69.5		4.8	64.8
	International	60.3		7.9	52.4
Trip type	Day trip	54.4		2.4	52.0
	Overnight stay	65.1		6.2	58.9

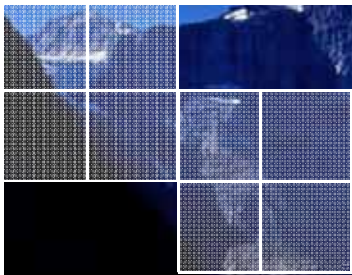


Safety in Banff National Park

- The Safety indexes for women and people aged 35 to 54 years old are somewhat higher

Experience Perception according to Profile

Dimension : Safety	Totally agree %		Disagree %	Index
Overall	73.2		1.3	71.9
Gender				
Male	71.3		1.8	69.5
Female	75.4		0.9	74.5
Age				
18-34	72.7		0.7	71.9
35-54	76.1		1.6	74.5
55 +	70.4		0.4	70.1



Safety in Banff National Park

- Canadians (except the West) have a more favourable perception of safety

Experience Perception according to Profile

Dimension : Safety		Totally agree %		Disagree %	Index	
Residence	Regional	70.3			1.3	69.0
	Other Canada	77.8			0.6	77.2
	USA	74.0			1.4	72.6
	International	74.0			1.9	72.2
Trip type	Day trip	60.2			1.9	58.3
	Overnight stay	73.7			1.2	72.5



Variety of Activities in Banff National Park

- Women have a slightly more positive perception of the variety of activities offered in the Park

Experience Perception according to Profile

Dimension : Variety of activities	Totally agree %		Disagree %	Index
Overall	72.8		4.8	68.0
Gender				
Male	71.9		5.5	66.4
Female	74.2		4.0	70.2
Age				
18-34	73.7		4.4	69.2
35-54	73.6		5.5	68.1
55 +	71.7		4.1	67.6



Variety of Activities in Banff National Park

- For the Variety of Activities dimension, the index for Canadians (except the West) is lower

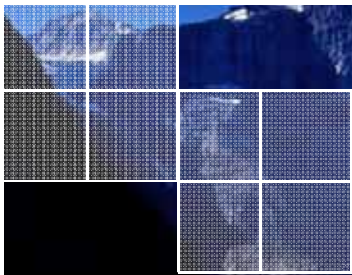
Experience Perception according to Profile

Dimension : Variety of activities		Totally agree %		Disagree %	Index
Residence	Regional	73.3		4.2	69.1
	Other Canada	73.1		21.7	51.4
	USA	73.8		5.7	68.1
	International	68.7		5.6	63.1
Trip type	Day trip	69.9		2.5	67.4
	Overnight stay	73.0		4.9	68.1



Detailed Perceptions of the Banff National Park Tourist Experience





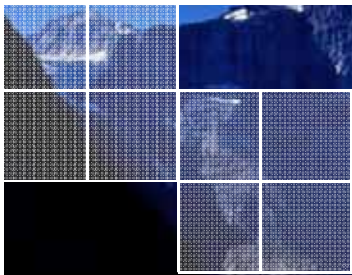
Nature in Banff National Park

- The majority of visitors feel they can connect with nature in the Park but fewer people agree that the chance to see wildlife is a distinctive experience

Perception of the items by dimension

Dimension : Nature	Totally agree %	Disagree %	Index
Banff National Park is a great place to connect with nature	86.1	1.0	85.1
The chance to see wildlife is a distinctive experience in Banff National Park	65.6	6.1	59.5

% of tourists who answered the question



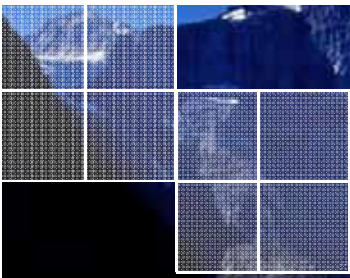
Learning in Banff National Park

- Most visitors agree that there are many learning opportunities in the Park, especially regarding mountain nature and wildlife

Perception of the items by dimension

Dimension : Learning	Totally agree %		Disagree %	Index
There are many opportunities in the Park to learn about mountain nature and wildlife	75.1		1.4	73.7
There are many opportunities in the Park to learn about mountain culture and history	59.5		3.9	55.6

% of tourists who answered the question



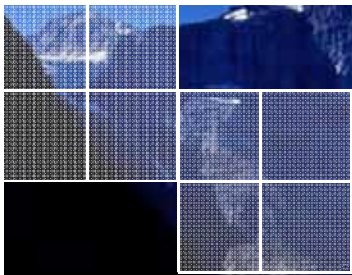
Variety of Activities in Banff National Park

- The majority of tourists appreciate the variety of activities offered in the Park, but a lower proportion believe the park is enjoyable in all weather and liked special events

Perception of the items by dimension

Dimension : Variety of Activities	Totally agree %	Disagree %	Index
Banff National Park offers really great hiking opportunities	87.2	0.7	86.5
There are plenty of opportunities for adventure and discovery in Banff National Park	85.5	0.7	84.8
Banff National Park is a really enjoyable place for families	82.1	0.9	81.2
There is a great variety of outdoor activities offered in Banff National Park	80.7	1.6	79.1
Banff National Park is enjoyable in all weather	49.1	13.5	35.6
Special events held in the Park added to my experience	45.8	13.8	32.0

% of tourists who answered the question



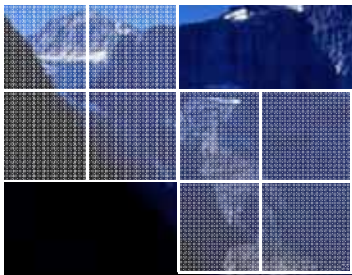
Convenience in Banff National Park

- Most items related to a convenient visit in Banff National Park are evaluated positively except for congestion at Park sites and access to food and services in the Park

Perception of the items by dimension

Dimension : Convenience	Totally agree %	Disagree %	Index
Banff National Park staff are very helpful	75.9	1.8	74.1
It is easy to find information about Banff National Park's attractions and activities	71.3	2.4	68.9
The quality of public facilities in the Park is good	66.0	3.1	62.9
The road signs in Banff National Park make it easy to find one's way	65.5	5.2	60.3
Easy access to Banff / Lake Louise lodgings and services greatly enhanced my Park experience	59.6	5.0	54.6
Banff National Park staff helped me make personal connections to the places I visited	50.8	10.5	40.3
There is adequate access to food and services in the Park, outside of the Town of Banff	48.0	12.0	36.0
The congestion at Park sites and attractions is acceptable	38.4	18.0	20.4

% of tourists who answered the question



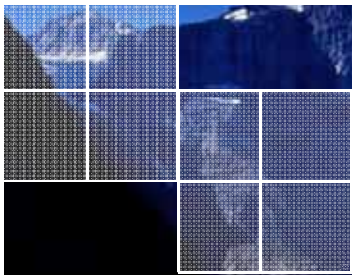
Atmosphere in Banff National Park

- Most tourists rated the Atmosphere items very high

Perception of the items by dimension

Dimension : Atmosphere	Totally agree %		Disagree %	Index
Banff National Park is an exciting place to visit	85.4		1.2	84.2
Visitors to the Park can find the level of peace and relaxation that they want	77.5		3.2	74.3

% of tourists who answered the question



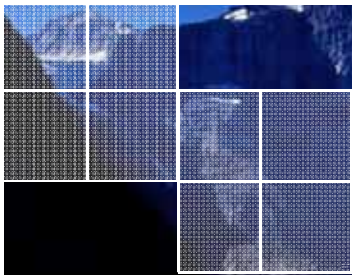
Aesthetics in Banff National Park

- Three quarters of the visitors consider the beauty of the Park to be unmatched

Perception of the items by dimension

Dimension : Aesthetics	Totally agree %	Disagree %	Index
The beauty of Banff National Park scenery and landscape is unmatched	75.0	3.8	71.2

% of tourists who answered the question



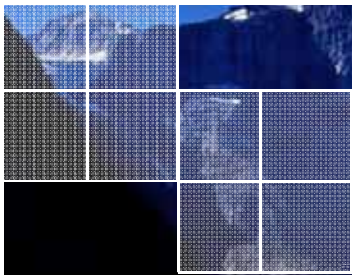
Cleanliness in Banff National Park

- The majority of tourists believe the Park is clean

Perception of the items by dimension

Dimension : Cleanliness	Totally agree %	Disagree %	Index
Banff National Park is clean	86.5	0.7	85.8

% of tourists who answered the question



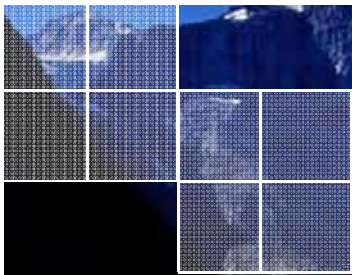
Safety in Banff National Park

- A high proportion of visitors agree with both items of the Safety dimension

Perception of the items by dimension

Dimension : Safety	Totally agree %		Disagree %	Index
It is easy to follow Park rules about safety	76.4		1.2	75.2
It is easy to find information about how to enjoy Banff National Park safely	70.1		1.4	68.7

% of tourists who answered the question



Quality of the environment in Banff National Park

- Almost three quarters of visitors perceived that efforts were made to keep nature healthy but a lower proportion felt they were able to contribute

Perception of the items by dimension

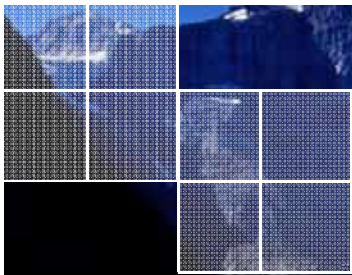
Dimension : Quality of the environment	Totally agree %	Disagree %	Index
I could see that things are being done to keep nature healthy in Banff National Park	71.3	3.1	68.2
While in Banff National Park, I was able to do something to help keep nature healthy	57.7	9.1	48.6

% of tourists who answered the question



Detailed Expectations and Satisfaction for the Town of Banff Tourist Experience

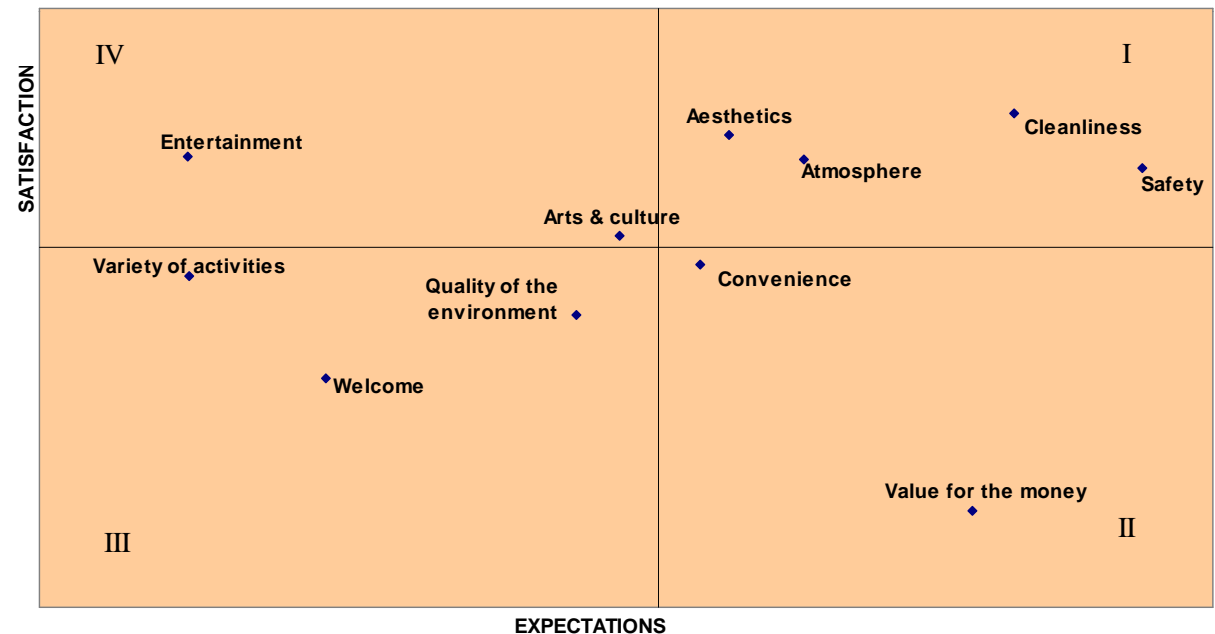


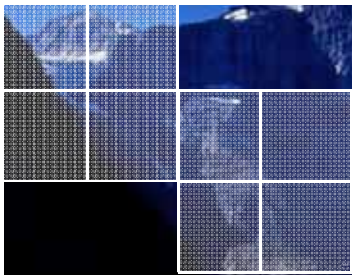


A strategy to meet expectations within the Town of Banff

The Town of Banff Expectations/Satisfaction Quadrants by Dimension

- Cleanliness, Safety, Aesthetics and Atmosphere are important expectations that enjoy strong appreciation, and should be capitalized on to stand out from competing destinations.
- Convenience and Value for the money are the dimensions for which satisfaction needs to be improved to enhance experience quality.

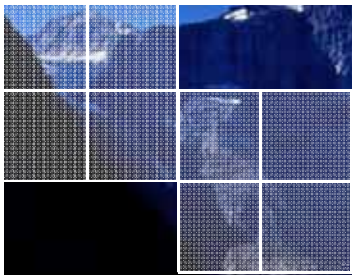




Targeted actions to meet expectations and improve satisfaction with the Town of Banff tourist experience (detailed in the following pages)

Expectations/satisfaction Quadrants

<p>Satisfaction + Expectations-</p> <ul style="list-style-type: none"> ▪ That much care be given to landscaping (gardens, flowers, etc.) ▪ Numerous quality tourist attractions to visit ▪ That streets be vibrant ▪ That it be easy to go wherever I want in the town by public transit ▪ That it be easy to get to the town from the airport ▪ That it be easy to navigate around town when you arrive by car ▪ That I have an enjoyable evening out at night ▪ That I can experience a variety of cuisines ▪ That I be able to discover the surroundings through guided, original and authentic tours ▪ Plenty of outdoor recreational activities ▪ That I be able to enjoy a visit with children 	<p>Satisfaction + Expectations +</p> <ul style="list-style-type: none"> ▪ Impressive viewpoints to admire the surroundings ▪ That I see the town's historical and cultural heritage ▪ That I be able to take a pleasant stroll in the streets ▪ Pleasant public places ▪ Very clean environment ▪ Easy access to the surroundings ▪ Well signed streets and attractions ▪ That personnel in contact with tourists be very professional ▪ Easy to find tourist information ▪ Very easy to use tourist maps and brochures ▪ That I feel really safe
<p>Satisfaction - Expectations-</p> <ul style="list-style-type: none"> ▪ That downtown parking spaces be easy to find ▪ That I be able to buy products I cannot find at home ▪ That I be able to enjoy a visit no matter the weather ▪ Easy contact with the local population ▪ That locals be spontaneously welcoming ▪ The impression I get of being in an authentic town 	<p>Satisfaction - Expectations +</p> <ul style="list-style-type: none"> ▪ That I be able to easily select the kind of accommodation I want ▪ That enough public washrooms be available ▪ Value for the money in accommodations ▪ Value for the money in restaurants ▪ Value for the money in stores ▪ Value for money in museums and paid tourist attractions ▪ Interesting and surprising discoveries to be made away from main attractions

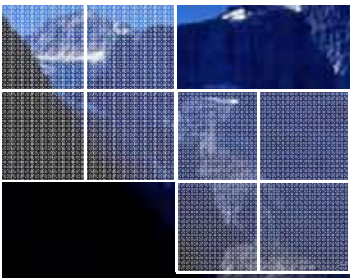


The experience elements for which quality should be maintained

Expectations/satisfaction Quadrants

Satisfaction + Expectations -

- **Aesthetics**
 - That much care be given to landscaping (gardens, flowers, etc.)
- **Arts and Culture**
 - Numerous quality tourist attractions to visit
- **Atmosphere**
 - That streets be vibrant
- **Convenience**
 - That it be easy to go wherever I want in the town by public transit
 - That it be easy to get to the town from the airport
 - That it be easy to navigate around town when you arrive by car
- **Entertainment**
 - That I have an enjoyable evening out at night
 - That I can experience a variety of cuisines
- **Variety of activities**
 - That I be able to discover the surroundings through guided, original and authentic tours
 - Plenty of outdoor recreational activities
 - That I be able to enjoy a visit with children



The experience elements to capitalize on

Expectations/satisfaction Quadrants

- **Aesthetics**
 - Impressive viewpoints to admire the surroundings
- **Arts and Culture**
 - That I see the town's historical and cultural heritage
- **Atmosphere**
 - That I be able to take a pleasant stroll in the streets
 - Pleasant public places
- **Cleanliness**
 - Very clean environment
- **Convenience**
 - Easy access to the surroundings
 - Well signed streets and attractions
 - That personnel in contact with tourists be very professional
 - Easy to find tourist information
 - Very easy to use tourist maps and brochures
- **Safety**
 - That I feel really safe

**Satisfaction +
Expectations +**

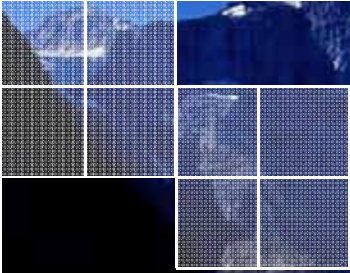


The experience elements to control

Expectations/satisfaction Quadrants

- **Convenience**
 - That downtown parking spaces be easy to find
- **Variety of activities**
 - That I be able to buy products I cannot find at home
 - That I be able to enjoy a visit no matter the weather
- **Welcome**
 - Easy contact with the local population
 - That locals be spontaneously welcoming
 - The impression I get of being in an authentic town

Satisfaction -
Expectations -

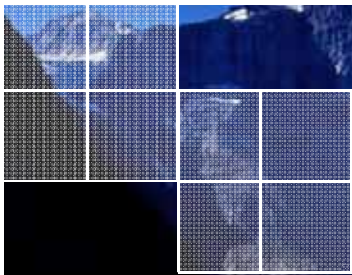


The experience elements that should be improved first

Expectations/satisfaction Quadrants

- **Convenience**
 - That I be able to easily select the kind of accommodation I want
 - That enough public washrooms be available
- **Value for the money**
 - Value for the money in accommodations
 - Value for the money in restaurants
 - Value for the money in stores
 - Value for money in museums and paid tourist attractions
- **Variety of activities**
 - Interesting and surprising discoveries to be made away from main attractions

Satisfaction -
Expectations +

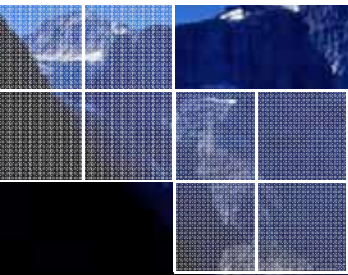


The ranking of items by importance can help prioritize actions to improve the tourist experience

- The higher the difference between the importance and satisfaction ranks of an item, the higher the urgency to act on this item to improve the experience.

Importance and Satisfaction Scores by Item of the Town of Banff Experience

Item	Importance Mean	Importance Rank	Satisfaction Index	Satisfaction Rank
That I feel really safe	8.85	1	68.6	10
Value for the money in accommodations	8.75	2	-4.3	34
That I be able to take a pleasant stroll in the streets	8.67	3	67.1	11
Value for the money in restaurants	8.66	4	7.0	32
Pleasant public places	8.59	5	70.7	7
Very clean environment	8.58	6	79.4	1
Easy access to the surroundings	8.49	7	62.7	14
Very easy to use tourist maps and brochures	8.46	8	74.5	5
Value for money in museums and paid tourist attractions	8.45	9	18.6	30
Easy to find tourist information	8.45	10	69.6	8



Ranking of Items by Importance (cont'd)

Importance and Satisfaction Scores by Item of the Town of Banff Experience

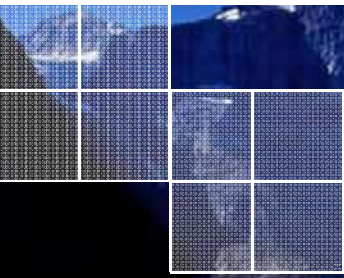
Item	Importance Mean	Importance Rank	Satisfaction Index	Satisfaction Rank
That I be able to easily select the kind of accommodation I want	8.43	11	45.0	23
That enough public washrooms be available	8.32	12	10.8	31
Well signed streets and attractions	8.26	13	57.2	17
That personnel in contact with tourists be very professional	8.23	14	59.6	15
Impressive viewpoints to admire the surroundings	8.21	15	76.6	3
Interesting and surprising discoveries to be made away from main attractions	8.12	16	44.0	24
Value for the money in stores	8.08	17	-7.4	35
That I see the town's historical and cultural heritage	7.96	18	58.4	16
That it be easy to navigate around town when you arrive by car	7.93	19	52.2	21
That downtown parking spaces be easy to find	7.83	20	-2.9	33



Ranking of Items by Importance (cont'd)

Importance and Satisfaction Scores by Item of the Town of Banff Experience

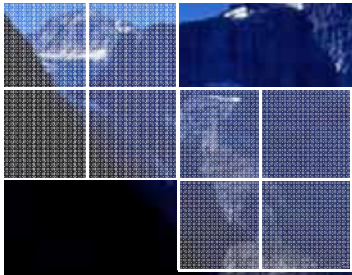
Item	Importance Mean	Importance Rank	Satisfaction Index	Satisfaction Rank
That I be able to enjoy a visit no matter the weather	7.78	22	40.8	25
That much care be given to landscaping (gardens, flowers, etc.)	7.73	23	74.5	4
Plenty of outdoor recreational activities	7.58	24	63.8	12
The impression I get of being in an authentic town	7.53	25	25.1	28
Numerous quality tourist attractions to visit	7.51	26	52.6	19
That locals be spontaneously welcoming	7.32	28	33.4	26
That streets be vibrant	7.13	29	52.6	20
That I have an enjoyable evening out at night	6.83	30	72.8	6



Ranking of Items by Importance (cont'd)

Importance and Satisfaction Scores by Item of the Town of Banff Experience

Item	Importance Mean	Importance Rank	Satisfaction Index	Satisfaction Rank
That I can experience a variety of cuisines	6.81	31	69.5	9
That I be able to buy products you cannot find at home	6.66	32	19.5	29
Easy contact with the local population	6.48	33	27.3	27
That it be easy to get to the town from the airport	6.36	34	77.6	2
That it be easy to go wherever I want in the town by public transit	6.24	35	51.5	22
That I be able to discover the surroundings through guided, original and authentic tours	5.44	36	53.0	18
That I be able to enjoy a visit with children	5.43	37	63.5	13

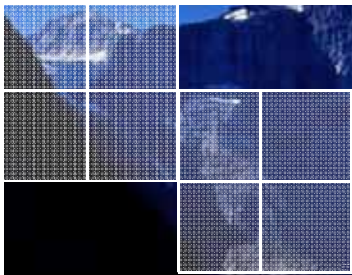


Top 10 Satisfaction Items for the Town of Banff

Item	Satisfaction Index
Visitors to the Town of Banff feel they are in a very clean environment	79.4
It is easy to get to the Town of Banff from the Calgary airport	77.6
In the Town of Banff you can admire the park from several impressive viewpoints	76.6
In the Town of Banff much care is given to landscaping (<i>gardens, flowers, etc.</i>)	74.5
The Town of Banff provides visitors with very easy to use tourist maps and brochures	74.5
Visitors to the Town of Banff can have an enjoyable evening out at night	72.8
In the Town of Banff the public places are pleasant	70.7
Tourist information in the Town of Banff is easy to find	69.6
Visitors to the Town of Banff can experience a variety of cuisines	69.5
In the Town of Banff you feel really safe	68.6



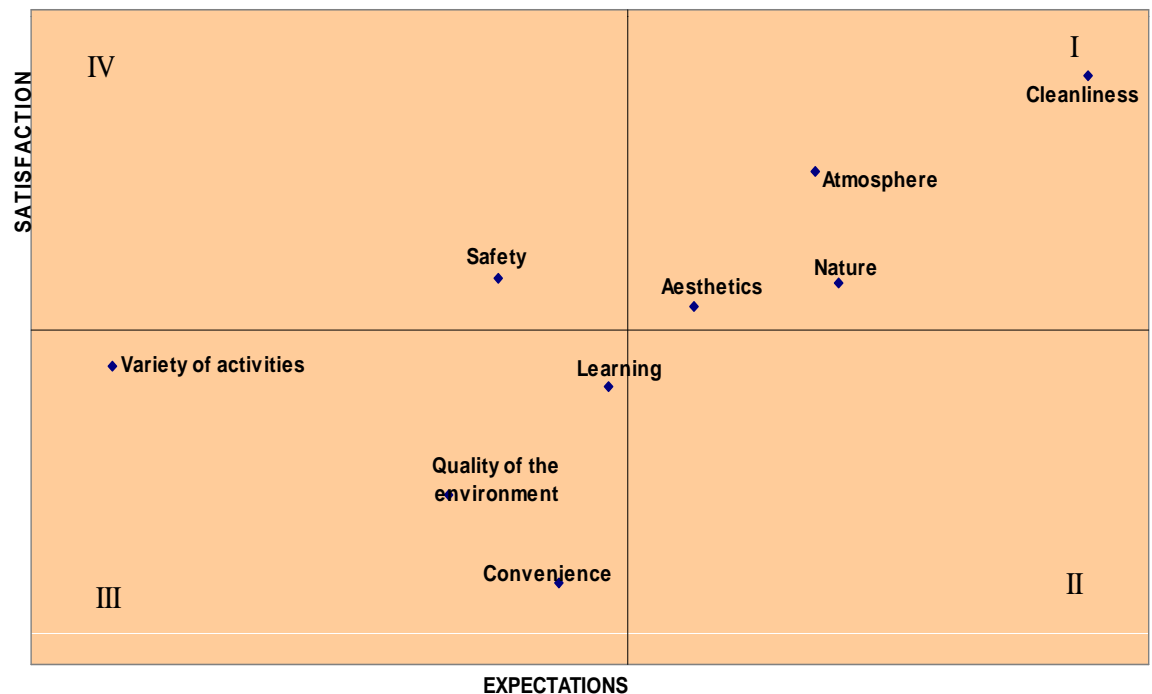
Analysis of Expectations and Satisfaction by Dimension and Item for the Banff National Park Tourist Experience

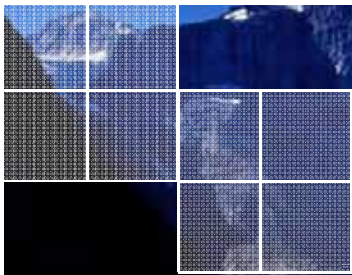


A strategy to meet expectations within the National Park

- Cleanliness, Nature, Aesthetics, Atmosphere and Nature are important expectations that enjoy strong appreciation, and should therefore be capitalized on to stand out from competing destinations.
- Although not as important in terms of expectations, Convenience, Learning and Quality of the environment are the dimensions for which satisfaction needs to be improved to enhance experience quality.

Banff National Park Expectations/Satisfaction Quadrants by Dimension

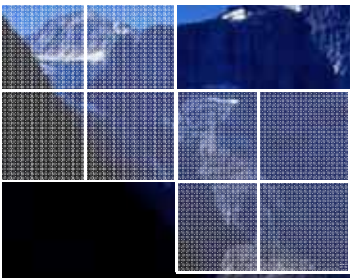




Targeted actions to meet expectations and improve satisfaction with the Banff National Park tourist experience (detailed in the following pages)

Expectations/Satisfaction Quadrants

<p>Satisfaction + Expectations-</p> <ul style="list-style-type: none"> ▪ That the National Park be an enjoyable place for families 	<ul style="list-style-type: none"> ▪ That the beauty of the National Park scenery and landscape be unmatched ▪ Opportunities in the National Park to learn about mountain nature and wildlife ▪ Opportunities in the National Park to learn about mountain culture and history ▪ That there be the chance to see wildlife in the National Park ▪ Really great hiking opportunities ▪ Easy access to lodgings and services ▪ That the road signs in the National Park make it easy to find one's way ▪ That information about how to enjoy the National Park safely be easy to find ▪ Easy to follow park rules about safety ▪ That Park Staff be very helpful ▪ Great variety of outdoor activities ▪ Good quality of public facilities in the National Park ▪ That the National Park be a great place to connect with nature ▪ That information about Park's attractions and activities be easy to find ▪ That the National Park be clean ▪ That there be plenty of opportunities for adventure and discovery ▪ That I be able to find the level of peace and relaxation I want ▪ That I be able to see things are being done to keep nature healthy ▪ That the National Park be an exciting place to visit 	<p>Satisfaction + Expectations +</p>
<ul style="list-style-type: none"> ▪ That Park staff help me make personal connections to the places I visit ▪ Adequate access to food and services in the National Park, outside of the town ▪ Special events held in the Park ▪ That the National Park be enjoyable in all weather <p>Satisfaction - Expectations -</p>	<ul style="list-style-type: none"> ▪ That the congestion at Park sites and attractions be acceptable ▪ That I be able to do something to help keep nature healthy <p>Satisfaction - Expectations +</p>	

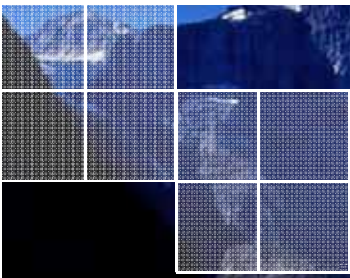


The experience elements for which quality should be maintained

Expectations/satisfaction Quadrants

**Satisfaction +
Expectations -**

- **Variety of activities**
 - That the National Park be an enjoyable place for families



The experience elements to capitalize on

Expectations/satisfaction Quadrants

- **Aesthetics**
 - That the beauty of the National Park scenery and landscape be unmatched
- **Atmosphere**
 - That I be able to find the level of peace and relaxation I want
 - That the National Park be an exciting place to visit
- **Cleanliness**
 - That the National Park be clean
- **Convenience**
 - Easy access to lodgings and services
 - That the road signs in the National Park make it easy to find one's way
 - That Park Staff be very helpful
 - Good quality of public facilities in the National Park
 - That information about Park's attractions and activities be easy to find
- **Learning**
 - Opportunities in the National Park to learn about mountain nature and wildlife
 - Opportunities in the National Park to learn about mountain culture and history
- **Nature**
 - That there be the chance to see wildlife in the National Park
 - That the National Park be a great place to connect with nature
- **Quality of the environment**
 - That I be able to see things are being done to keep nature healthy
- **Safety**
 - That information about how to enjoy the National Park safely be easy to find
 - Easy to follow park rules about safety
- **Variety of activities**
 - Really great hiking opportunities
 - Great variety of outdoor activities
 - That there be plenty of opportunities for adventure and discovery

**Satisfaction +
Expectations +**

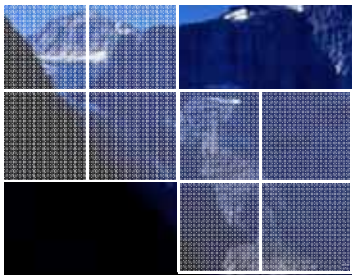


The experience elements to control

Expectations/satisfaction Quadrants

- **Convenience**
 - That Park staff help me make personal connections to the places I visit
 - Adequate access to food and services in the National Park, outside of the town
- **Variety of activities**
 - Special events held in the Park
 - That the National Park be enjoyable in all weather

Satisfaction -
Expectations -

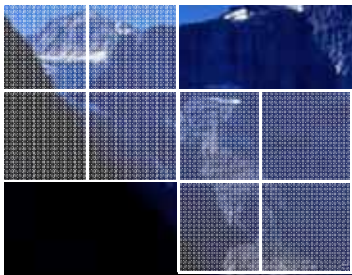


The experience elements that should be improved first

Expectations/satisfaction Quadrants

- **Convenience**
 - That the congestion at Park sites and attractions be acceptable
- **Quality of the environment**
 - That I be able to do something to help keep nature healthy

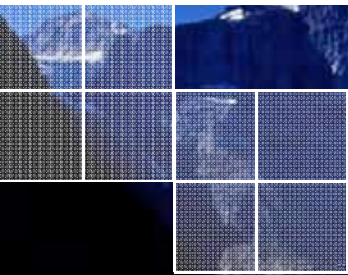
Satisfaction -
Expectations +



The ranking of items by importance can help prioritize actions to improve the tourist experience

Importance and Satisfaction Scores by Item for the Banff National Park Experience

Item	Importance Mean	Importance Rank	Satisfaction Index	Satisfaction Rank
That the National Park be clean	9.02	1	85.8	2
That I be able to find the level of peace and relaxation I want	8.79	2	74.3	9
That the National Park be a great place to connect with nature	8.74	3	85.1	3
That Park Staff be very helpful	8.69	4	74.0	10
That the road signs in the National Park make it easy to find one's way	8.66	5	60.2	17
That there be the chance to see wildlife in the National Park	8.63	6	59.5	18
That the National Park be an exciting place to visit	8.51	7	84.2	5
That information about Park's attractions and activities be easy to find	8.51	8	69.0	13
That the beauty of the National Park scenery and landscape be unmatched	8.49	9	71.1	12
That there be plenty of opportunities for adventure and discovery	8.49	10	84.8	4



Ranking of Items by Importance (cont'd)

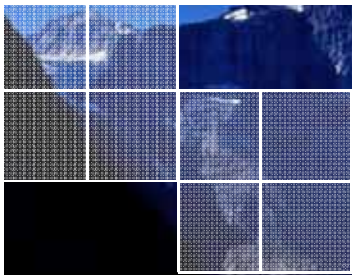
Importance and Satisfaction Scores by Item for the Banff National Park Experience

Item	Importance Mean	Importance Rank	Satisfaction Index	Satisfaction Rank
Opportunities in the National Park to learn about mountain nature and wildlife	8.48	11	73.6	11
That the congestion at Park sites and attractions be acceptable	8.46	12	20.4	26
Easy access to lodgings and services	8.43	13	54.6	20
That I be able to see things are being done to keep nature healthy	8.36	14	68.2	15
Good quality of public facilities in the National Park	8.31	15	62.9	16
That information about how to enjoy the National Park safely be easy to find	8.30	16	68.7	14
Opportunities in the National Park to learn about mountain culture and history	8.27	17	55.6	19
Great variety of outdoor activities	8.21	18	79.0	7
Easy to follow park rules about safety	8.15	19	75.2	8
Really great hiking opportunities	8.03	20	86.6	1

Ranking of Items by Importance (cont'd)

Importance and Satisfaction Scores by Item for the Banff National Park Experience

Item	Importance Mean	Importance Rank	Satisfaction Index	Satisfaction Rank
That I be able to do something to help keep nature healthy	7.96	21	48.6	21
That the National Park be enjoyable in all weather	7.88	22	35.6	24
That Park staff help me make personal connections to the places I visit	7.81	23	40.3	22
Adequate access to food and services in the National Park, outside of the town	7.59	24	35.9	23
That the National Park be an enjoyable place for families	7.43	25	81.2	6
Special events held in the Park	6.21	26	32.0	25

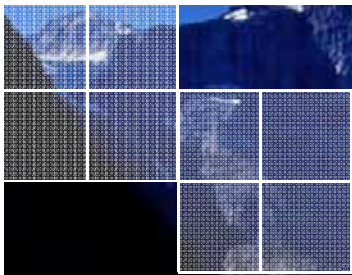


Top 10 Satisfaction Items for Banff National Park

Item	Satisfaction Index
Banff National Park offers really great hiking opportunities	86.6
Banff National Park is clean	85.8
Banff National Park is a great place to connect with nature	85.1
There are plenty of opportunities for adventure and discovery in Banff National Park	84.8
Banff National Park is an exciting place to visit	84.2
Banff National Park is a really enjoyable place for families	81.2
There is a great variety of outdoor activities offered in Banff National Park	79.0
It is easy to follow Park rules about safety	75.2
Visitors to the Park can find the level of peace and relaxation that they want	74.3
Banff National Park staff are very helpful	74.0



Differences in Satisfaction between Segments for the Town of Banff Items



Differences between Segments for the Town of Banff Items

- For each item, the following table shows the customer segments, depending on socio-demographics, where the differences are statistically significant compared to the overall mean.
- This information can be very useful for targeted marketing or concrete operational actions.

Differences between Segments for the Town of Banff

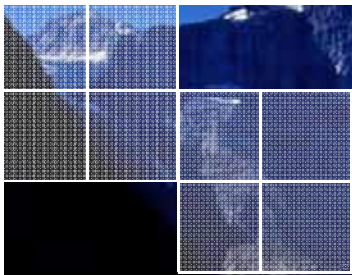
	More satisfied	Less satisfied
For visitors to the Town of Banff contact with the local population is easy (27.3)	-	Regional Camping Under 30 years old
In the Town of Banff the locals are spontaneously welcoming (33.4)	International Overnight stay Stay in a hotel / motel Stay in the Town of Banff	Regional Residents of Alberta Day trip Camping
In the Town of Banff you get the impression of being in an authentic mountain community (25.1)	Residents of Alberta Stay in a hotel / motel Stay in the Town of Banff Women High school / technical training or less	International Camping Men University Professional / business owner

Note : the score next to each item corresponds to the satisfaction index



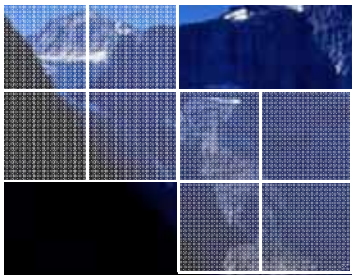
Differences between Segments for the Town of Banff Items

	More satisfied	Less satisfied
In the Town of Banff the streets are vibrant (52.6)	Residents of Alberta Stay in a hotel / motel Stay in the Town of Banff Women	Men University Professional/business owner
In the Town of Banff it's pleasant to take a stroll in the streets (67.1)	Stay in a hotel / motel Stay in the Town of Banff High school/technical training or less	Camping
In the Town of Banff it is easy to access natural park areas and trails (62.7)	Stay in a hotel / motel Stay in the Town of Banff	
In the Town of Banff the public places are pleasant (70.7)	Stay in a hotel / motel Stay in Bed & Breakfast / hostel Stay in the Town of Banff	Camping
In the Town of Banff you can see the Banff National Park's historical and cultural heritage (58.4)	Regional Residents of Alberta Women High school/ technical training or less	Men
In the Town of Banff you can visit numerous quality paid tourist attractions (52.4)	Stay in a hotel / motel Stay in the Town of Banff Women	Camping Men
In the Town of Banff much care is given to landscaping (<i>gardens, flowers, etc.</i>) (74.5)	Women	Men



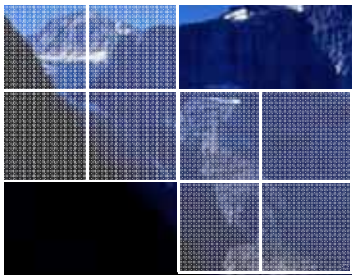
Differences between Segments for the Town of Banff Items

	More satisfied	Less satisfied
In the Town of Banff you can admire the park from several impressive viewpoints (76.6)	Women High school/ technical training or less	Camping Man
In the Town of Banff you can make interesting and surprising discoveries away from main attractions (44.0)	Residents of Alberta Stay in the Town of Banff Women High school/ technical training or less	International Men University
In the Town of Banff the visitor can discover the surroundings through guided, original and authentic tours (53.0)	Residents of Alberta Women	-
In the Town of Banff visitors can buy products they cannot find at home (19.5)	International Stay in the Town of Banff Stay in a hotel / motel Visit in June Women High school/ technical training or less On an organized tour	Other Canada Camping University Independent visit
There are plenty of outdoor recreational activities in the Town of Banff (63.8)	Stay in the Town of Banff	-



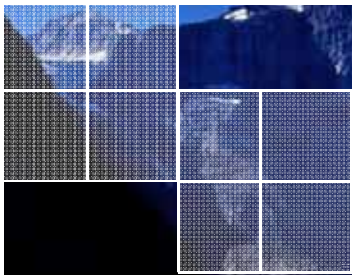
Differences between Segments for the Town of Banff Items

	More satisfied	Less satisfied
If you have children, you can enjoy a visit to the Town of Banff (63.5)	Stay in a hotel / motel	Camping
Regardless of the weather, you can enjoy a visit to the Town of Banff (40.8)	Stay in Canmore / Calgary Women	Men Camping
In the Town of Banff it is easy to select the kind of accommodation you want (45.0)	High school/ technical training or less	Camping Men University
The Town of Banff's streets and attractions are well signed (57.2)	Stay in a lodge or cabin / vacation home Women	
It is easy to go wherever you want in the Town of Banff by public transit (51.5)	Overnight stay Stay in a hotel / motel	Day trip
In the Town of Banff, the personnel in contact with tourists are very professional (59.6)	Overnight stay Stay in the Town of Banff 60 years old and over High school/ technical training or less	Day trip Children under 18 years old University
Tourist information in the Town of Banff is easy to find (69.6)	Stay in a lodge or cabin / vacation home	Children under 18 years old



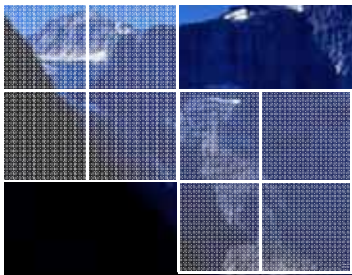
Differences between Segments for the Town of Banff Items

	More satisfied	Less satisfied
The Town of Banff provides visitors with very easy to use tourist maps and brochures (74.5)	Stay in a lodge or cabin / vacation home	
It is easy to get to the Town of Banff from the Calgary airport (77.6)	Stay in a Bed & Breakfast / hostel 60 years old and over	
It is easy to navigate around the Town of Banff when you arrive by car (52.2)	Stay in the Town of Banff Stay in a hotel / motel	Camping
Visitors to the Town of Banff feel they are in a very clean environment (79.4)	USA 60 years old and more Women	Children under 18 years old Men
In the Town of Banff you feel really safe (68.6)	USA International Overnight stay Stay in Canmore / Calgary Stay in a lodge or cabin / vacation home Visit in August 60 years old and over University	Regional Residents of Alberta Day trip Camping Visit in July Children under 18 years old High school/ technical training or less



Differences between Segments for the Town of Banff Items

	More satisfied	Less satisfied
Value for the money is very good in Town of Banff accommodations (-4.3)	Other Canada International Overnight stay Stay in the Town of Banff Stay in a hotel / motel 50 years old and over High school/ technical training or less	Regional Residents of Alberta Day trip Camping Under 30 years old University
Value for the money is very good in Town of Banff restaurants (7.0)	International 50-59 years old High school/ technical training or less On an organized tour	USA University Independently
Value for the money is very good in Town of Banff stores (-7.4)	Other Canada Overnight stay Stay in the Town of Banff Stay in a hotel / motel 50 years old and over High school/ technical training or less On an organized tour	Regional Day trip Camping Children under 18 years old University Independent visit

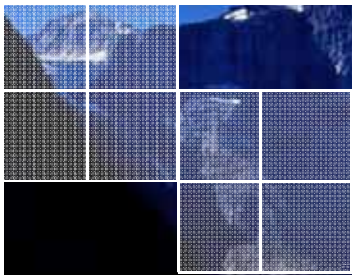


Differences between Segments for the Town of Banff Items

	More satisfied	Less satisfied
Value for the money is very good in the Town of Banff museums and paid tourist attractions (18.6)	Other Canada Stay in the Town of Banff 60 years old and over	Residents of Alberta Children under 18 years old
It is easy to find downtown parking spaces in the Town of Banff (-2.9)	International 40-49 years old	Regional Residents of Alberta Camping
Enough public washrooms are available in the Town of Banff (10.8)	International High school/ technical training or less	Regional University Professional / business owner



Differences in Satisfaction between Segments for Banff National Park Items



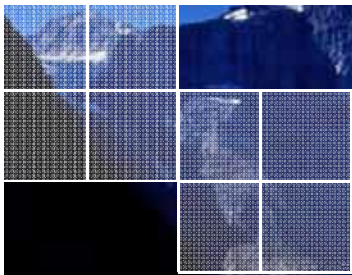
Differences between Segments for Banff National Park Items

- For each item, the following table shows the customer segments, depending on socio-demographics, where the differences are statistically significant compared to the overall mean.

Differences between Segments for Banff National Park

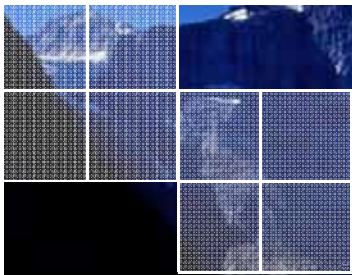
	More satisfied	Less satisfied
The beauty of Banff National Park scenery and landscape is unmatched (71.1)	USA Stay in a lodge or cabin / vacation 50 years old and over On an organized tour	Camping Under 30 years old Independent visit
There are many opportunities in the Park to learn about mountain culture and history (73.6)	On an organized tour	Independent visit
The chance to see wildlife is a distinctive experience in Banff National Park (59.5)	Visit in June	-
Easy access to Banff / Lake Louise lodgings and services greatly enhanced my Park experience (54.6)	Stay in the Town of Banff Women High school/ technical training or less	Camping Men University

Note : the score next to each item corresponds to the satisfaction index



Differences between Segments for Banff National Park Items

	More satisfied	Less satisfied
The road signs in Banff National Park make it easy to find one's way (60.2)	Visit in August	Visit in July
It is easy to find information about how to enjoy Banff National Park safely (68.7)	Stay in a lodge or cabin / vacation home	-
It is easy to follow Park rules about safety (75.2)	Other Canada On an organized tour	Independent visit
Banff National Park staff helped me make personal connections to the places I visited (40.3)	High school / technical training or less On an organized tour	International Camping University Independent visit
The quality of public facilities in the Park is good (62.9)	No children under 18 years old	-
Banff National Park is a great place to connect with nature (85.1)	-	Regional
The congestion at Park sites and attractions is acceptable (20.4)	Other Canada International	Regional Residents of Alberta
It is easy to find information about Banff National Park's attractions and activities (69.0)	Stay in the Town of Banff	-

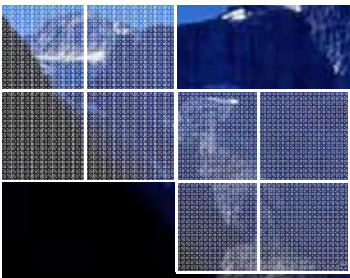


Differences between Segments for Banff National Park Items

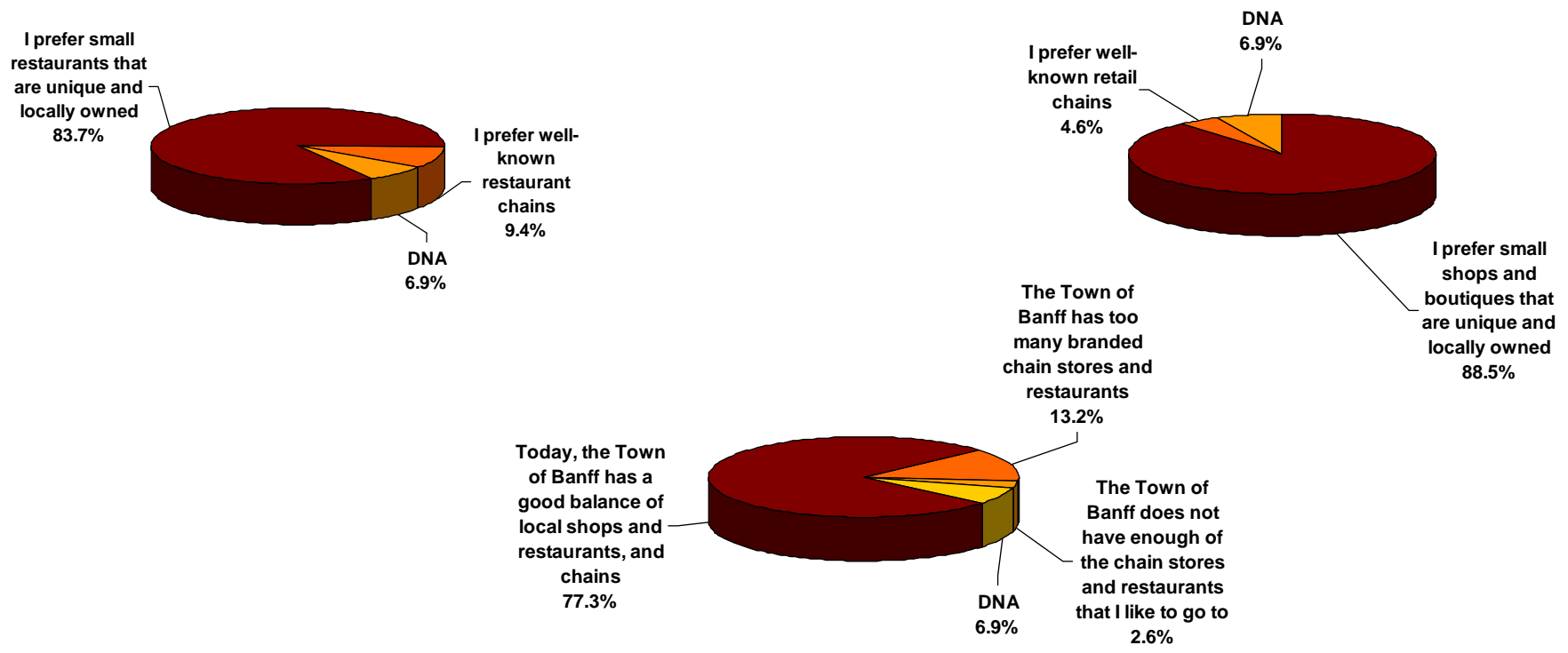
	More satisfied	Less satisfied
There is adequate access to food and services in the Park, outside of the Town of Banff (35.9)	High school/ technical training or less	Children under 18 years old University
Banff National Park is clean (85.8)	International Stay in a lodge or cabin / vacation home	Regional
Visitors to the Park can find the level of peace and relaxation that they want (74.3)	-	Camping
Special events held in the Park added to my experience (32.0)	Regional Residents of Alberta High school/ technical training or less	University
Banff National Park is enjoyable in all weather (35.6)	Visit in September Women	-
I could see that things are being done to keep nature healthy in Banff National Park (68.2)	USA Lodge or cabin / vacation home	Regional
While in Banff National Park, I was able to do something to help keep nature healthy (48.6)	Women	International Men
Banff National Park is an exciting place to visit (84.2)	-	Regional

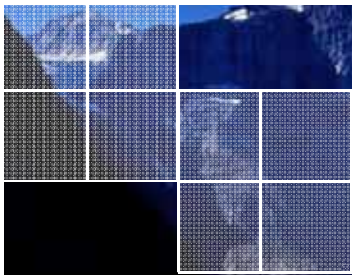


Specific Results



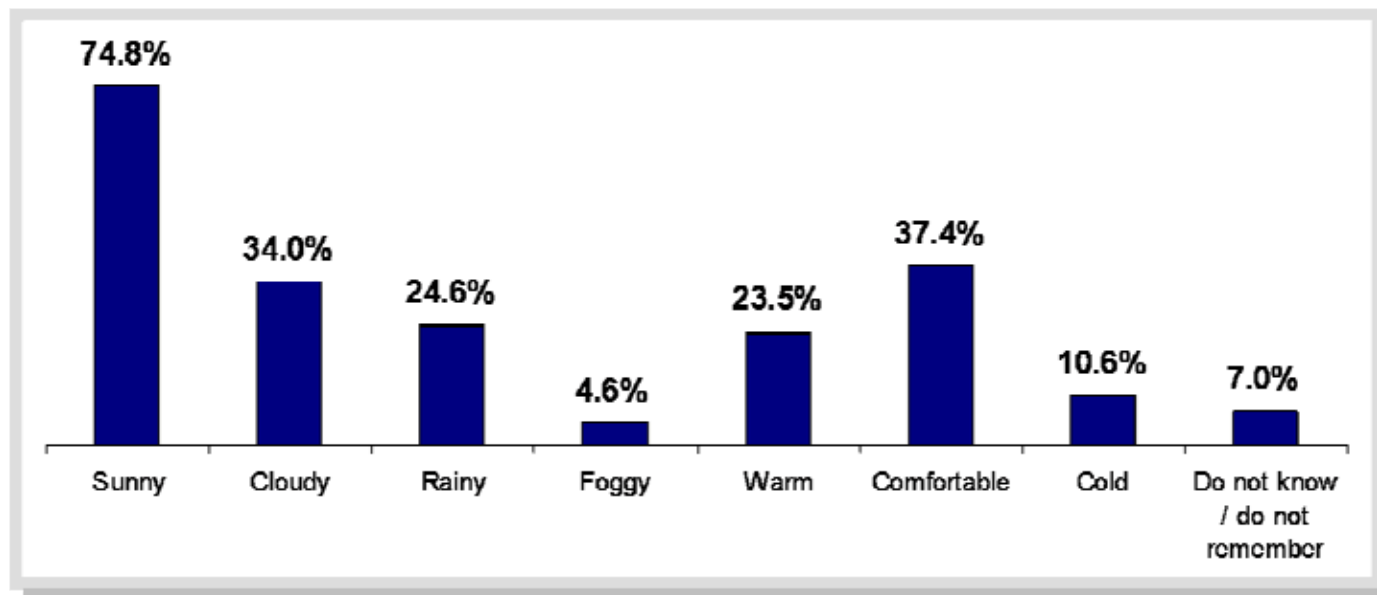
Most people prefer restaurants, shops and boutiques that are unique and locally owned and they consider that the Town of Banff has a good balance of local shops and restaurants, and chains.

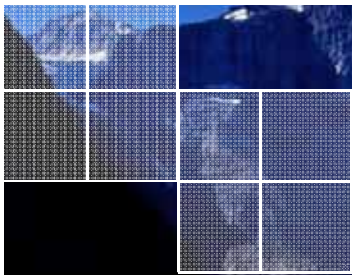




The weather was mostly sunny during respondents' trip although a quarter of them had a rainy stay

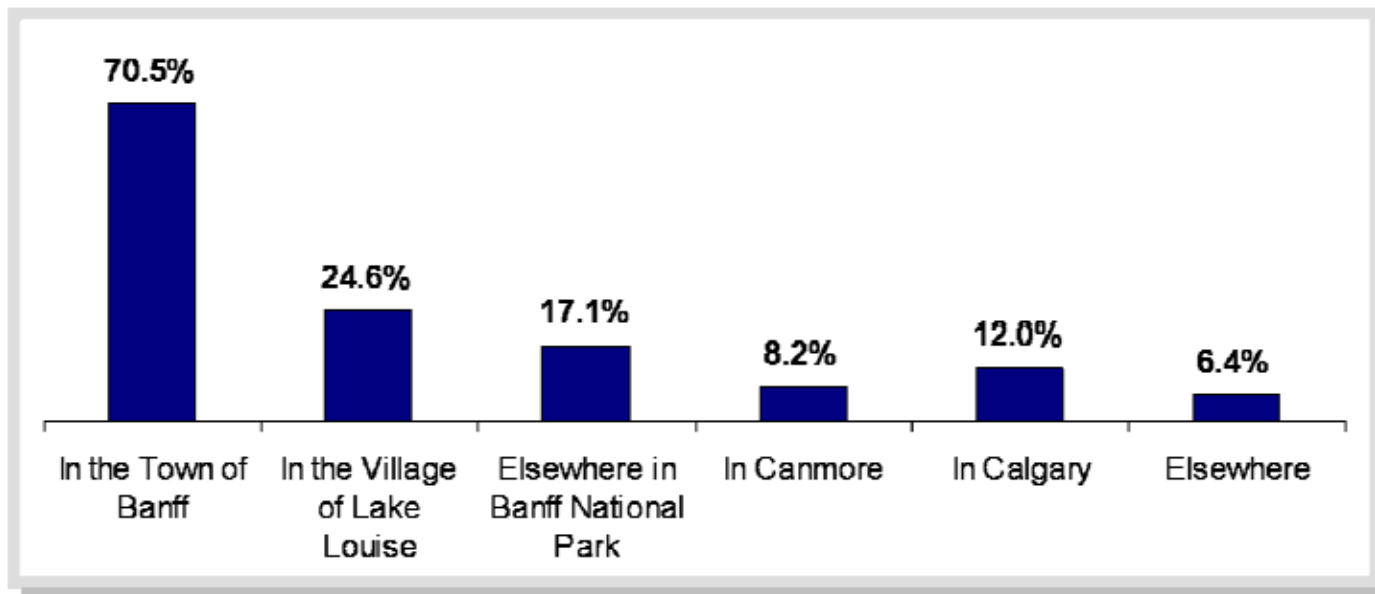
Generally during your trip, the weather was...

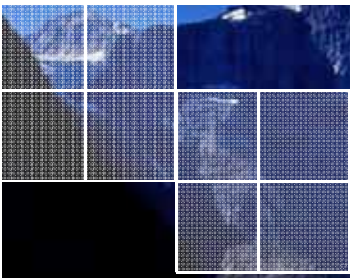




The majority of visitors stayed in the Town of Banff

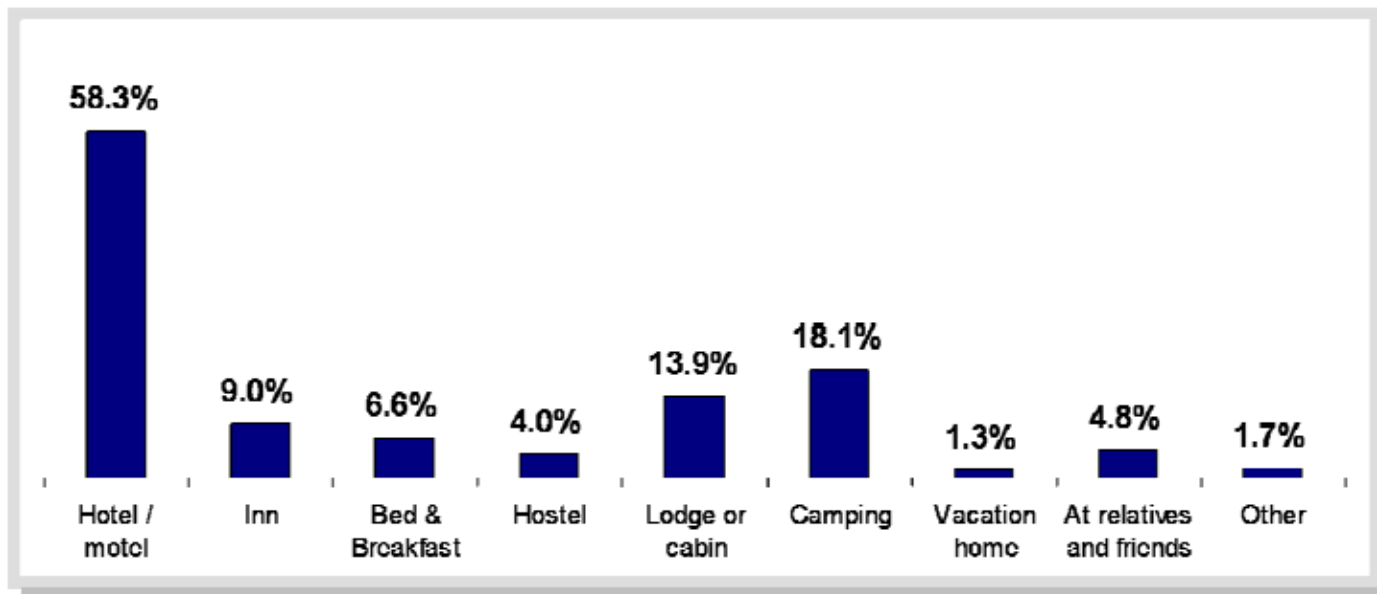
Where did you stay during your last trip to Banff National Park?





Over half of the respondents stayed in a hotel or motel

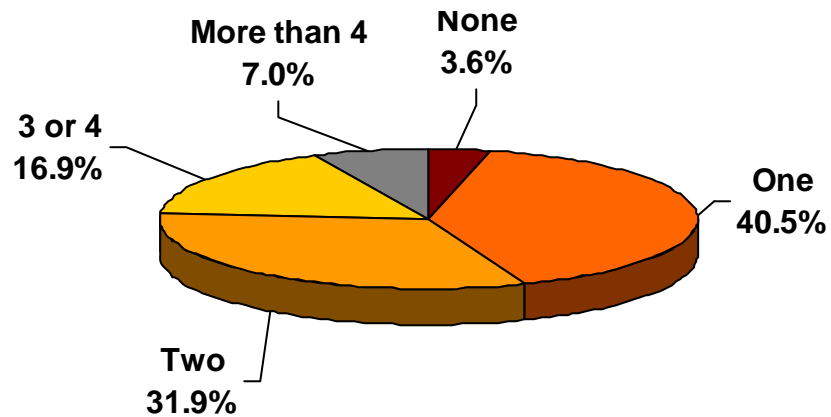
Type of lodging



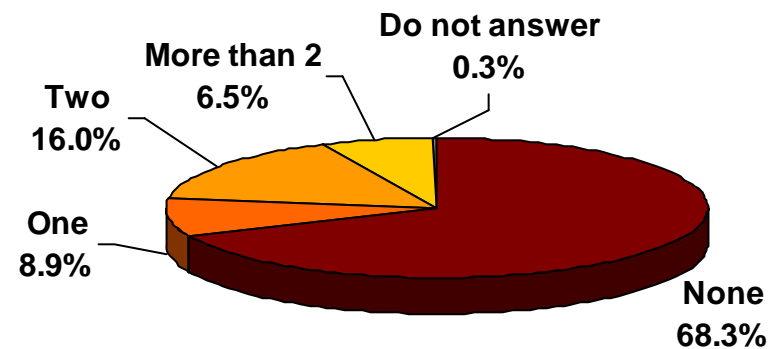


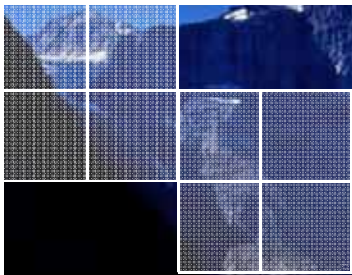
The vast majority of tourists travelled in a group of 2 or 3 adults without children

Number of adults with respondent



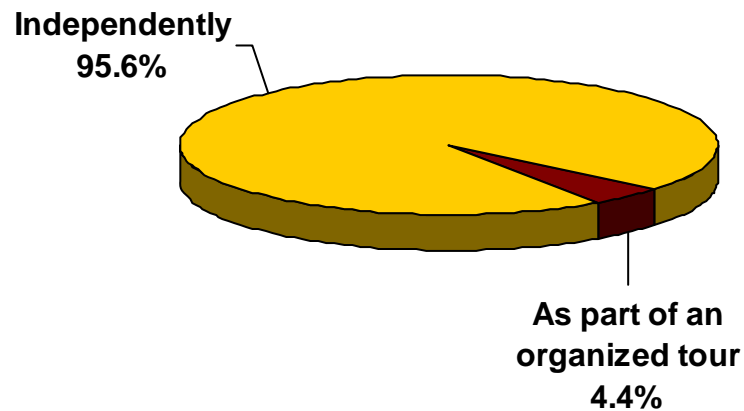
Number of children under 18 years old



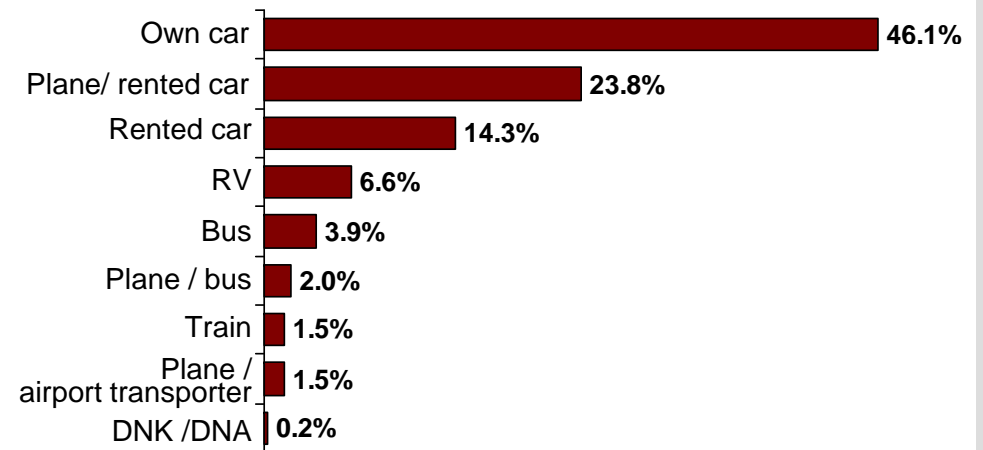


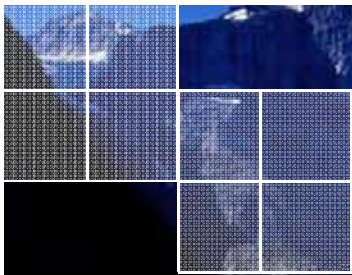
*Most visitors travelled independently,
by car or by plane and rented car*

Trip type



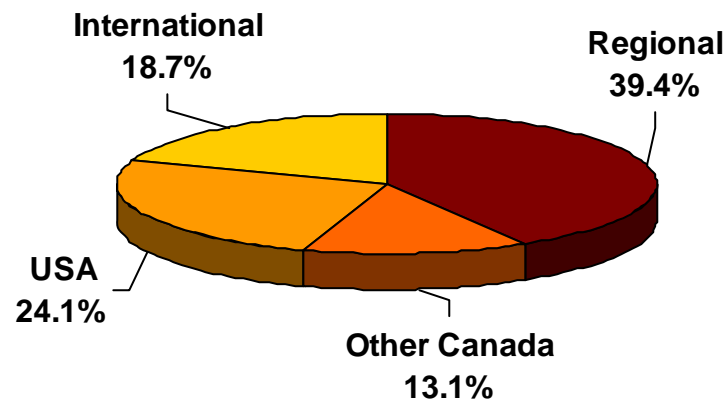
Transportation mode



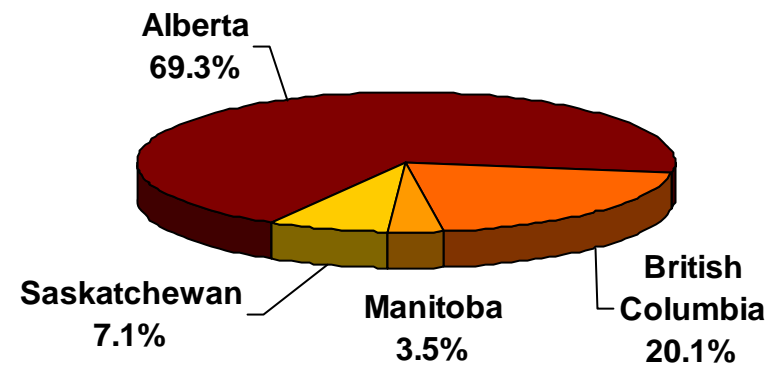


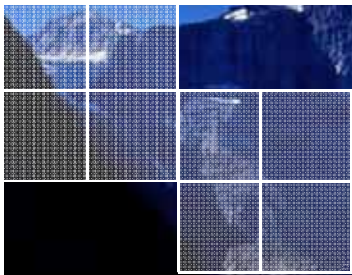
Half of the visitors come from Canada and a quarter from the United States

World

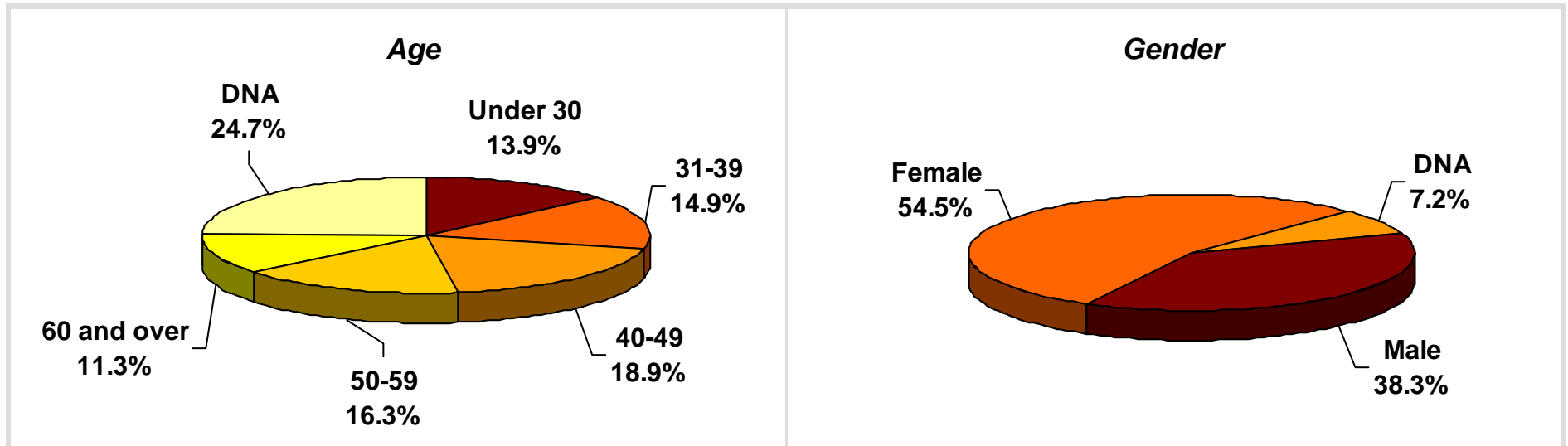


Regional



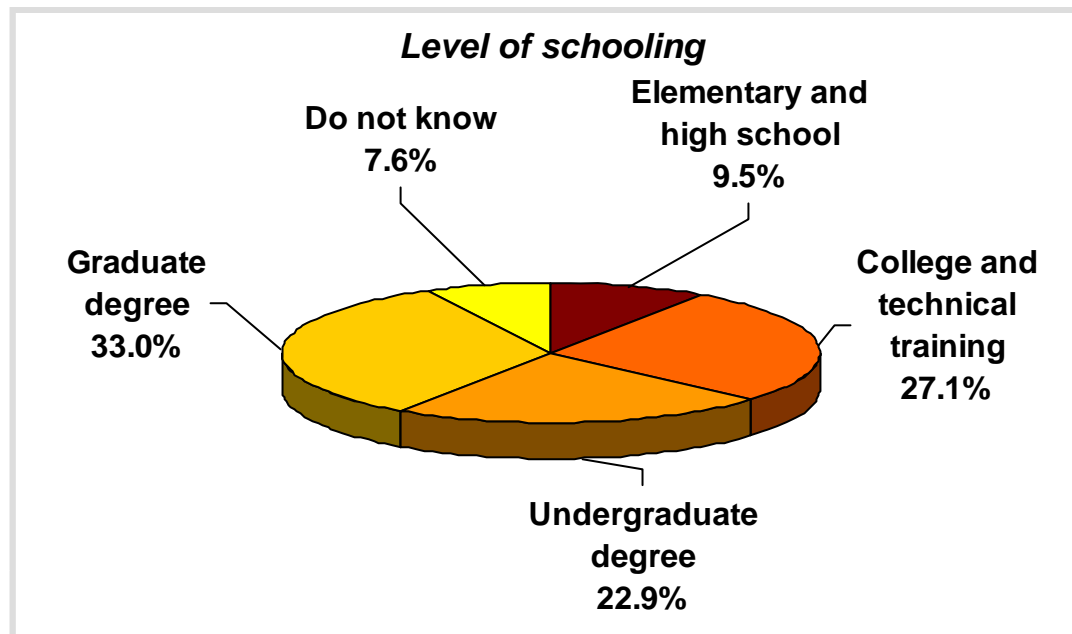


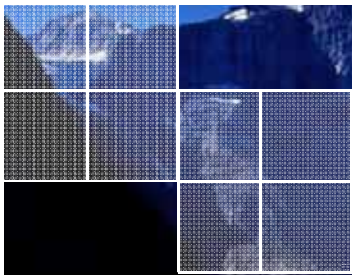
The average age of visitors is 44 years old although the different age categories are well-represented and women outnumber men



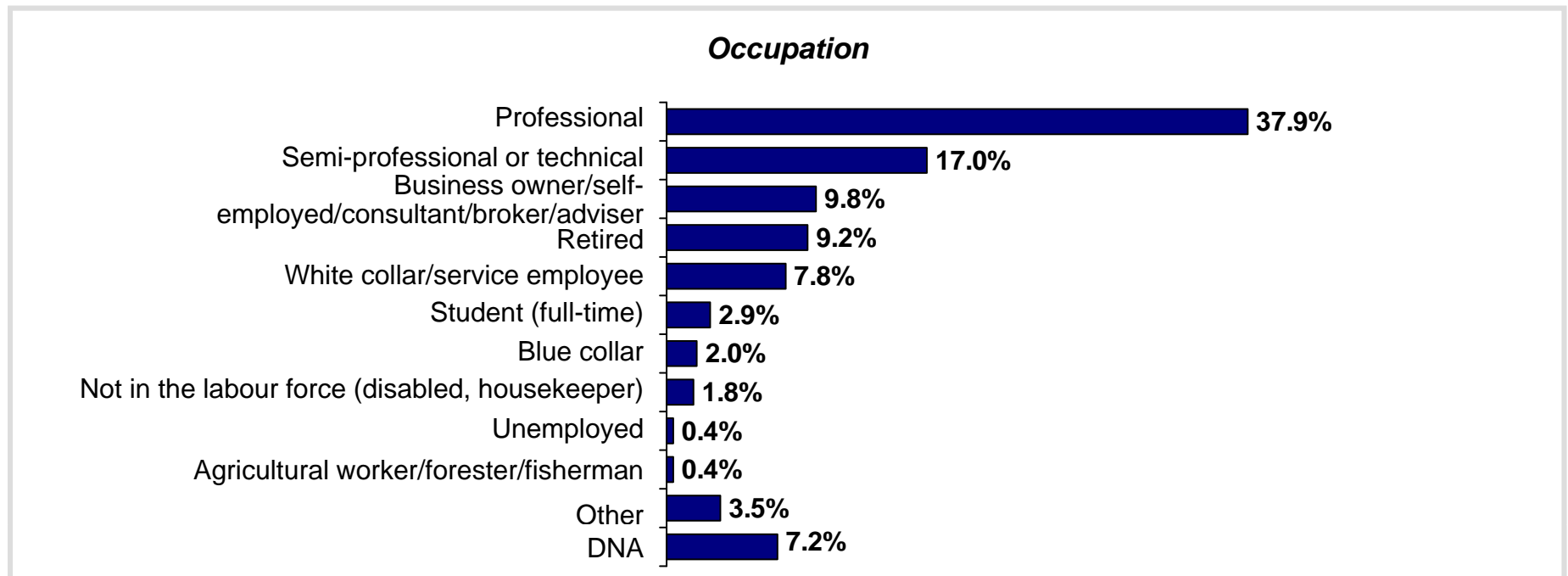


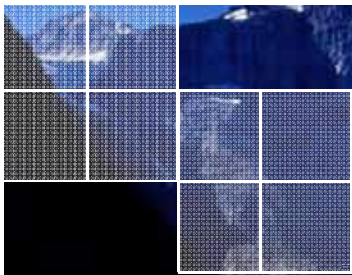
Respondents are highly educated



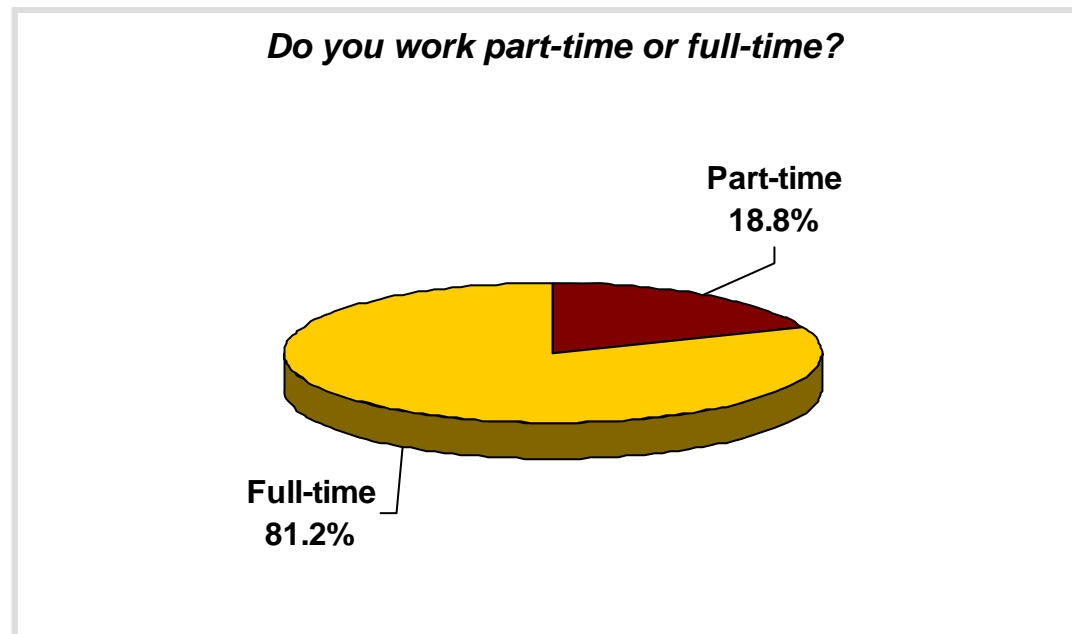


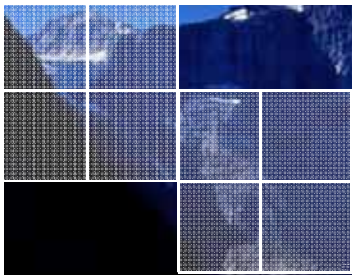
Over a third of the respondents are professional





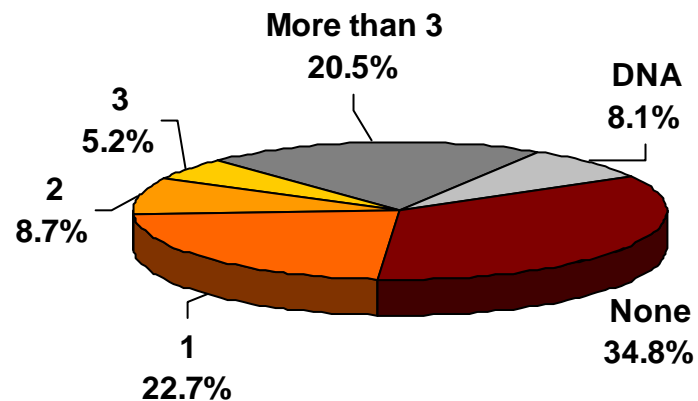
Most respondents work full-time





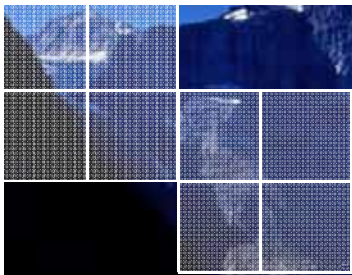
Over a third of the respondents had not visited Banff National Park over the last five years while a quarter had previously visited it 3 times or more

Number of previous overnight stays in the last 5 years





Explorer Quotient Segments



Most visitors to Banff National Park belong to the following 3 Explorer Quotient segments: Authentic Experiencers, Cultural Explorers and Free Spirits

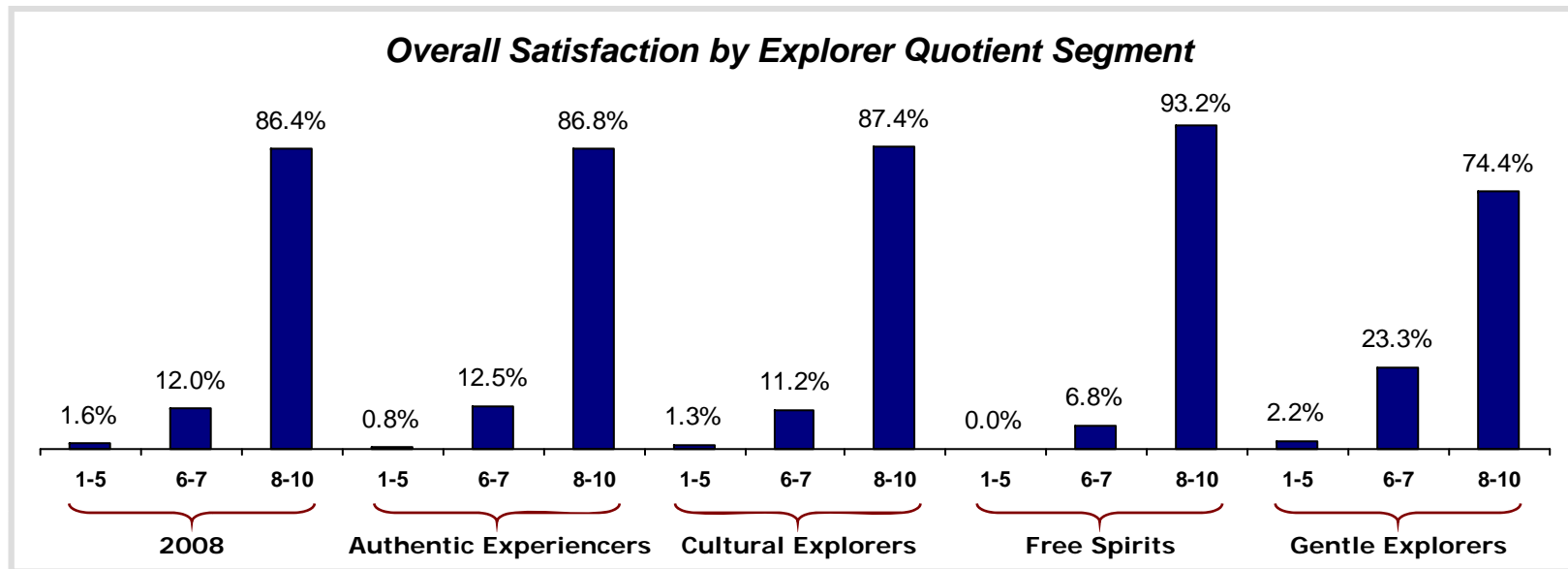
Explorer Quotient Segments

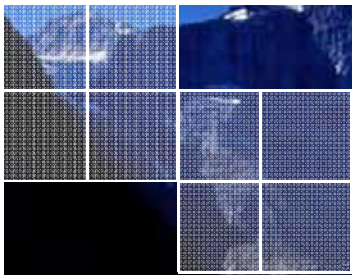
	Total	Regional	Other Canada	USA	International
Authentic Experiencers	27.7%	22.5%	33.1%	30.0%	33.5%
Cultural Explorers	24.1%	25.2%	18.2%	26.5%	23.7%
Free Spirits	21.6%	24.1%	19.8%	22.0%	17.3%
Gentle Explorers	9.7%	11.8%	9.9%	8.1%	5.2%
Rejuvenators	5.7%	5.5%	5.8%	6.7%	2.9%
Cultural History Buffs	5.4%	4.4%	2.5%	3.6%	11.6%
No Hassle Travellers	3.3%	4.1%	5.0%	2.2%	2.9%
Personal History Explorers	1.3%	0.8%	5.0%	0.4%	1.2%
Virtual Travellers	1.2%	1.6%	0.8%	0.4%	1.7%



A very high overall satisfaction among Free Spirits

- Gentle Explorers are somewhat less satisfied.





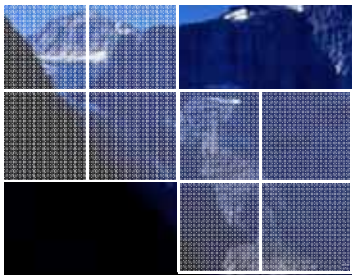
Striking Differences by Explorer Quotient Segment

GENTLE EXPLORERS

- Less satisfied with all elements of their Banff National Park experience (Q13)
- More negative perception of most of the Satisfaction with the Town of Banff items (Q14A)
- More negative perception of the Nature, Learning, Variety of activities and Atmosphere dimensions for Banff National Park

CULTURAL EXPLORERS

- More satisfied with the hot springs, the welcome at information centres and accommodation
- More positive perception of the Welcome and Convenience items (Town of Banff)
- More positive perception of the Variety of activities and Safety in Banff National Park
- More likely to plan to go back to Banff National Park in the next 5 years and to definitely recommend it to family and friends



Striking Differences by Explorer Quotient Segment (cont'd)

FREE SPIRITS

- More satisfied with the welcome at Park entrance
- More positive perception of the Welcome and Atmosphere items (Town of Banff)

AUTHENTIC EXPERIENCERS

- More satisfied with outdoor activities
- More likely to definitely recommend Banff National Park to family and friends