



2006 REGIONAL MARKET STUDIES: BRITISH COLUMBIA, ALBERTA & WASHINGTON STATE

**Prepared For:
Tourism British Columbia**

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Marketing Situation & Research Objectives

Tourism British Columbia maintains and periodically updates a base of knowledge about prospective visitors to British Columbia from North American origin markets through market studies. These studies examine prospects' travel patterns, interest in and attitudes toward travel to British Columbia.

In 2006 Roger Barnes Marketing Planning was commissioned by Tourism British Columbia to conduct market studies on British Columbia's three major regional markets: the BC domestic market, Alberta and Washington State.

This report presents the results of these studies. The report complements reports on studies of British Columbia's North American long haul markets, which will be published later in 2007, and recent and upcoming reports on key overseas markets.

For further information about this, and other market studies, please contact:

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Research Objectives

1. To improve Tourism BC's understanding of target markets' travel behaviour and attitudes to travel, especially:
 - Current leisure travel patterns.
 - Current travel decision-making and planning.
 - Priorities, needs and interests of BC travel prospects.
2. To develop profiles of relevant appropriate prospect travel target groups:
 - Demographic, travel and activity behaviour.
3. To determine travel experience with BC and attitudes to the province as a travel destination, especially:
 - Previous travel to BC.
 - Awareness, consideration of visiting BC and BC travel interest.
 - Attitudes and knowledge about BC.
 - Competitive destinations for prospect BC travellers.
 - Imagery of BC and BC brand positioning.
 - Interest in various types of leisure trips to BC.

Research Approach

The research took the form of 903 telephone interviews among a random sample of qualifying adults in the defined regional target markets: the BC domestic market and the nearby markets of Alberta and Washington State.

Interviews were initiated with a good quality random sample of over 400 residents aged 18 and over in each area. Initial screening questions determined if the respondent had taken an overnight leisure trip in the last year. Interviews with those not taking such a trip, about 30 percent, were discontinued.

Sufficient initial contacts were made (1,327 in total) to yield the desired sample of 300 qualified prospects in each of the markets.

Market	Traveller Incidence	Contacts Sample size
Washington	67%	300
Alberta	72%	302
BC	65%	301
Grand Total		903

Statistical significance limits on market samples of 300 are +/-6%, 19 times out of 20, but are larger on smaller sub-samples. Statistical weighting was used to balance each market contact sample to market population profiles with respect to age.

Fieldwork was completed in April 2006.

Summary and Conclusions

1. **British Columbia's primary competition for visitors from Alberta and Washington is domestic travel. Albertans have great interest in BC travel.**
 - BC has good top-of-mind presence in BC and Alberta for both vacations and getaways. Twenty-eight percent of Albertans volunteer considering BC for a vacation as do 25 percent for a getaway. One-quarter of BC residents are thinking of a BC vacation, and one-half are thinking of a BC getaway.
 - Washington residents are more restrained in consideration of BC leisure trips: ten percent volunteer considering a BC vacation, 14 percent a BC getaway.
 - For Albertans, domestic Alberta options are the most important competition for BC. BC residents are considering a wide range of vacation options. Washington State travellers show that the United States is the key competition for BC; US destinations are "first mentioned" for one-half of long-haul travellers' vacations and for sixty percent of getaways.
 - Regarding BC regions, Washington State prospects are mostly considering South-West BC. More Alberta and BC prospects include the South-West, the Thompson/Okanagan and BC Rockies in their plans.
 - Eighty percent of BC and Alberta prospects say it is very likely they will take a BC trip in the next two years, as do one-half of Washington travellers.

2. Washington State visitors to BC skew to older age, higher income, more education and more frequent travel, while Alberta and BC travellers are more mass-market.

- Sixty percent of the Washington travellers have visited BC in the last five years, as have 80 percent of Albertan travellers.
- Prior Washington visitation has been largely to Vancouver, Whistler and Vancouver Island, although 16 percent of past Washington visitors have been to Thompson/Okanagan in the past five years. Albertan and BC visitors have covered BC much more widely, especially the Thompson Okanagan and BC Rockies.
- Regular Washington visitors to BC (4+ times in 5 years) skew toward the older age groups, those with higher income and more education, and frequent travellers (seven leisure trips per year).
- Frequent Albertan visitor and BC resident tourists are less demographically distinct, other than that they are frequent leisure travellers.
- Traveller activities on overnight trips in BC vary. Washington visitors have largely made urban trips. Sightseeing, shopping, arts, plus skiing and other sports are the most frequent activities. Albertan and BC residents are more active outdoors – hiking, camping, other activities, ski, golf and other sports are more popular than urban pursuits.
- On leisure trips in general (not BC specific), the most popular outdoor recreation activities are hiking (day), camping, ski, golf, water sports and fishing. Principal “city activities” in all markets include shopping, sightseeing/attractions, restaurants, history/heritage and cultural activities.
- Forty percent of all travellers say they have taken an overnight leisure trip specifically for outdoor activities or sports in the last year, especially hiking, camping, skiing and golf.

3. Travel intent focuses on general touring. Washington visitors are interested in urban and outdoor activities, Alberta and BC travellers are more focused on outdoor activities.

- Among those saying they likely will or might travel to BC in the next two years, Albertans are thinking more of trips that average a week long, while most Washingtonians are thinking of a trip up to three nights.
- The South-West of the province is uppermost in Washington prospects' regional thinking, but the Thompson Okanagan is strong in Albertans' and BC residents' travel intentions.
- General touring activities – sightseeing, relaxing and VFR – are strong among prospect visitors' intentions for what they will do in BC. While these general intentions are uppermost for half or more of prospects, specific urban and outdoors activities are also significant. For American visitors, some specific urban activities, especially shopping and sight-seeing are planned, along with some outdoor activities, especially hiking and various other specific activities. Albertan visitors and BC residents are more focused on VFR and the out-of-doors: hiking, various outdoor pursuits, camping, fishing and golf.
- When asked which other destinations they would consider for a trip similar to a BC trip, two-thirds or more in each market could not think of a similar destination. For Washington travellers, the Pacific North-West US and other US destinations come to mind. Albertans and BC residents also add in Alberta.

4. Qualified travel prospects' top-of-mind impressions of BC and its uniqueness are BC's scenery, beauty, mountains, water, forests and nature, and (for Washington) its people.

- The top-of-mind "impressions about BC – what would you find if you went there for a vacation" are very consistent across the three major markets covered in this research. In each market the scenery, the beauty, mountains, water and forests are the strongest volunteered impressions, except Washingtonians mention mountains and oceans/water less, reflecting their own state's similar attributes, perhaps.
 - For the most part, more frequent visitors and non/lighter visitors have similar perceptions, although the depth of impressions is greater among the visitors than the others.
 - Secondary impressions include things to do, good weather and the people in BC. Canadians focus more on the good weather, while Washingtonians comment more on BC's people.
 - Perceptions of the uniqueness of British Columbia are critical elements of understanding the BC brand's positioning, summarizing how the province differs from other travel destinations.
- In all three markets, BC's scenery is a top-of-mind feature in making BC unique. Alberta and BC have very similar perceptions of what makes BC different – in addition to the scenery, the mountains, nature, climate and ocean/water are cited. For Washington, the specifics of the province's physical attributes are less distinct, attention being most on scenery and the people/culture (15% volunteered each). As above, the perceptions of uniqueness among frequent visitors and others are largely the same, except that the frequent visitors mention more differences than the others.

5. British Columbia's imagery versus competitive destinations among BC and Alberta residents show major advantages for BC on scenery and outdoor recreation, plus being relaxing. Washington's perceptions of BC's major strengths are feeling different from home, safety and friendly people.

- Destination brand imagery was also probed by asking whether BC or another destination is better on each of 16 attributes. For Alberta and Washington the point of reference is their domestic jurisdiction. For BC comparisons are drawn against the first-mentioned other destination each respondent volunteered considering visiting for a trip similar to a BC trip, forty percent volunteering such a destination. Results are presented as **"BC advantages"**: the percentage point difference between those thinking BC is better and those thinking the other destination is better.
- In BC and Alberta, BC has dominating advantages of +25 or higher on: beautiful, natural scenery; being a good base for outdoor activities; and being a good place to relax and unwind. BC residents also see similarly strong advantages in terms of visiting parks, being safe and clean and having plenty for children. Albertans also see BC as being very different

from home, but see BC at a major disadvantage for value for money, shopping and heritage.

- Washington's perceptions of BC's competitive strengths are divergent from the other regional markets and from the usual imagery seen in long-haul markets. While the scenery, nature and forests are prominent in perceptions of BC, they are not seen as major BC competitive advantages, as Washington's own geography likely makes BC less distinct. For Washingtonians, BC's best advantages (over Washington) are "feels quite different from home" (+65) and good value for money (+32), while scenery (+13) is still a small BC advantage. Things to do and things to appeal to children are BC's leading weaknesses.
- More frequent visitors from Alberta have similar attitudes to overall, while regular Washington visitors (twice or more in five years) see BC advantages of at least 20 points on difference from home, value for money, being safe, relaxing, friendly people, being exciting and beautiful natural scenery.

6. Three types of trips to BC are much more motivating than others in each market – trips to experience BC's scenery and nature, for outdoor recreation and for national/provincial parks.

- In all three markets, the three leading trip ideas in terms of interest in visiting BC to see/experience are BC's scenery and nature (56% or more very interested), outdoor recreation (40% or more) and national and provincial parks (40% or more). Canadian markets show stronger interest in outdoor recreation and parks than the Washington market. However, in Washington and the other two markets, interest in these three trip types is ten percentage points or more higher than any of the other seven ideas researched. The same interest is evident among those prospect visitors who had been considering a BC trip.
- The other seven ideas, with approximately half the level of interest as scenery/nature and outdoor recreation, can still be very appealing ideas, either to a specific segment (e.g., skiing) or as an element of another trip, (e.g., arts, night-life and experiencing BC's cultural mosaic).

- 7. The Internet has become the dominant “first source” in trip planning, with word-of-mouth, guides, travel agencies, tourism bodies and auto associations having secondary roles.**
- Fifty-three percent of travellers would consult the Internet as their first step in planning a BC trip, five times the importance of word-of-mouth, the second most important source. In total, seventy percent volunteer they would use the internet.
 - Secondary sources, mostly mentioned as follow-up sources, are word-of-mouth (34%), guide books and travel guides (20%), Tourism BC and similar (15%), auto associations (12%) and travel agents (11%).
 - On an aided basis, about two-thirds would look for special accommodation offers and over one-half would use travel guide books and would request travel guides.

Review of Main Findings

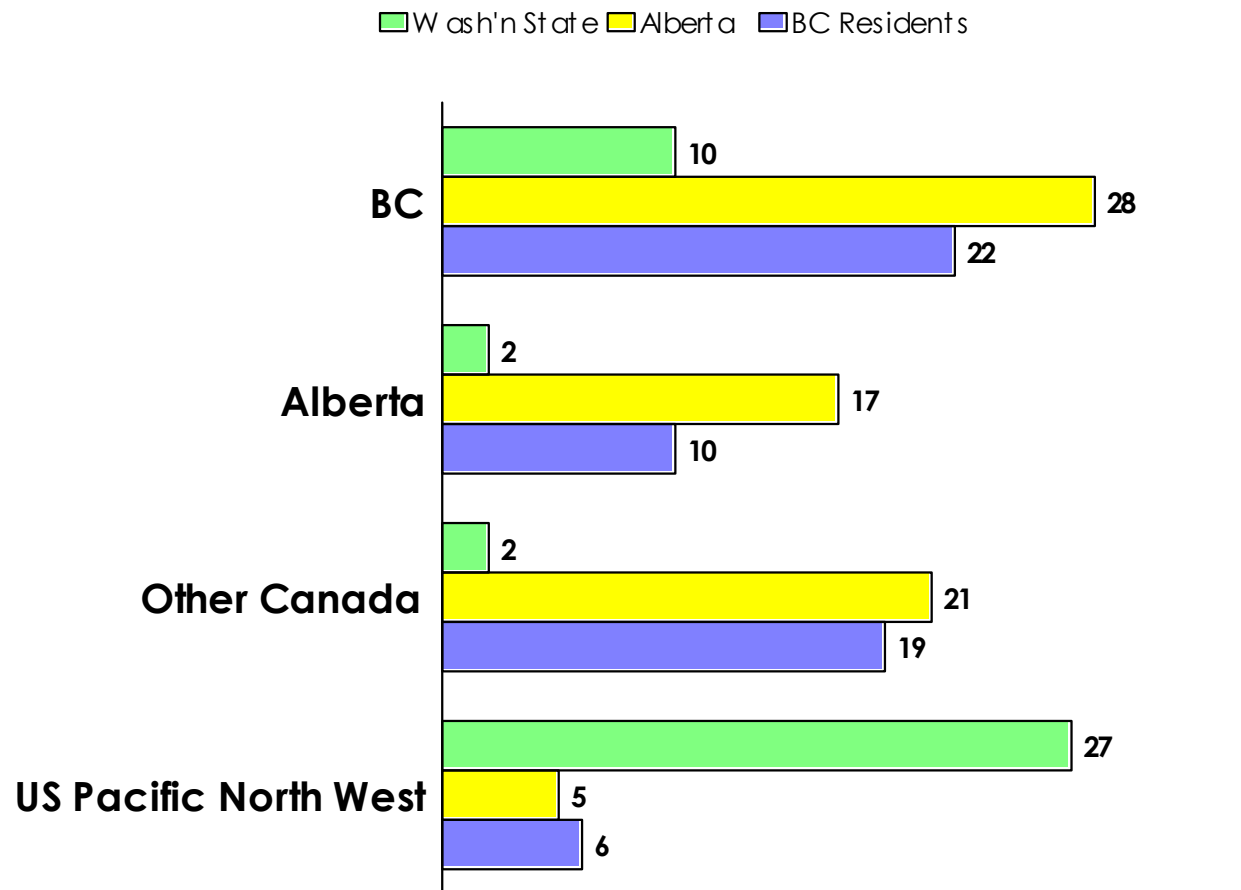
A. Vacation and Getaway Intentions

Notes on all Tables and Charts

- All numbers on charts and tables are percentages of all respondents unless otherwise noted.
- Numbers at the tops of columns above a percentage sign are the base size for the column.
- Graphic charts are often simplified. More detail is shown on the tables following each.
- Volunteered responses indicate an open-ended question in which respondents' answers were categorized with like comments.
- Some tables show only major responses.

Destinations Considering for Vacation

Selected Responses: Total Mentions

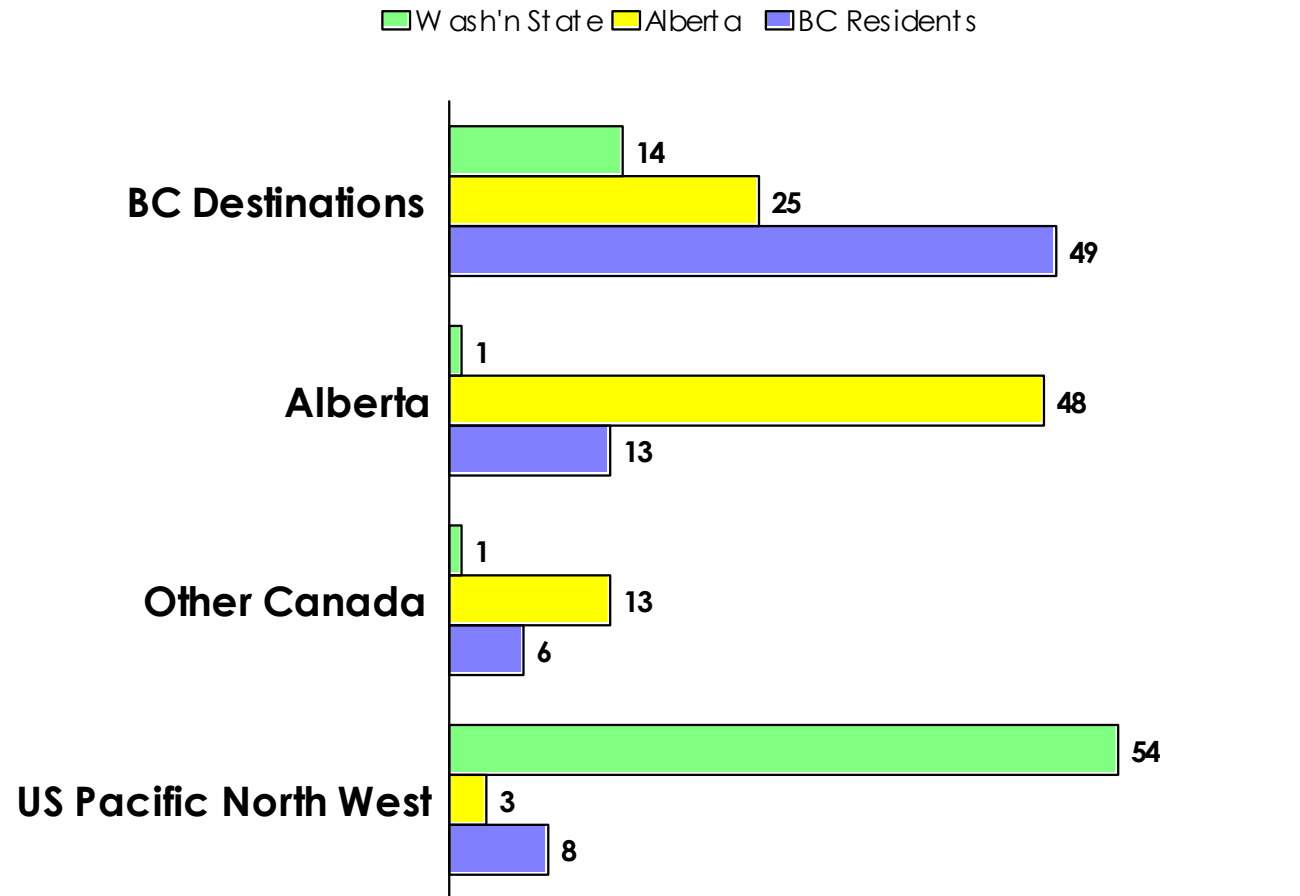


Destinations Considering for Vacation

Base	Wash'n	Alberta	BC
	300	302	301
FIRST MENTIONS	%	%	%
BC	5	17	13
Alberta	1	10	5
Other Canada	1	11	11
US Pacific North West	13	2	2
Hawaii	12	5	5
Other US	28	14	11
Europe	6	9	15
Mexico/S. & C. America/Caribbean	10	13	13
Other	7	4	5
TOTAL MENTIONS (Selected)			
BC	10	28	22
Alberta	2	17	10
Other Canada	2	21	19
US Pacific North West	27	5	6

Destinations Considering for Getaway

Selected Responses: Total Mentions



Destinations Considering for Getaway

Base	Wash'n	Alberta	BC
	300	302	301
FIRST MENTIONS	%	%	%
BC	9	16	42
Alberta	-	39	6
Other Canada	-	8	2
US Pacific North West	34	2	4
Nevada	8	3	3
Hawaii	2	-	1
Other US	14	2	4
Europe	-	1	1
Mexico/S. /C. America/Caribbean	1	2	2
Other	3	2	1
TOTAL MENTIONS			
BC	14	25	49
Alberta	1	48	13
Other Canada	1	13	6
US Pacific North West	54	3	8

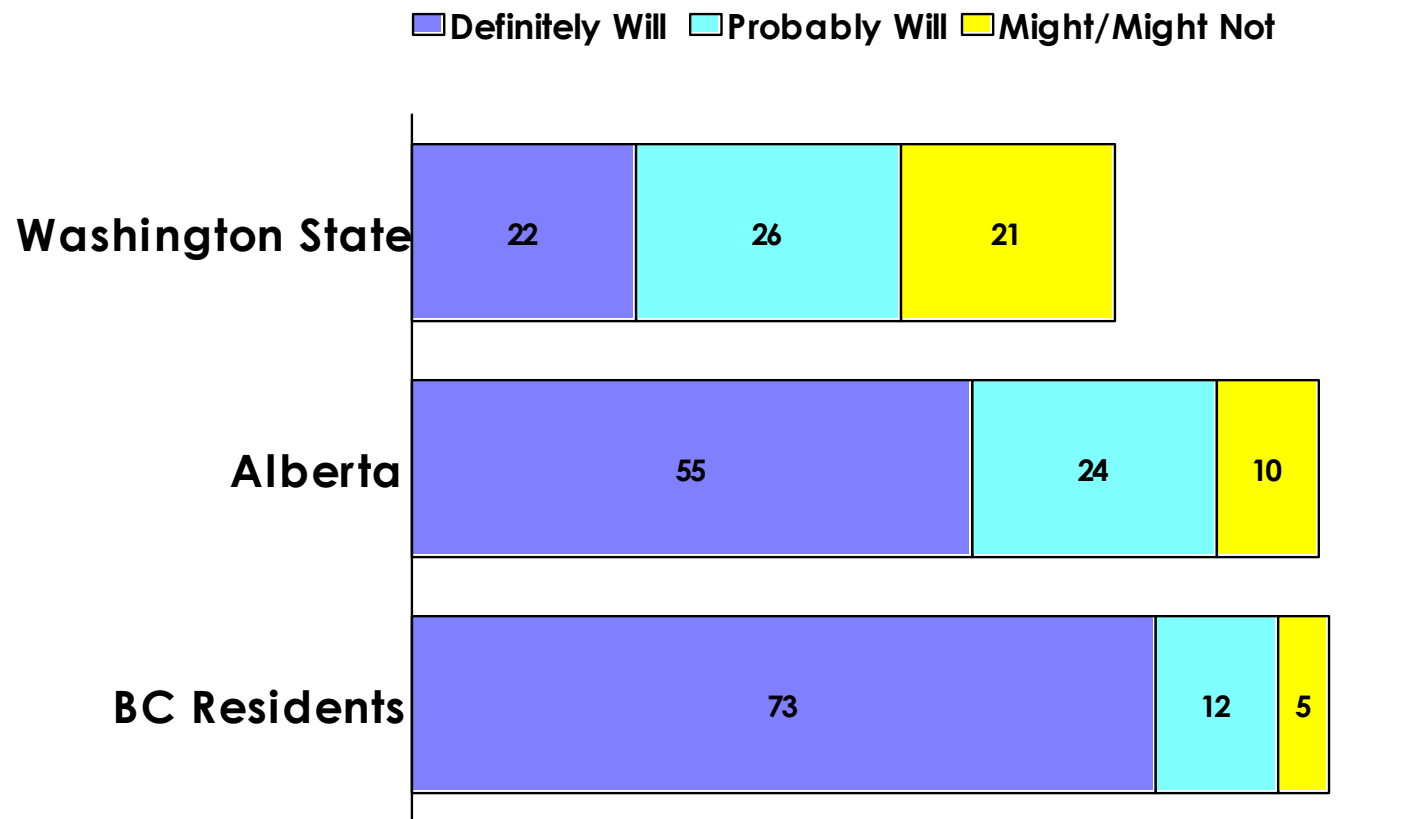
BC Destinations Considering for Vacation or Getaway

Among Those Volunteering Considering BC

Base	Wash'n 41 %	Alberta 112 %	BC 135 %
Vancouver, GVRD, Fraser Valley	34	23	31
Whistler	18	1	17
Victoria	25	12	18
Vancouver Island	5	9	23
Thompson Okanagan	5	26	33
Cariboo/Chilcotin	-	3	6
Northern BC	3	2	12
BC Rockies/Kootenays	2	20	14
Other	2	4	4
Not know	5	1	3

Likelihood of Taking BC Leisure Trip

In Next Two Years: Aided



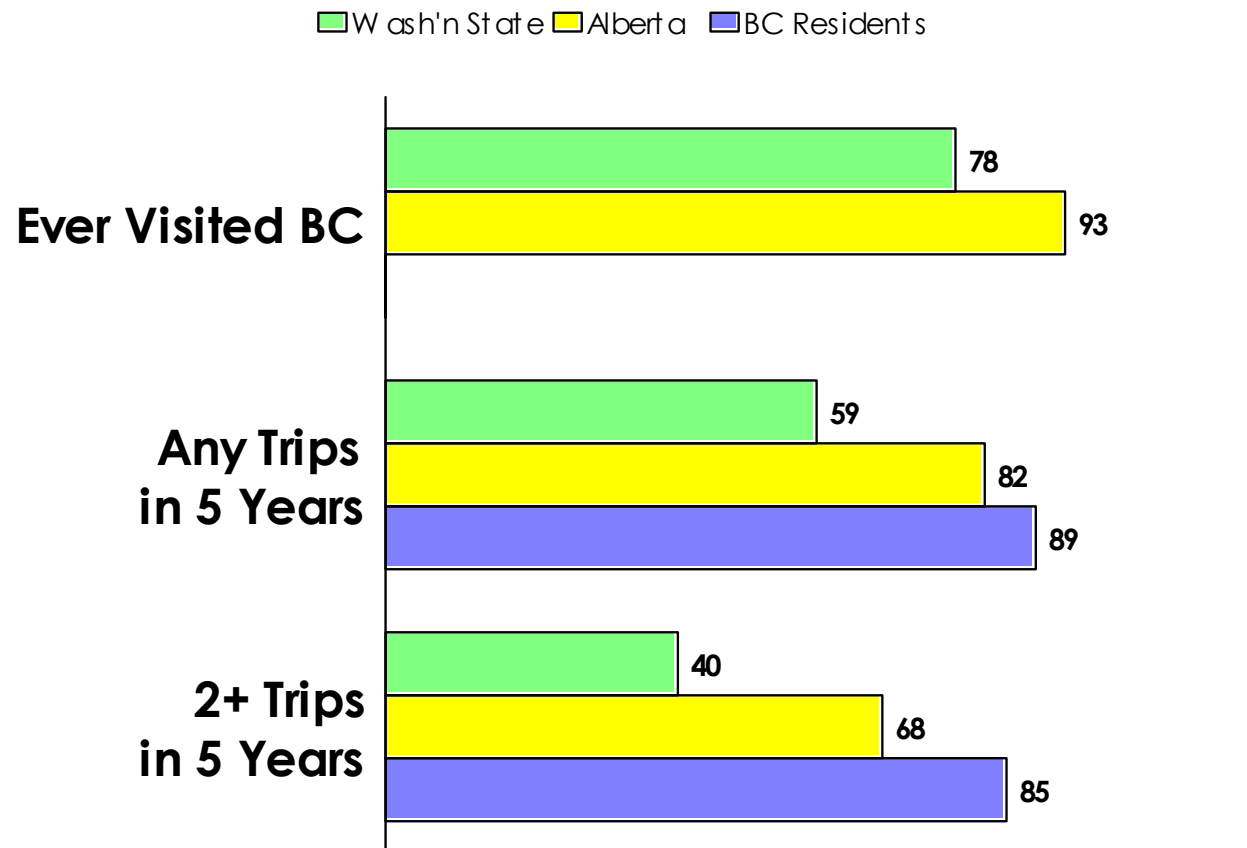
Likelihood of BC Travel

Base	Washington 300 %	Alberta 302 %	BC 301 %
Thought about taking leisure trip to BC in past year	51	73	
Likelihood Take Leisure Trip to BC in Next Two Years			
Definitely	22	55	73
Probably	26	24	12
Might or might not	21	10	5
Probably not	21	8	4
Definitely not	10	3	3

B. Past BC Visitation

Past Visitation of British Columbia

% of Travellers in Each Market



Past Visitation of British Columbia

Base	Wash'n 300 %	Alberta 302 %	BC 301 %
Ever Visited	78	93	
Any in 5 Years	59	82	89
2+ in Years	40	68	85
5+ in 5 Years	15	42	62

Past Visitation of British Columbia Regions & Other Destinations

	In 5 Years – Aided		
	Washington	Alberta	BC
% of Past BC Visitors (Ever)	250 %	281 %	257* %
Vancouver, GVRD/Fraser Val.	61	50	63
Whistler	22	11	35
Victoria	50	40	54
Vancouver Island	32	39	65
Thompson Okanagan	16	48	56
Cariboo/Chilcotin	6	6	26
Northern BC	7	13	21
BC Rockies/Kootenays	13	58	38
Ever Visited Other Destinations – Aided			
% of all	300 %	302 %	301 %
Ever visited Alberta	29		88
Ever visited Washington		10	79
Ever visited Oregon	90	8	65
Ever visited any Canadian provinces other than BC	38		

* BC – Base = Taken overnight BC trip in 5 years

Canadian Provinces Visited (Ever)

Base	Washington 300 %
Visited (Aided)	
BC (Aided)	78
Alberta (Aided)	29
Any Other than BC (Aided)	38
Others Visited (Volunteered)	
Alberta	17
Saskatchewan	8
Manitoba	9
Yukon/NWT/Territories	2
Ontario	17
Quebec	10
New Brunswick	4
Nova Scotia	5
Newfoundland/Labrador	2
PEI	2
Not sure which	3

Activities on BC Overnight Trips

	Wash'n	Alberta	BC
Ever visited (* See BC note on p. 23)	250 %	281 %	257 * %
General sightseeing	38	24	17
Relaxing	7	8	6
Visiting friends / relatives	6	23`	19
Shopping	25	9	13
Arts/Culture	12	4	9
City/Town Sightseeing	17	6	7
Gambling	1	-	3
Walking	4	7	7
Dining	6	3	3
Hiking	8	17	19
Camping	3	20	19
Fishing	6	6	12
Hunting	1	2	2
Other outdoors act's, wilderness	8	15	11
Boating	1	5	5
Canoeing/kayak	1	1	6
Skiing	10	13	15
Golfing	2	18	12
Cycling	1	3	5
Swimming	1	6	5
Participate in Other Sports	10	8	16
Watching sports	1	1	3
Attending fairs/festivals	3	2	2
Other	3	2	3
Nothing in particular, not know	14	7	1

Profile of Regular BC Visitors in Last 5 Years

	<u>Washington</u>		<u>Alberta</u>	
	Total	Been BC 4+	Total	Been BC 4+
Base	300 %	66 %	302 %	149 %
Male	48	53	50	56
Female	52	47	50	44
Aged 18 - 34	31	23	33	30
35 - 54	44	43	44	49
55 or over	25	34	23	22
Under \$65,000 income	46	36	37	25
\$65,000 – \$99,999	27	28	34	38
\$100,000 plus	26	34	29	37
School only	24	11	27	26
Some college, university	31	31	31	29
University degree	44	57	41	44
Average # vacations last year	1.9	2.6	2.2	2.8
Average # getaways last year	3.3	4.6	3.6	5.0
Average # overnight trips last year	5.2	7.2	5.8	7.8
Children (0-18) in home	40	32	43	42

Profile of Regular BC Travellers in Last 5 Years

	<u>BC Residents</u>	
	Total	Been 5+ Trips
Base	301 %	186 %
Male	49	51
Female	51	49
Aged 18 - 34	31	29
35 - 54	40	42
55 or over	29	29
Under \$65,000 income	45	39
\$65,000 – \$99,999	30	32
\$100,000 plus	25	29
School only	23	22
Some college, university	33	32
University degree	42	46
Children in home	34	32
Average # vacations last year	2.5	2.6
Average # getaways last year	3.8	4.5
Average # overnight trips last year	6.3	7.1

THE FOLLOWING PAGES PROBE ACTIVITIES ON TRIPS IN GENERAL – NOT DESTINATION SPECIFIC
Outdoor Recreation Adventure Activities on Vacations/Getaways

Not Destination Specific	Wash'gton	Alberta	BC
<i>Volunteered Major Mentions</i>	300 %	302 %	301 %
Hiking, Backpacking – Day	39	38	38
Hiking, Backpacking – Overnight	9	7	7
Camping	22	22	15
Visiting parks	7	4	5
Watching wildlife	4	5	4
Freshwater fishing	16	14	8
Saltwater fishing	3	4	4
Hunting	3	3	1
Biking –Mountain	9	5	10
Biking – Other	6	6	4
Horseback riding	5	4	3
Kayaking/canoe	7	8	11
Sail or power boat	7	7	7
Skiing: Boarding – Downhill	11	15	11
Skiing: Cross-country	2	4	2
Golf	6	19	14
Other water-sports, beach	17	20	4
Walking	2	4	7

City Activities on Vacations/Getaways

Not Destination Specific	Washington	Alberta	BC
Volunteered	300 %	302 %	301 %
Sight-seeing, attractions	32	31	30
Shopping	44	36	36
History, heritage, museums	21	16	20
Culture, arts, theatre, galleries	22	14	27
Restaurants	27	23	26
Clubs, nightlife	10	13	9
Casino, gambling	2	1	2
Walk, walk around	8	9	7
Gardening, parks	5	4	5
Participate in sports	3	5	3
Watch (pro) sports	2	2	4
Swimming, pool, beach	4	6	4
<i>Major mentions</i>			

Taken Overnight Leisure Trip Specifically for Outdoor Activities, Sports

Not Destination Specific	Washington 300 %	Alberta 302 %	BC 301 %
Taken any overnight trip for Outdoor Activities, Sports in 2005	38	43	40
Principal Volunteered Activities Among Participants	115 %	129 %	117 %
Hiking	24	11	15
Camping	17	16	10
Freshwater fishing	12	7	12
Saltwater fishing	7	2	7
Hunting	3	4	2
Bicycling	4	3	6
Boating	5	5	5
Kayak	5	3	2
Rafting	1	2	-
Sailing	2	1	1
Snowmobiling	2	4	-
Surfing	-	1	3
Swimming	10	4	6
Skiing: Boarding – Downhill	8	23	21
Skiing: Cross-country	5	7	6
Golf	8	21	15
Baseball	4	5	9
Hockey	1	5	6
Soccer	4	2	3

C. BC Leisure Trip Interest and Characteristics

Likely BC Leisure Trip Characteristics

Likely or might travel to BC		Wash'n 209 %	Alberta 269 %	BC 268 %
Nights Likely Spend in BC	1 – 3 nights	68	20	50
	4 – 6 nights	20	37	27
	7+ nights	8	42	21
	Not know	5	1	3
	Average nights	3.4	6.6	4.6
Only BC or Also Elsewhere	Only BC	68	73	66
	Also Travel across US	4	5	9
	Alaska/Cruise	3	-	1
	Also US Pacific NW	7	6	3
	Also Alberta	7	12	13
	Also Across Canada	3	2	6
	Other	2	2	4
	Not know	14	4	3
Month Travel	Dec/Jan/Feb	6	4	
	March/April/May	12	10	
	June/July/August	60	73	
	Sept/Oct/Nov	17	10	
	Not know	5	3	

Likely BC Leisure Trip Characteristics

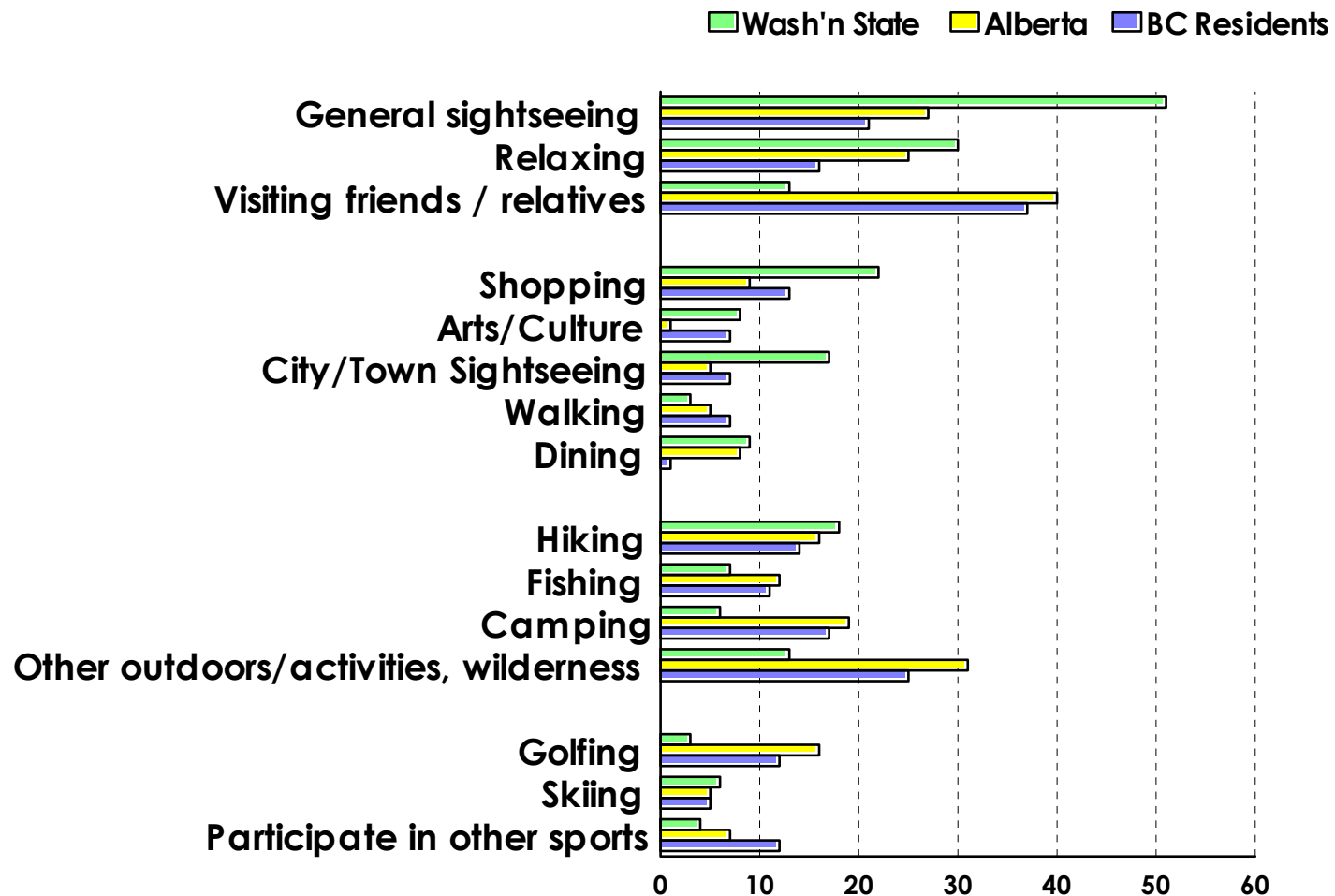
Likely or might travel to BC		Wash'n 209 %	Alberta 269 %	BC 268 %
Travel Mode	Air	4	16	
	Car/Truck/Van	81	77	
	RV	2	4	
	Bus/Coach	-	1	
	Train	3	-	
	Boat, ferry	5	-	
	Cruise		-	
	Other	3	-	
	Not know	-	1	
BC Destinations	Vancouver, GVRD/Fraser Val.	40	28	22
	Whistler	12	2	8
	Victoria	32	15	9
	Vancouver Island	16	19	18
	Thompson Okanagan	9	41	34
	Cariboo/Chilcotin	3	3	4
	Northern BC	5	5	7
	BC Rockies/Kootenays	9	24	11
	Other	3	3	4
	Not know	14	3	4

Likely One Main Purpose or Activity on BC Trip

Likely or might travel to BC	Wash'tn 209 %	Alberta 269 %	BC 268 %
General sightseeing	27	11	9
Relaxing	24	18	9
Visiting friends / relatives	9	32	28
Shopping	1	1	3
Arts/Culture	1	-	2
City/Town Sightseeing	7	1	2
Walking	1	1	1
Hiking	5	3	3
Fishing	4	3	3
Camping	1	6	9
Other outdoors/activities/wilderness	4	10	7
Golfing	2	6	5
Skiing	4	2	3
Participate in other sports	1	3	4
Attending fairs/festivals	2	-	2
Other	4	2	8
Nothing in particular, not know	3	2	2

Activities on Likely BC Trip

Total Volunteered



All Activities Volunteered on BC Trip

	Wash'n 209 %	Alberta 269 %	BC 268 %
Likely or might travel to BC			
General sightseeing	51	27	21
Relaxing	30	25	16
Visiting friends / relatives	13	40	37
Shopping	22	9	13
Arts/Culture	8	1	7
City/Town Sightseeing	17	5	7
Walking	3	5	7
Dining	9	8	1
Hiking	18	16	14
Fishing	7	12	11
Camping	6	19	17
Other outdoors/activities, wilderness	13	31	25
Golfing	3	16	12
Skiing	6	5	5
Participate in other sports	4	7	12
Attending fairs/festivals	4	1	3
Other	7	3	12
Nothing in particular, not know	3	2	2

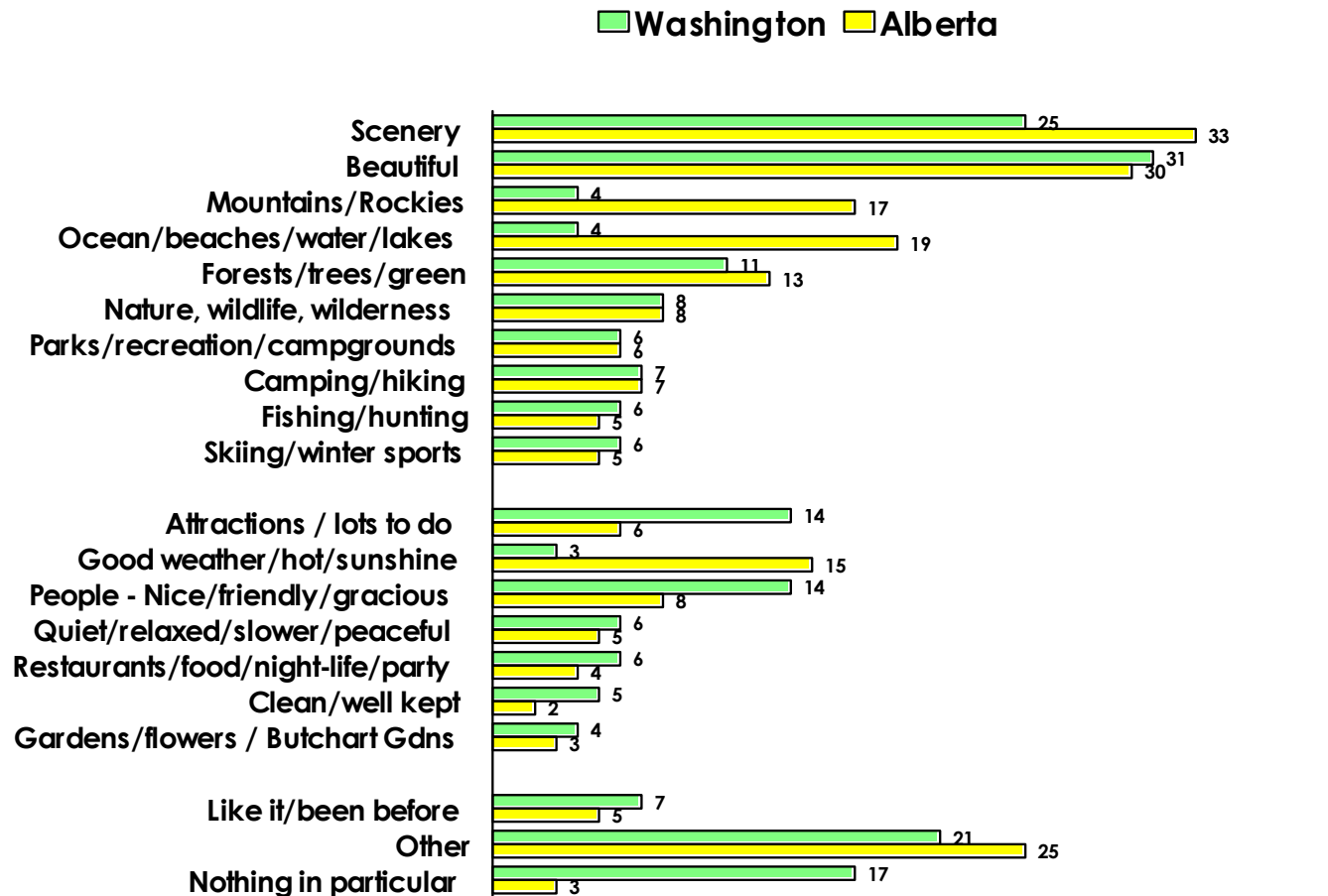
Other Destinations Consider for Trip Similar to BC Trip

Total Mentions	Washington 300 %	Alberta 302 %	BC 301 %
Alberta	7	9	13
Ontario	1	4	3
Atlantic Canada	1	2	4
Other Canada	3	4	6
Alaska	2	1	2
Pacific NW USA	17	8	10
Other USA	11	6	12
Mexico, Caribbean	2	4	5
Outside North America	-	-	8
Other	9	4	2
BC only	25	48	41
Nowhere in particular, not know	43	36	34

D. BC Destination Brand Imagery

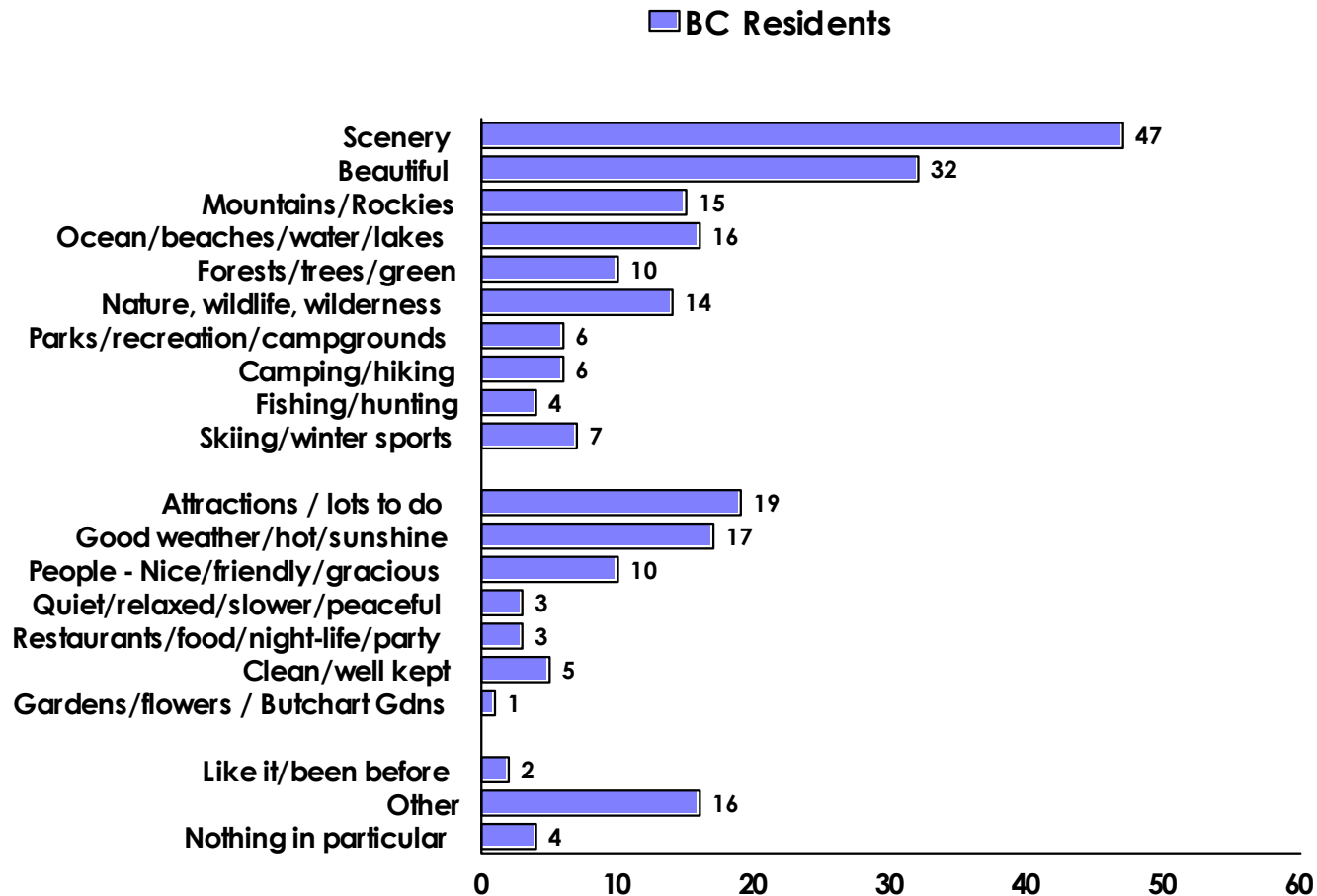
Impressions about British Columbia

Volunteered



Impressions about British Columbia

Volunteered



Impressions about British Columbia - Volunteered

What Would Find if Went for Vacation

Base	Washington 300 %	Alberta 302 %	BC 301 %
Scenery	25	33	47
Beautiful	31	30	32
Mountains/Rockies	4	17	15
Ocean/beaches/water/lakes	4	19	16
Forests/trees/green	11	13	10
Nature, wildlife, wilderness	8	8	14
Parks/recreation/campgrounds	6	6	6
Camping/hiking	7	7	6
Fishing/hunting	6	5	4
Skiing/winter sports	6	5	7
Attractions / lots to do	14	6	19
Good weather/hot/sunshine	3	15	17
People - Nice/friendly/gracious	14	8	10
Quiet/relaxed/slower/peaceful	6	5	3
Restaurants/food/night-life/party	6	4	3
Clean/well kept	5	2	5
Gardens/flowers / Butchart Gdns	4	3	1
Like it/been before	7	5	2
Other	21	25	16
Nothing in particular	17	3	4

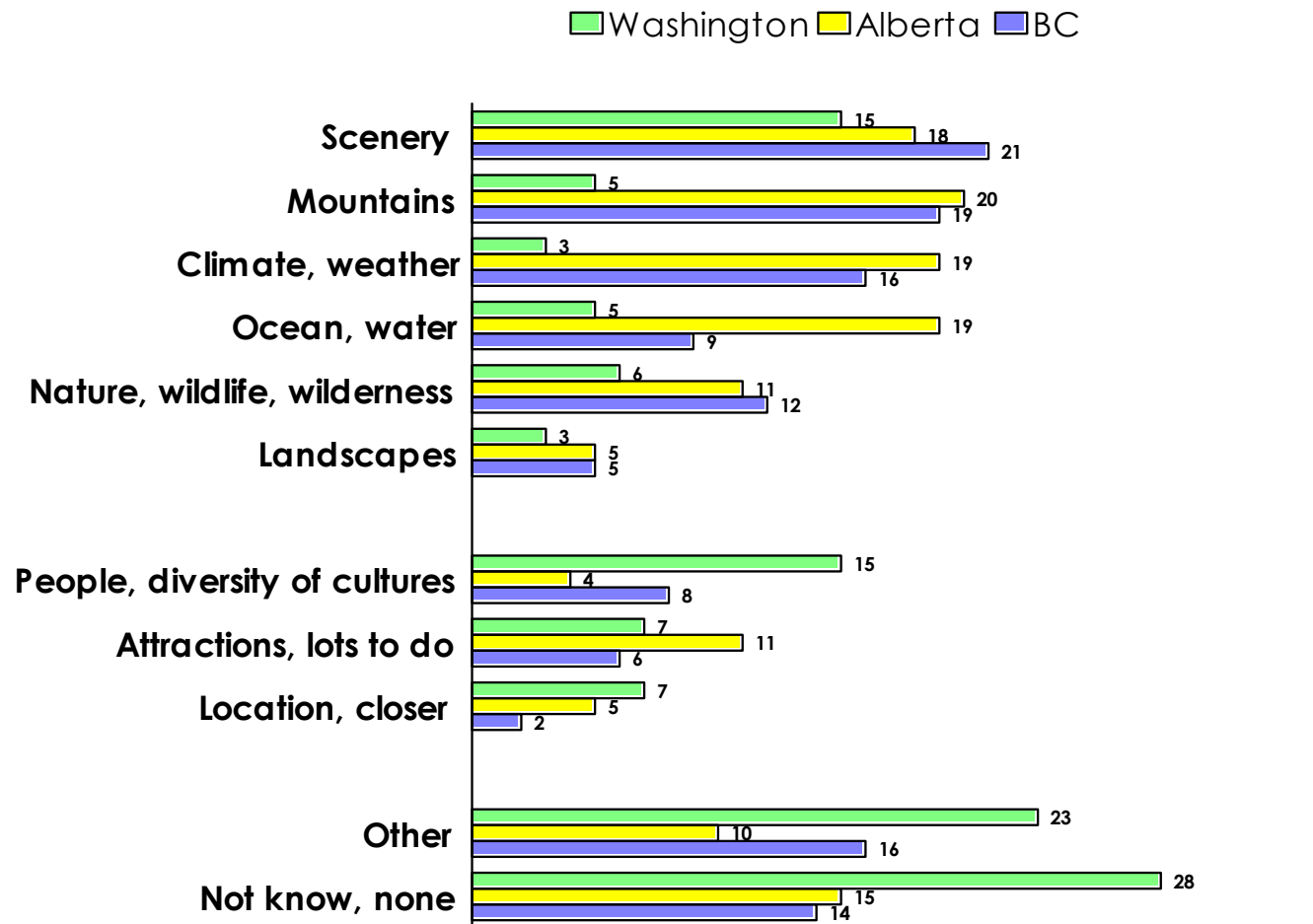
Major other: Vancouver (WA 3%); Expensive (ALTA 6%); Orchards (ALTA 5%); Rain/wet (ALTA 3 %) Easy, convenient (BC 5%)

Impressions about British Columbia - Volunteered

What Would Find if Went for Vacation

	<u>Washington</u>			<u>Alberta</u>		
	Total	Been BC 2+ in 5yr	Never Been	Total	Been BC 4+ in 5yr	Been 0/1 in 5yrs
Base	300 %	130 %	50 %	302 %	149 %	98 %
Scenery	25	29	16	33	33	31
Beautiful	31	32	23	30	35	29
Ocean/beaches/water/lakes	4	4	-	19	18	13
Mountains/Rockies	4	2	3	17	18	17
Nature, wildlife, wilderness	8	9	2	8	8	6
Forests/trees/green	11	11	5	13	15	11
Parks/recreation/campgrounds	6	11	-	6	10	4
Camping/hiking	7	6	-	7	7	8
Fishing/hunting	6	5	3	5	5	3
Skiing/winter sports	6	9	2	5	6	3
People - Nice/friendly/gracious	14	20	2	8	8	7
Attractions / lots to do	14	15	7	6	7	7
Clean/well kept	5	9	-	2	2	1
Restaurants/food/night-life/party	6	9	1	4	6	-
Gardens/flowers / Butchart Gardens	4	4	2	3	2	5
Quiet/relaxed/slower pace/peaceful	6	7	8	5	4	6
Good weather/hot/sunshine	3	3	1	15	17	11
Like it/been before	7	10	3	5	6	2
More expensive	3	3	2	6	8	4

Uniqueness of British Columbia - Volunteered



Uniqueness of British Columbia

Versus Other Destinations Considered for Similar Trip - Volunteered

Base	Washington 300 %	Alberta 302 %	BC 301 %
Scenery	15	18	21
Mountains	5	20	19
Climate, weather	3	19	16
Ocean, water	5	19	9
Nature, wildlife, wilderness	6	11	12
Landscapes	3	5	5
People, diversity of cultures	15	4	8
Attractions, lots to do	7	11	6
Location, closer	7	5	2
Other	23	10	16
Not know, none	28	15	14

Uniqueness of British Columbia

Versus Other Destinations Considered for Similar Trip - Volunteered

	Washington		
	Total	Been BC 2+ in 5 yrs	Never Been
Base	300 %	130 %	50 %
Scenery	15	18	10
Nature, wildlife, wilderness	6	6	4
Mountains	5	5	-
Ocean, water	5	4	6
Landscapes	3	3	2
Climate, weather	3	4	-
People, diversity of cultures	15	19	7
Attractions, lots to do	7	5	4
Location, closer	7	8	4
Other	23	22	29
Not know, none	28	23	39

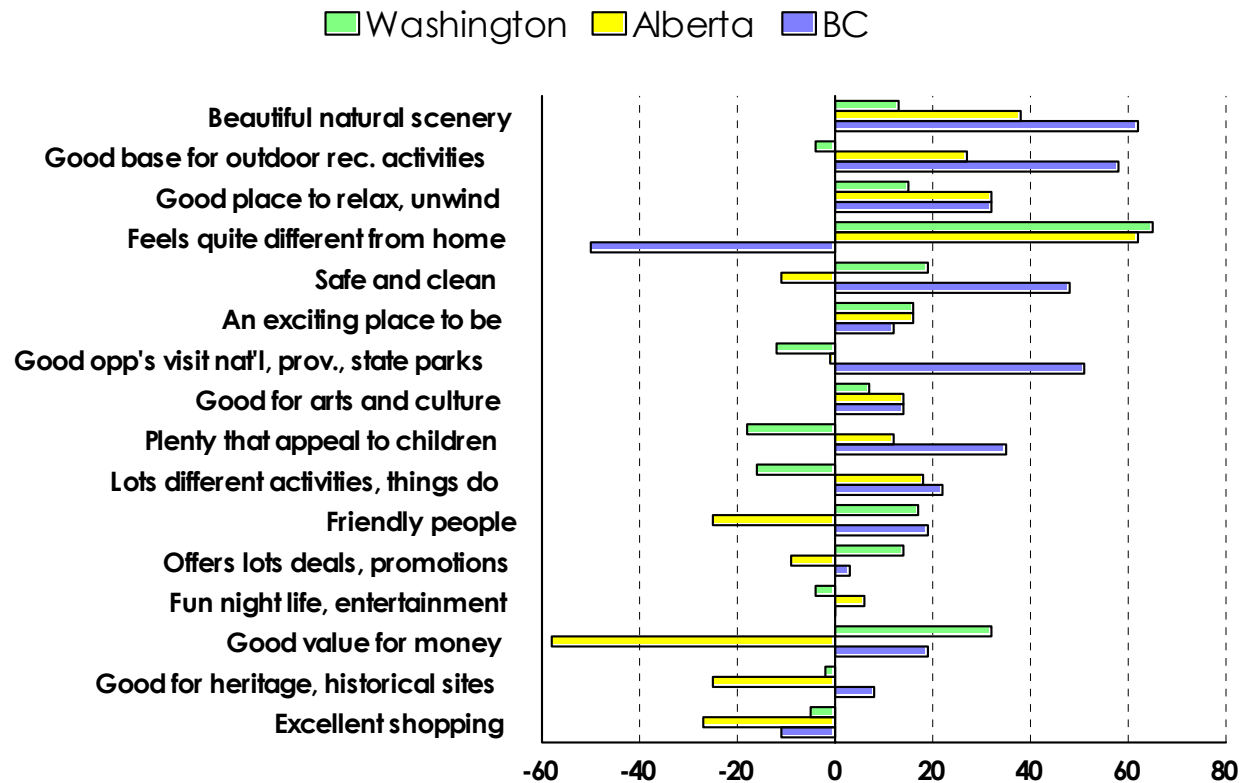
Uniqueness of British Columbia

Versus Other Destinations Considered for Similar Trip - Volunteered

	Alberta			BC		
	Total	Been BC 4+ in 5yr	Been 0/1 in 5yrs	Total	5+ BC Trips/5yr	0/1 BC in 5yr
Base	302 %	149 %	98 %	301 %	186 %	54 %
Scenery	18	23	15	21	20	29
Nature, wildlife, wilderness	11	10	10	12	15	4
Mountains	20	26	11	19	19	25
Ocean, water	19	22	15	9	11	6
Landscapes	5	5	4	5	5	4
Climate, weather	19	23	13	16	18	13
People, diversity of cultures	4	3	4	8	7	6
Attractions, lots to do	11	10	12	6	6	4
Location, closer	5	3	6	2	4	2
Other	10	10	24	20	24	12
Not know, none	15	9	41	14	12	17

BC Destination Brand Imagery Summary

Net BC Advantage by Market
 "BC Trip Better" minus "Other Destination Trip Better"



Washington: vs. Washington / Alberta: vs Alberta / BC: vs. Other Destination Considering. See table following.

BC Destination Brand Imagery Summary

Net BC Advantage

“BC Trip Better” minus “Other Destination Trip Better”

Notes for pp. 47-56

Washington: vs. Washington

Alberta: vs. Alberta

BC: vs. “Other dest’n considering for similar trip”, among those volunteering other dest’n

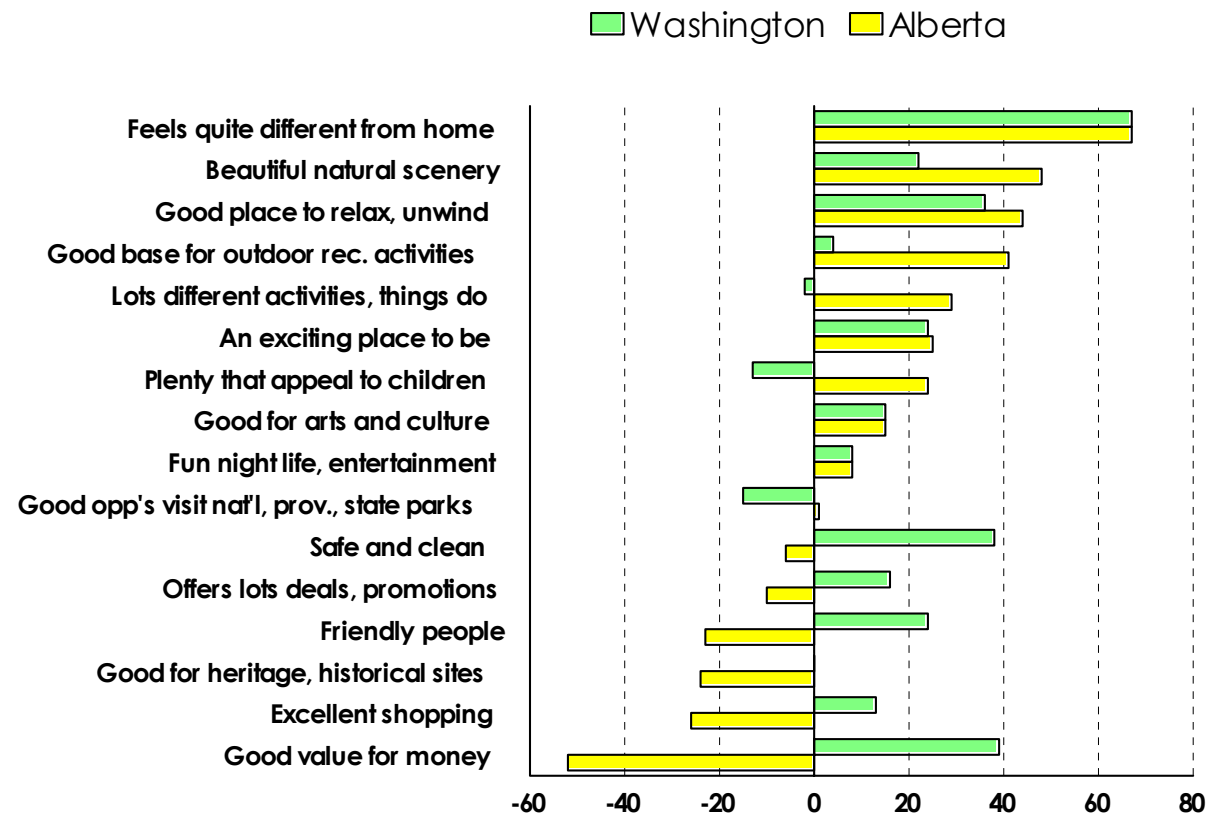
	Washington (vs. Wash’n) 300 %	Alberta (vs. Alberta) 302 %	BC (vs. other dest's) 121 %
Beautiful natural scenery	+13	+38	+62
Good base for outdoor rec. activities	-4	+27	+58
Good place to relax, unwind	+15	+32	+32
Feels quite different from home	+65	+62	-50
Safe and clean	+19	-11	+48
An exciting place to be	+16	+16	+12
Good opp's visit nat'l, prov., state parks	-12	-1	+51
Good for arts and culture	+7	+14	+14
Plenty that appeal to children	-18	+12	+35
Lots different activities, things do	-16	+18	+22
Friendly people	+17	-25	+19
Offers lots deals, promotions	+14	-9	+3
Fun night life, entertainment	-4	+6	=
Good value for money	+32	-58	+19
Good for heritage, historical sites	-2	-25	+8
Excellent shopping	-5	-27	-11

See tables following (pp. 53-56) for details

BC Destination Brand Imagery Summary

Among Frequent Visitors to BC

Net BC Advantage: "BC Better" minus "Other Dest'n Better"



See note on p. 48

BC Destination Brand Imagery Summary

Net BC Advantage: “BC Trip Better” minus “Other Destination Trip Better”

Frequent BC Visitors

Base	Washington 130 2+ in 5yrs %	Alberta 149 4+ in 5yrs %
Feels quite different from home	+67	+67
Beautiful natural scenery	+22	+48
Good place to relax, unwind	+36	+44
Good base for outdoor rec. activities	+4	+41
Lots different activities, things do	-2	+29
An exciting place to be	+24	+25
Plenty that appeal to children	-13	+24
Good for arts and culture	+15	+15
Fun night life, entertainment	+8	+8
Good opp's visit nat'l, prov., state parks	-15	+1
Safe and clean	+38	-6
Offers lots deals, promotions	+16	-10
Friendly people	+24	-23
Good for heritage, historical sites	=	-24
Excellent shopping	+13	-26
Good value for money	+39	-52

See note on p. 48

BC Destination Brand Imagery Summary

Among Non-Visitors/Infrequent Visitors to BC
Net BC Advantage: "BC Better" minus "Other Dest'n Better"



See note on p. 48

BC Destination Brand Imagery Summary – Non/Infrequent Visitors

Net BC Advantage: “BC Trip Better” minus “Other Destination Trip Better”

Not Been to BC/Infrequent Visitor

Base	Washington Never Been 50 %	Alberta 0/1 in 5yrs 98 %
Feels quite different from home	+63	+45
Beautiful natural scenery	-2	+23
Good base for outdoor rec. activities	-22	+15
Good place to relax, unwind	+2	+11
Good for arts and culture	+18	+5
Fun night life, entertainment	-17	+4
An exciting place to be	+19	+3
Lots different activities, things do	-34	+2
Good opp's visit nat'l, prov., state parks	-21	-1
Offers lots deals, promotions	+1	-5
Plenty that appeal to children	-22	-6
Safe and clean	-1	-15
Friendly people	-5	-26
Good for heritage, historical sites	-2	-26
Excellent shopping	-27	-27
Good value for money	+9	-65

See note on p. 48

BC Destination Brand Imagery

Better - BC Trip vs. Other Destination Trip

See note on p. 48

BC = Among those naming another dest'n for similar trip
Base

		Washington (vs. Wash'n) 300 %	Alberta (vs. Alberta) 302 %	BC (vs. other dest's) 121 %
Good value for money	BC	51	8	46
	Other	19	66	27
	Equal	17	19	16
	Neither, not know	12	7	11
Good base for outdoor rec. activities	BC	25	42	66
	Other	29	15	8
	Equal	39	40	21
	Neither, not know	8	3	4
Good place to Relax, unwind	BC	36	46	51
	Other	21	14	19
	Equal	37	38	26
	Neither, not know	5	3	4
Good for arts and culture	BC	32	40	40
	Other	25	26	26
	Equal	32	23	21
	Neither, not know	12	11	12

BC Destination Brand Imagery

Better - BC Trip vs. Other Destination Trip

Base		Washington (vs. Wash'n) 300 %	Alberta (vs. Alberta) 302 %	BC (vs. other dest's) 121 %
Good heritage, historical sites	BC	29	15	40
	Other	31	40	32
	Equal	29	35	20
	Neither, not know	11	10	8
Friendly people	BC	34	10	36
	Other	17	35	17
	Equal	40	51	40
	Neither, not know	8	5	7
Opportunities visit Nat'l, Prov'l State Parks	BC	22	27	59
	Other	34	28	8
	Equal	34	38	26
	Neither, not know	9	6	7
Plenty appeal to Children	BC	12	28	43
	Other	30	16	8
	Equal	29	38	23
	Neither, not know	29	18	26

BC Destination Brand Imagery

Better - BC Trip vs. Other Destination Trip

Base		Washington (vs. Wash'n) 300 %	Alberta (vs. Alberta) 302 %	BC (vs. other dest's) 121 %
Safe and clean	BC	36	16	55
	Other	17	27	7
	Equal	36	52	33
	Neither, not know	11	5	5
Beautiful Natural Scenery	BC	33	49	68
	Other	20	11	6
	Equal	44	37	24
	Neither, not know	3	3	3
Excellent Shopping	BC	26	18	29
	Other	31	45	40
	Equal	28	25	15
	Neither, not know	15	13	16
Offer Lots deals, Promo's	BC	33	17	27
	Other	19	26	24
	Equal	20	24	23
	Neither, not know	29	33	25

BC Destination Brand Imagery

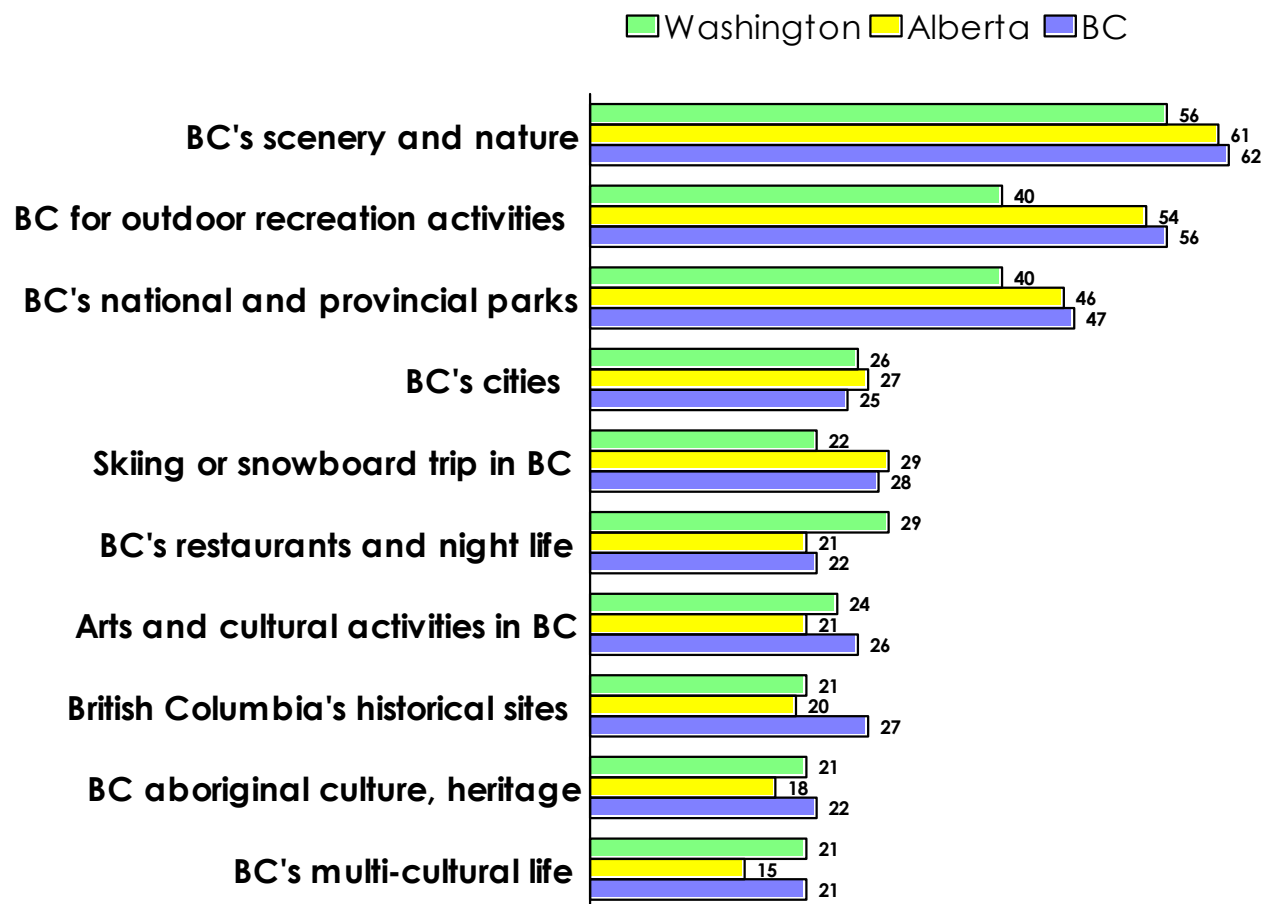
Better - BC Trip vs. Other Destination Trip

		Washington (vs. Wash'n) 300 %	Alberta (vs. Alberta) 302 %	BC (vs. other dest's) 121 %
Feels quite different from at home	BC	71	70	11
	Other	6	8	61
	Equal	11	12	17
	Neither, not know	12	10	10
Exciting place	BC	38	39	42
	Other	22	23	30
	Equal	30	34	20
	Neither, not know	11	5	8
Lots of Different Activities and Things to do	BC	19	33	44
	Other	35	15	22
	Equal	40	47	27
	Neither, not know	6	5	8
Fun night life and entertainment	BC	24	31	33
	Other	28	25	33
	Equal	23	30	21
	Neither, not know	25	14	13

E. Interest in BC Trip Ideas

Interest in BC Trip Ideas

% Very Interested in Trip to See/Experience



Interest in BC Trip Ideas

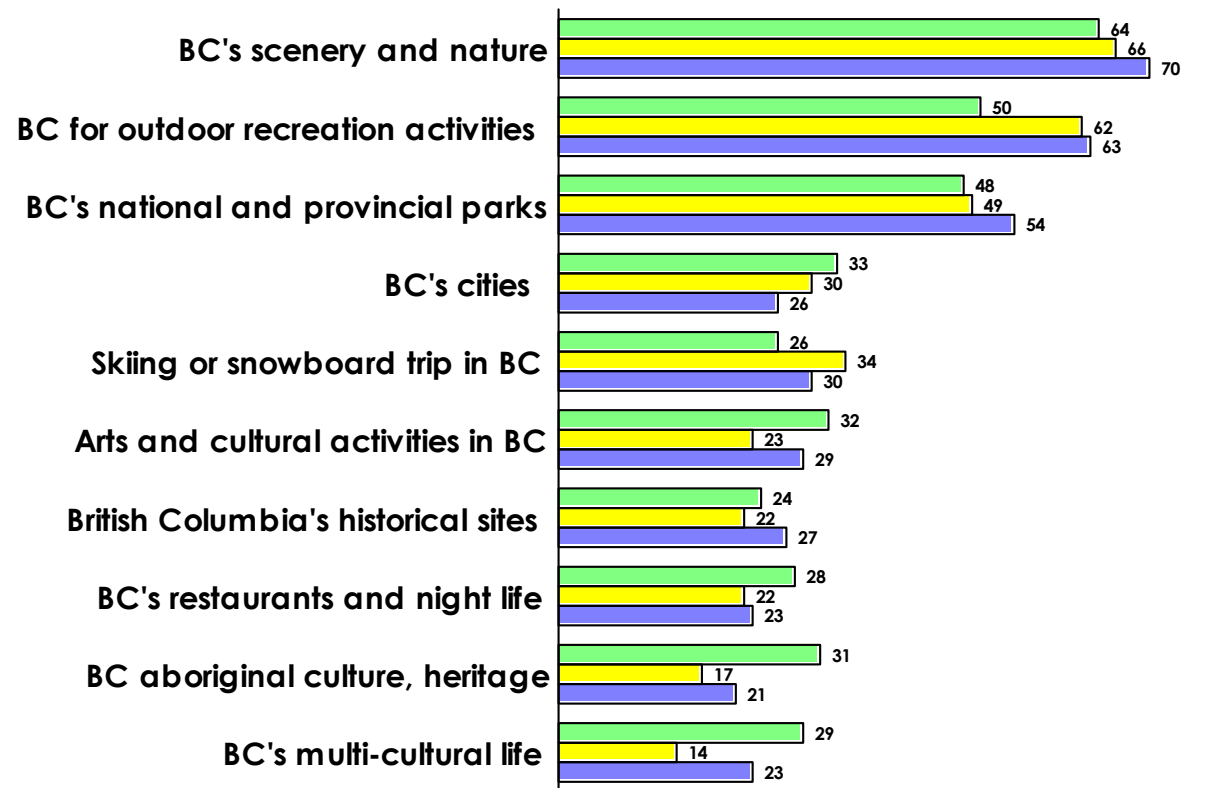
% Very Interested in Trip to See/Experience

	Washington	Alberta	BC
	300	302	301
	%	%	%
BC's scenery and nature	56	61	62
BC for outdoor recreation activities	40	54	56
BC's national and provincial parks	40	46	47
BC's cities	26	27	25
Skiing or snowboard trip in BC	22	29	28
BC's restaurants and night life	29	21	22
Arts and cultural activities in BC	24	21	26
British Columbia's historical sites	21	20	27
BC aboriginal culture, heritage	21	18	22
BC's multi-cultural life	21	15	21

Interest in BC Trip Ideas

Stronger BC Travel Prospects *

% Very Interested in Trip to See/Experience



* See table following for details

Interest in BC Trip Ideas Stronger BC Travel Prospects % Very Interested in Trip to See/Experience

Washington/Alberta base: "Thought about Visiting BC"

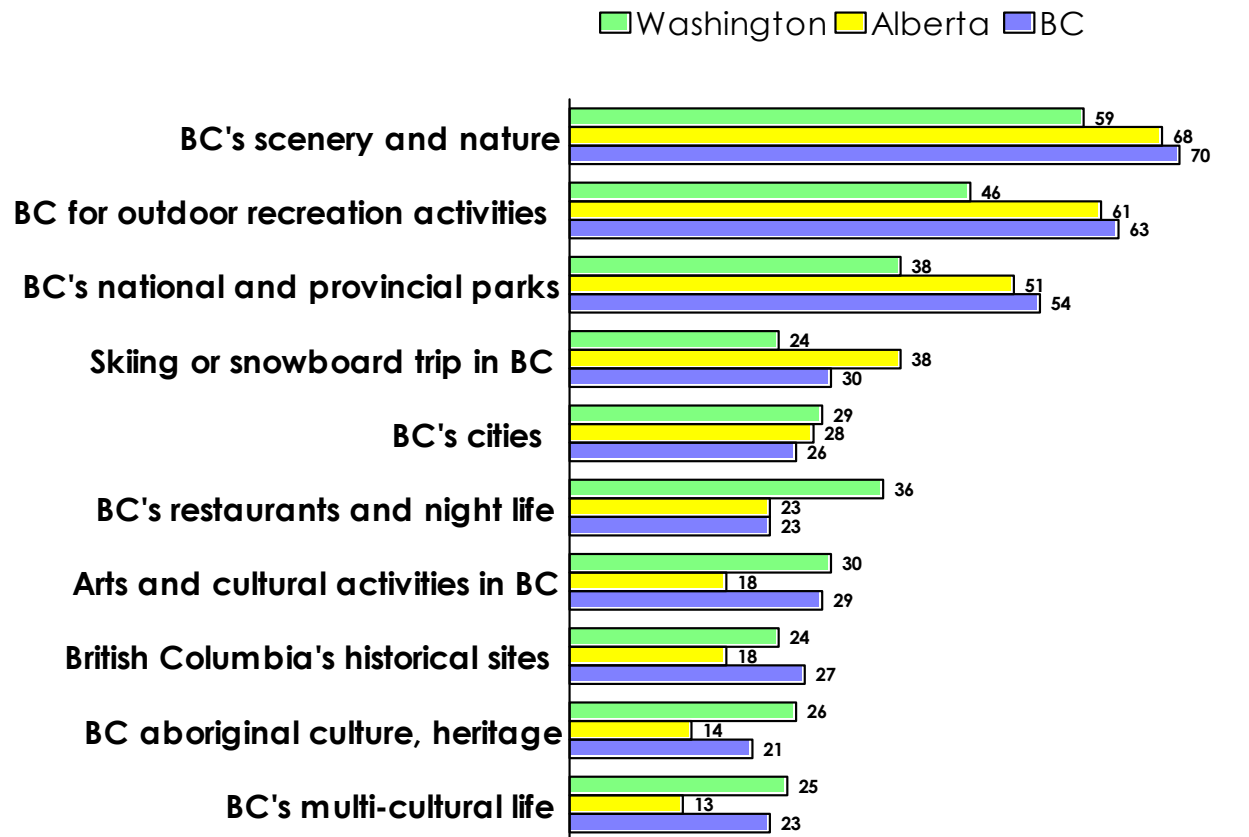
BC Base: Taken 5+ BC trips in 5 years

	Washington	Alberta	BC
Base	154 %	219 %	186 %
BC's scenery and nature	64	66	70
BC for outdoor recreation activities	50	62	63
BC's national and provincial parks	48	49	54
BC's cities	33	30	26
Skiing or snowboard trip in BC	26	34	30
Arts and cultural activities in BC	32	23	29
British Columbia's historical sites	24	22	27
BC's restaurants and night life	28	22	23
BC aboriginal culture, heritage	31	17	21
BC's multi-cultural life	29	14	23

Interest in BC Trip Ideas

Frequent BC Visitors

% Very Interested in Trip to See/Experience



Interest in BC Trip Ideas

Frequent BC Visitors

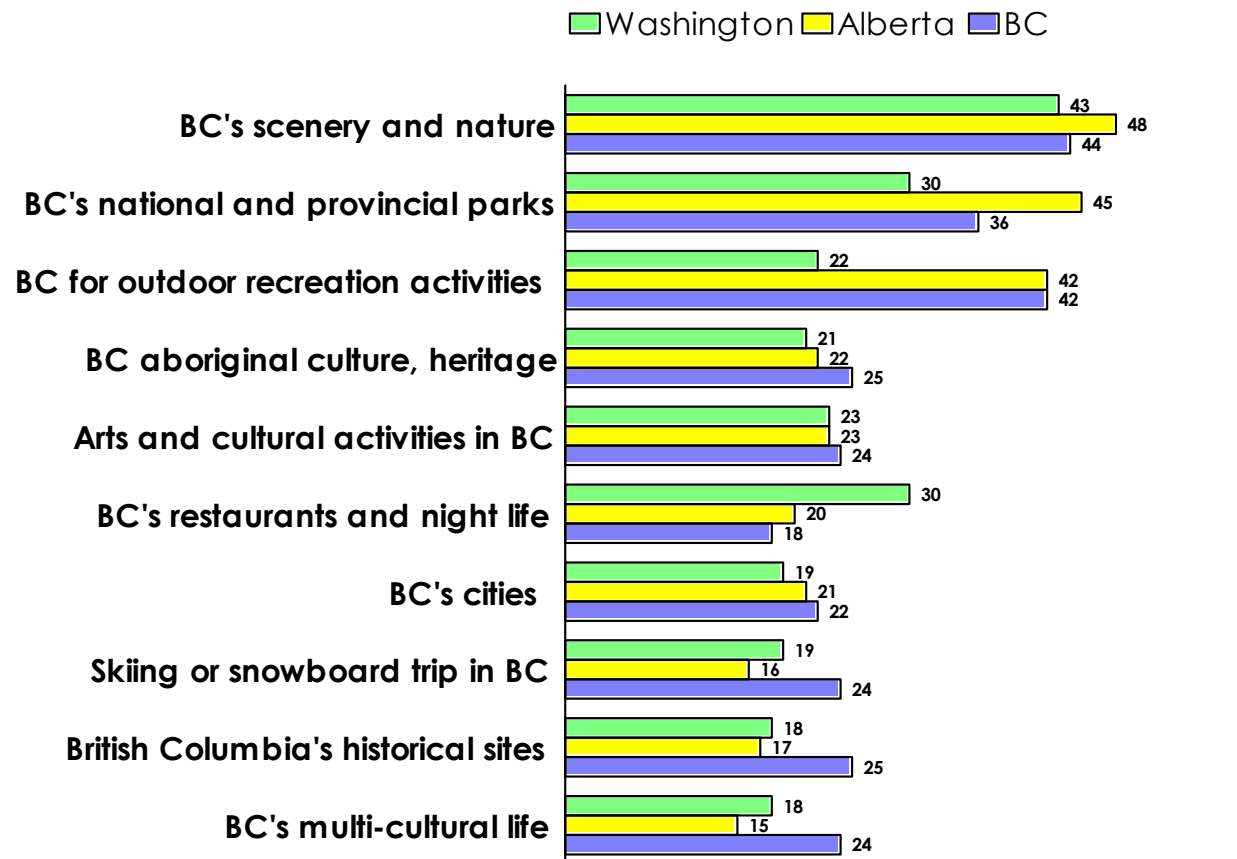
% Very Interested in Trip to See/Experience

	Washington	Alberta	BC
	2+ BC in 5 yrs	4+ BC in 5 yrs	5+ BC in 5 years
Base	130 %	149 %	186 %
BC's scenery and nature	59	68	70
BC for outdoor recreation activities	46	61	63
BC's national and provincial parks	38	51	54
Skiing or snowboard trip in BC	24	38	30
BC's cities	29	28	26
BC's restaurants and night life	36	23	23
Arts and cultural activities in BC	30	18	29
British Columbia's historical sites	24	18	27
BC aboriginal culture, heritage	26	14	21
BC's multi-cultural life	25	13	23

Interest in BC Trip Ideas

Non-/Infrequent BC Visitors

% Very Interested in Trip to See/Experience



Interest in BC Trip Ideas

Non-Visitors/Infrequent BC Visitors

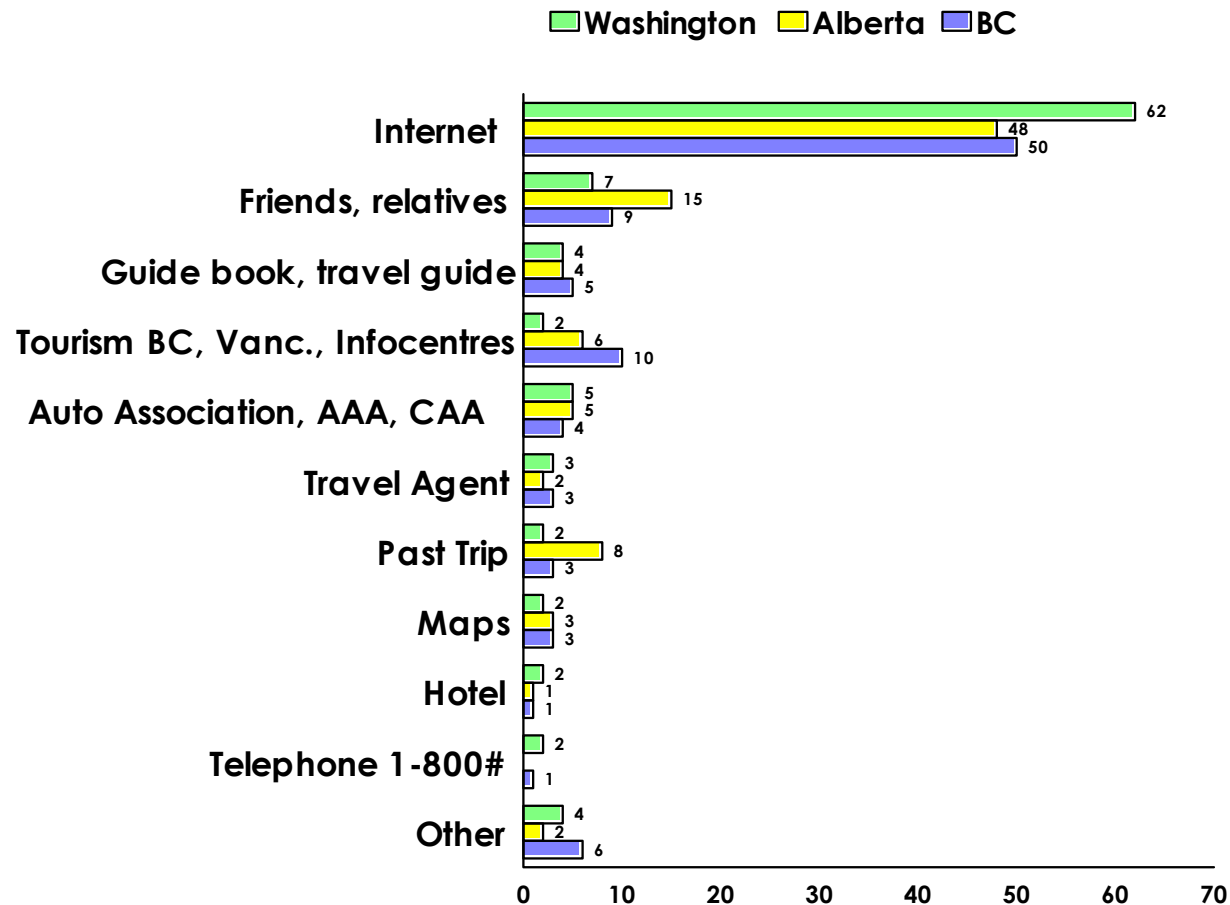
% Very Interested in Trip to See/Experience

	Washington	Alberta	BC
	Never Been	0/1 BC in 5yrs	0/1 BC in 5yrs
Base	50 %	98 %	54 %
BC's scenery and nature	43	48	44
BC's national and provincial parks	30	45	36
BC for outdoor recreation activities	22	42	42
BC aboriginal culture, heritage	21	22	25
Arts and cultural activities in BC	23	23	24
BC's restaurants and night life	30	20	18
BC's cities	19	21	22
Skiing or snowboard trip in BC	19	16	24
British Columbia's historical sites	18	17	25
BC's multi-cultural life	18	15	24

F. Sources of Information and Booking

Sources of Information for Planning BC Trip

Volunteered - First Mention



Sources of Information for Planning BC Trip

Base		Wash'n	Alberta	BC
		300	302	301
		%	%	%
First Source	Internet	62	48	50
	Friends, relatives	7	15	9
	Guide book, travel guide	4	4	5
	Tourism BC, Vanc., Infocentres	2	6	10
	Auto Association, AAA, CAA	5	5	4
	Travel Agent	3	2	3
	Past Trip	2	8	3
	Maps	2	3	3
	Hotel	2	1	1
	Telephone 1-800#	2	-	1
	Other	4	2	6
Total Volunteered	Internet	78	66	68
	Friends, relatives	29	41	31
	Guide book, travel guide	26	17	16
	Tourism BC, Vanc., Infocentres	7	14	23
	Auto Association, AAA, CAA	10	15	10
	Travel Agent	12	8	12
	Past Trip	5	11	4
	Maps	5	6	7
	Hotel	4	2	2
	Telephone 1-800#	5	2	3
	Other	9	5	15

Aided Trip Planning Vehicles Use

Base	Washington 300 %	Alberta 302 %	BC 301 %
Internet, Web-Sites	89	82	82
Special deals on accomm.	75	61	66
Travel guide books	56	56	63
Request travel guides from TBC	57	52	56
Special deals on airline flights	36	45	42
Advice from a travel agent	27	28	28