



2012 In-Market Research Report



Kootenay Rockies



TourismBC

enrg RESEARCH GROUP



Executive Summary

This report summarizes key highlights for the Kootenay Rockies (KR) region taken from the British Columbia In-Market study conducted in November 2011 and April 2012. A full report on the findings, plus summaries of the other BC tourism regions are available under separate covers.

- *Visitors to any BC region are looking for destinations which offer value for money, a place to relax and unwind and which serve as a good getaway from everyday life.*
- *Respondents from Alberta followed by 'Other BC' have the highest familiarity with the Kootenay Rockies region. Eastern Washington respondents are more familiar overall with the region than those from the Lower Mainland of BC.*
- *Key activities which motivated trips to the Kootenay Rockies were sightseeing, nature, wildlife viewing; visiting parks and visiting friends or relatives.*
- *It therefore follows that visitors to the region were likely to participate in sightseeing, nature, wildlife viewing; visiting parks, hiking and shopping on their trip.*
- *Half (49%) of respondents are likely to visit the region in the next two years, most likely for a 'mini-vacation' (3-5 nights), followed by a 'getaway' (1-2 nights). The majority of future trips to the Kootenay Rockies are planned for summer. Outdoor recreation activities and experiencing scenery and nature are key motivators for future trips.*
- *The Internet (on a computer as opposed to a mobile device) is heavily relied-upon for pre-trip planning, while information centres and online (at accommodations) are the most popular information sources during trips.*
- *Preferring to visit a different or international location and lack of interest in visiting or returning to the region were key reasons given by respondents that are unlikely to take a trip to the Kootenay Rockies in the next two years.*
- *Six-in-ten (59%) of respondents familiar with KR have a positive overall impression of the region, which ranks it 2nd out of the 6 British Columbia Tourism regions, behind Vancouver Island.*



Background & Methodology

BACKGROUND

This document highlights the results of a two-part In-Market study conducted among residents of British Columbia, Alberta, Western Washington State and Eastern Washington State in late 2011 and early 2012. These surveys were conducted to update similar studies conducted in 2008 and 2006.

The purpose of these ongoing studies is to provide the Ministry and the six tourism regions with market profiles and brand attitudes from key regional markets.

DATA COLLECTION

The surveys were distributed to respondents on-line. Survey programming, hosting and data collection was undertaken by NRG Research, utilizing Research Now's on-line panel. A quota sample was used to ensure that each region had enough responses to create reliable profiles. In total, n=3,051 surveys were conducted in 2011/2012, with n=459 evaluations conducted for the Kootenay Rockies (KR) region.

DATA ANALYSIS

The data was weighted to accurately reflect the population of travellers from each of the markets profiled, based on region, gender, age and education.

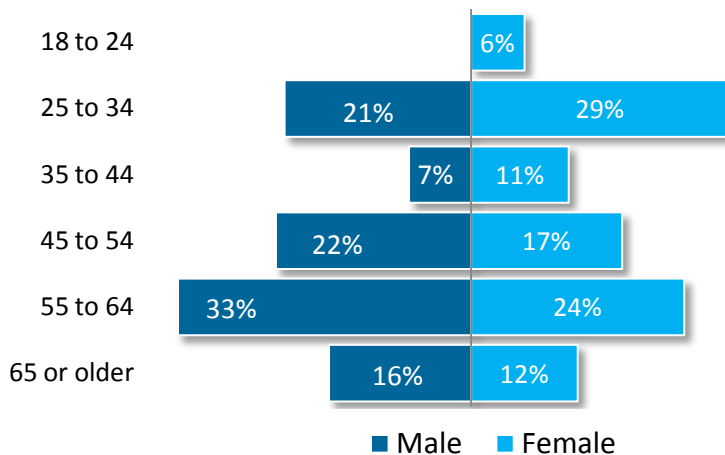


Respondent Characteristics – Kootenay Rockies

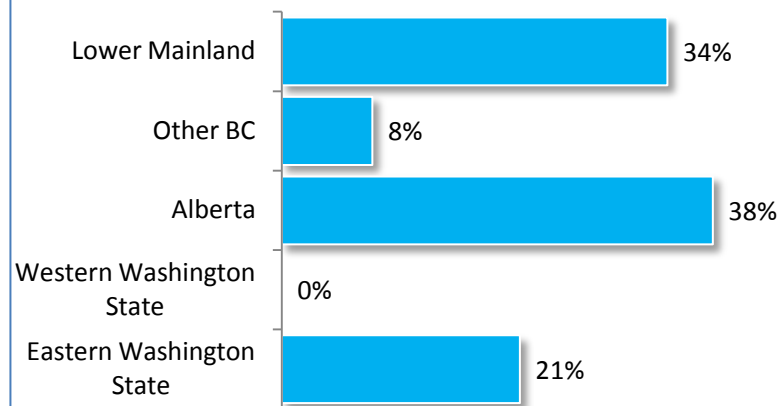
- Respondents who evaluated the Kootenay Rockies (n=459) were slightly more likely to be female (55% vs. 45% male) and skewed younger for female and older for males. The largest group were from Alberta followed by the Lower Mainland of BC. They were predominantly post-secondary educated and slightly skewed towards lower income brackets.



Gender & Age

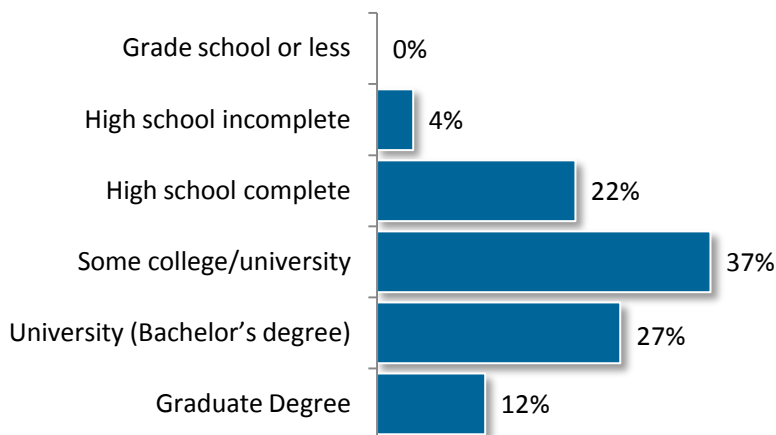


Respondent Origin

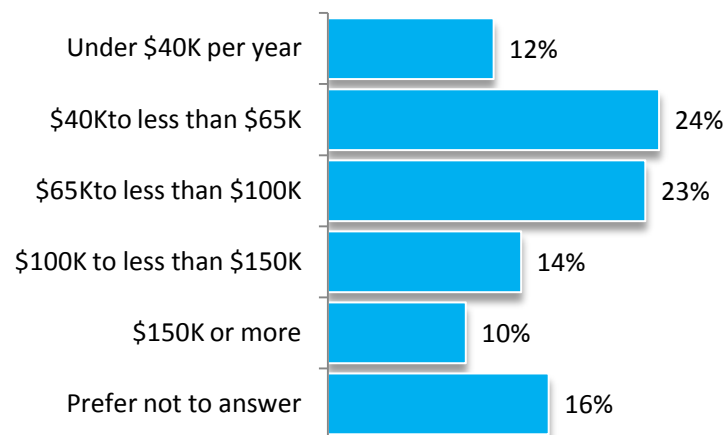


* Western Washington respondents did not evaluate KR.

Education



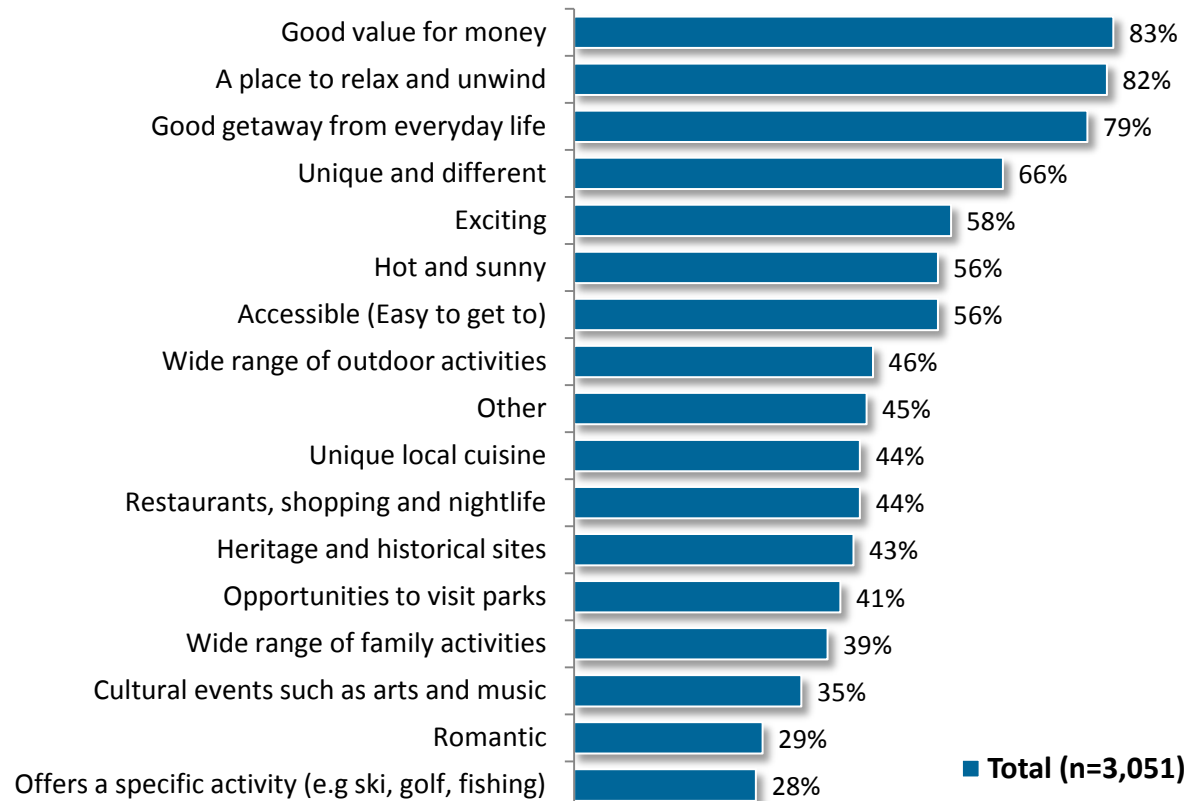
Household Income



Top Factors in choosing a BC destination

- The most important factors, (top 2 box ratings*), for choosing a BC destination are those which offer good value for money, a place to relax and unwind and serves as a good getaway from everyday life. After the top three factors, there is a significant drop in the proportion of ratings to destinations which are unique and different, exciting and hot and sunny.

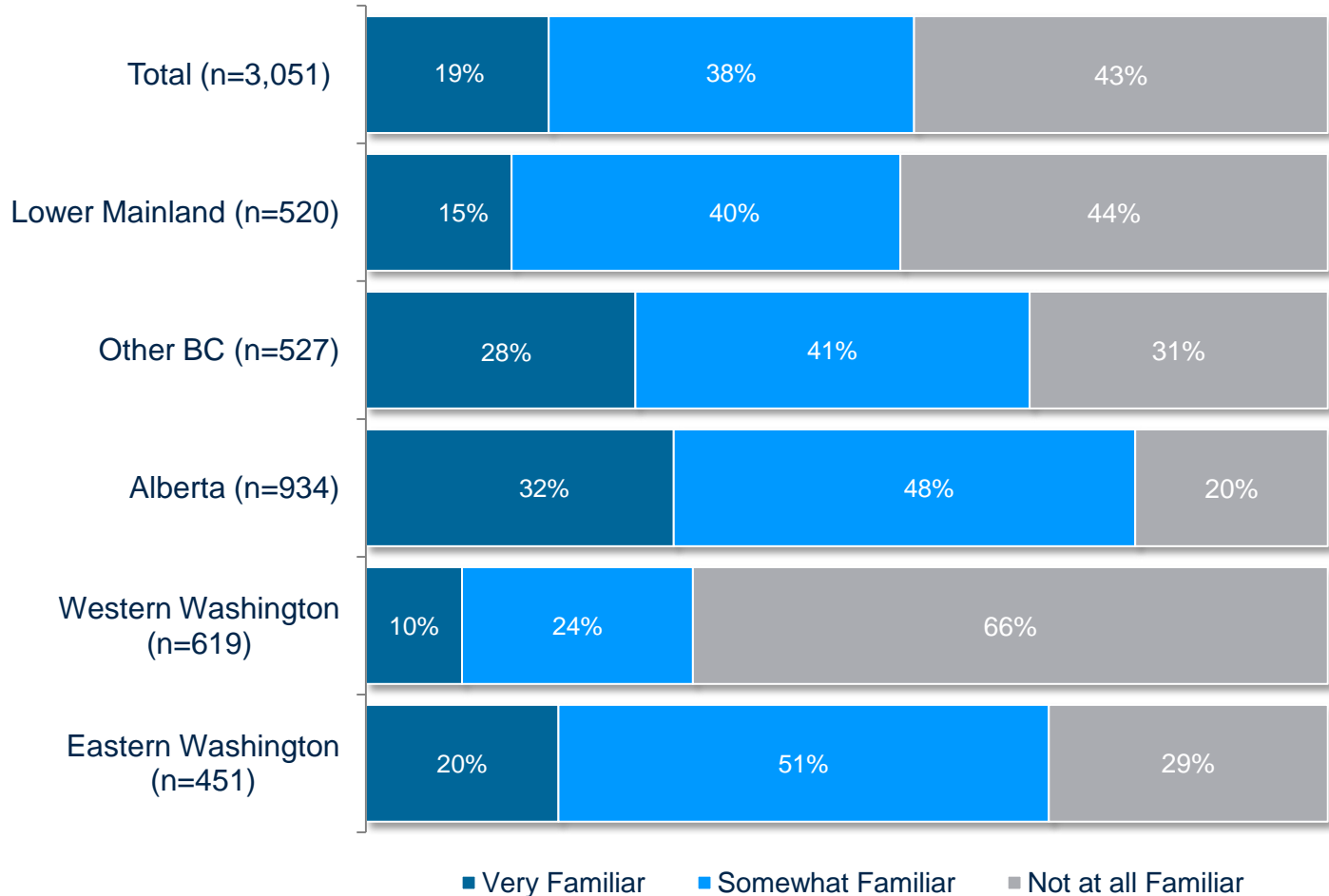
Top Factors in choosing a destination



* Top 2 box includes ratings of 4 or 5 out of 5 on a 5 point scale where 1 is 'Not at all important' and 5 is 'Very important'.

Familiarity with KR – by Origin

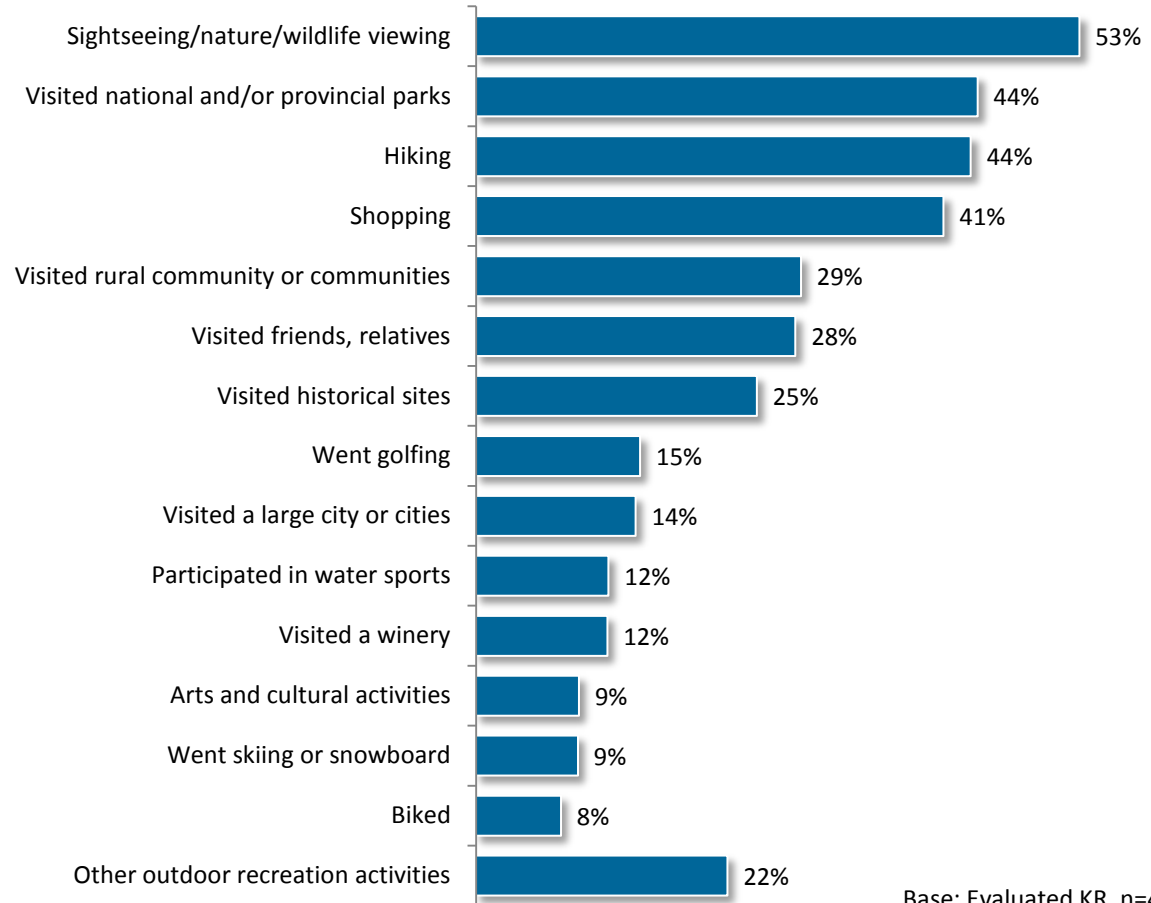
- Overall, Albertan residents are the most likely to say they are very or somewhat familiar with the Kootenay Rockies region, followed by Other BC residents. Just one-in-five Eastern Washington residents say they are very familiar, however half (51%) consider themselves to be somewhat familiar with the region. Western Washington State residents are the least familiar with the region (Western Washington residents were not invited to evaluate this region).



Activities Participated In – Kootenay Rockies

- Visitors to Kootenay Rockies destinations were most likely to have participated in sightseeing, nature, wildlife viewing, visiting national/provincial parks, hiking, shopping and visiting rural communities. Other key activities included visiting friends and relatives and visiting historical sites.

Top Activities Participated In – Kootenay Rockies

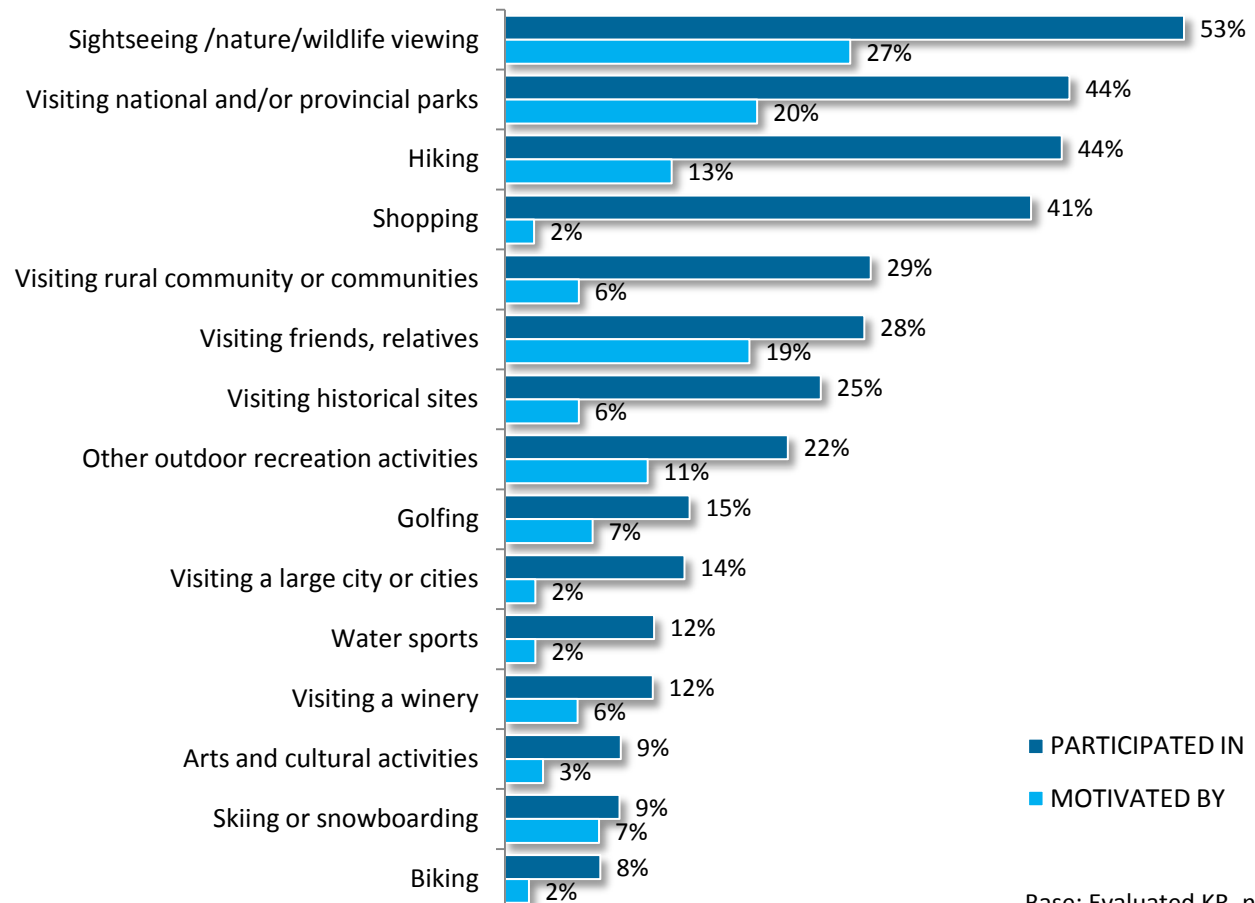


Base: Evaluated KR, n=459.

Motivating vs. Participating – Kootenay Rockies

- Visitors to destinations in the Kootenay Rockies participated in a far greater range of activities while on their trip than they were originally motivated by. Sightseeing, nature, wildlife viewing, visiting national/provincial parks, visiting friends and relatives and hiking were the most common trip motivators.
- Those activities with the largest gap in motivation vs. participation offer the largest opportunities to differentiate from competing destinations.

Motivating vs. Participating Activities



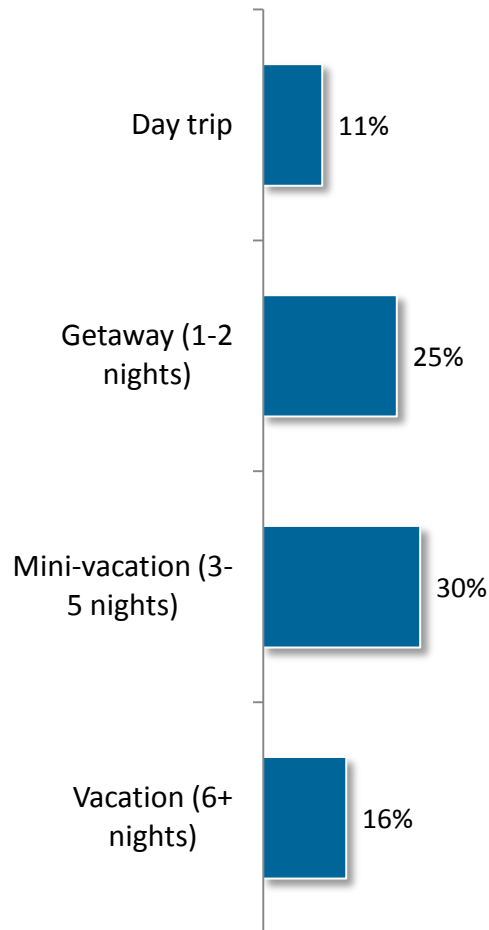
Base: Evaluated KR, n=459.



Future Trips to the Kootenay Rockies

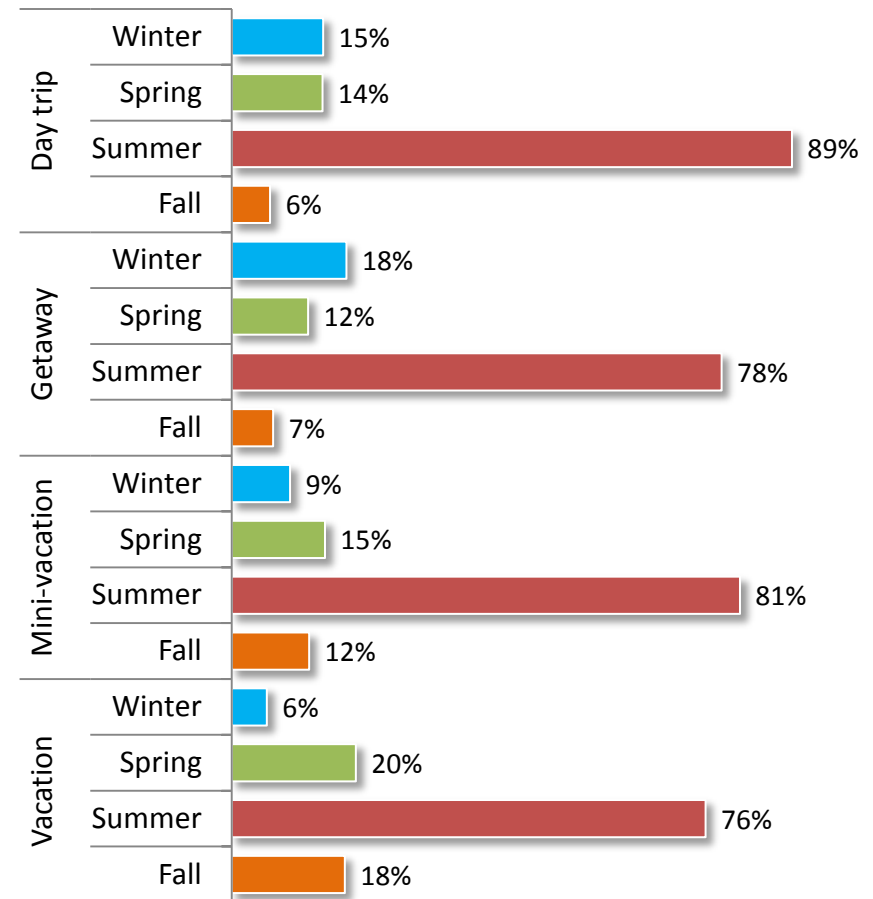
- Three-in-ten respondents who evaluated KR are likely to take a 'Mini-vacation' to that region in the next two years, while one-quarter are likely to take a 'getaway'.
- The majority of future trips to the Kootenay Rockies are planned for summer.

Likelihood to Take Different Trip Durations (% top 2 box)



Base: Evaluated KR, n=459.

Season of Trip by Trip Type



Base: Likely to take trip. Day, n=51, Getaway, n=115, Mini V, n=135, Vacation, n=72.

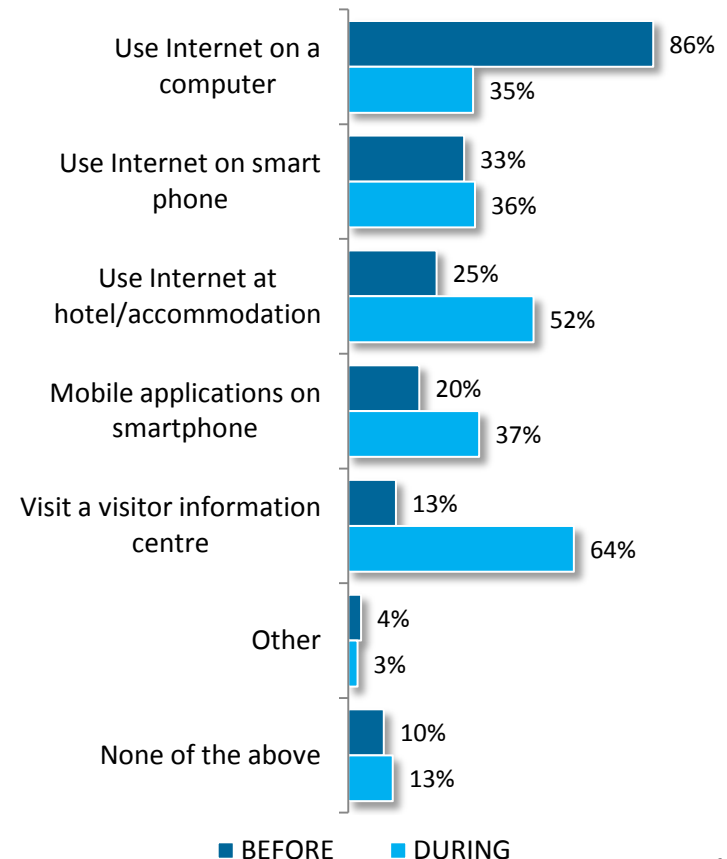
Future Trips to the Kootenay Rockies

- Outdoor recreation activities are the primary motivator for future trips to KR, as mentioned by just under half (48%) of those likely to visit in the next two years. This is followed by a trip to experience scenery and nature and to relax and unwind.
- The Internet (accessed on a computer) is the key pre-trip information source, while visitor centres, Internet at accommodations and Internet on mobile devices would be used for information during future trips.

Main Activities for future trips



Trip Planning Tools



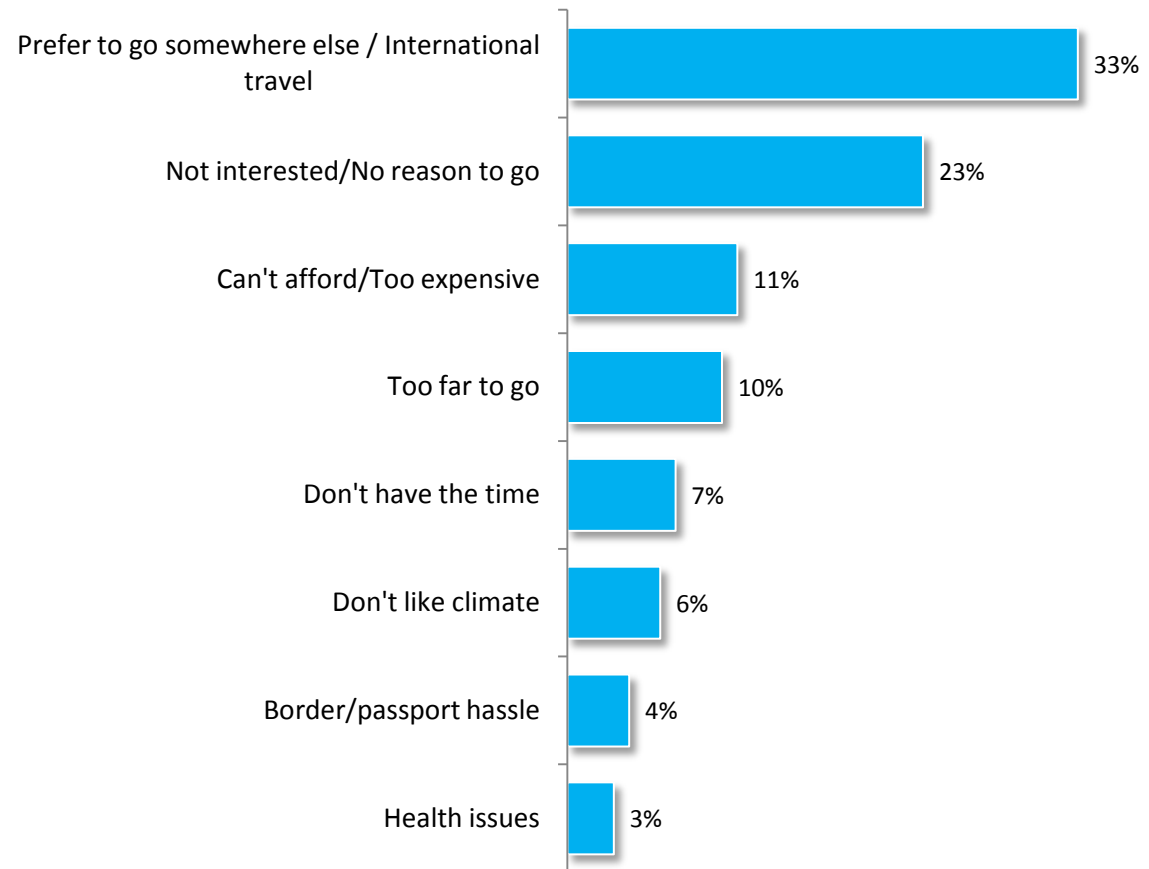
Base (Both charts): Likely to take a trip to KR, n=224.

Reasons for being unlikely to visit - KR

- Those not likely to visit the Kootenay Rockies region in the next 2 years cited preferring to go to a different/international destination (33%), not being interested/having no reason to go (23%) as their main reasons, followed by price and distance, as mentioned by one-in-ten.

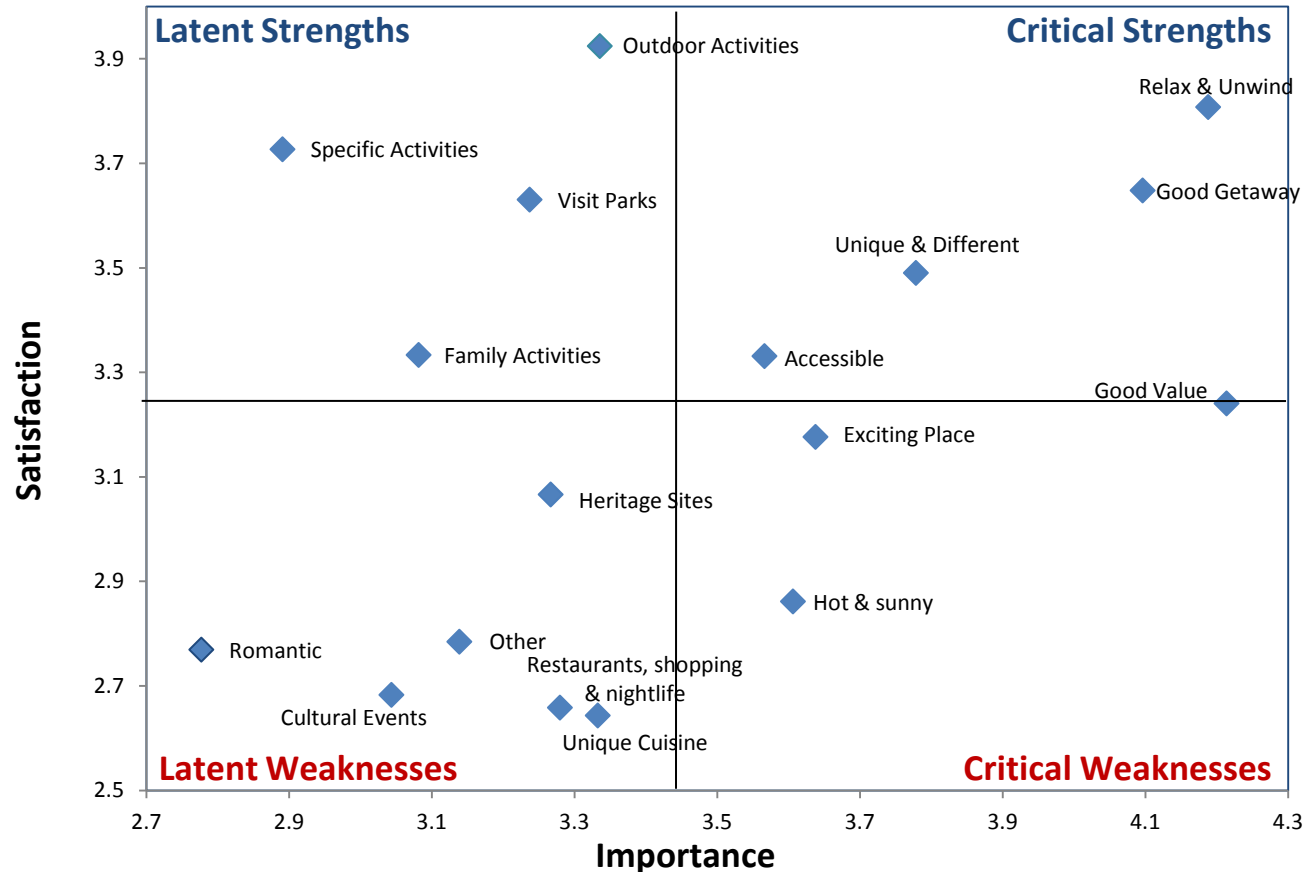


Reasons for being unlikely to visit



Factors Associated with KR – Importance/Satisfaction Matrix

- The importance/satisfaction matrix divides attributes into four quadrants based on the average importance and satisfaction scores for each attribute. The axis of the matrix shows the overall average importance and satisfaction scores (out of 5) for all attributes.
- Being a place to relax and unwind, a good getaway and being unique and different and accessible are critical strengths for KR. Good value is very important but receives an average satisfaction rating.
- Outdoor activities, specific activities, visit national/provincial parks, and family activities are latent strengths for the region.



Factors Associated with the Kootenay Rockies

- Respondents from BC (both Lower Mainland and Other BC residents) associate the Kootenay Rockies region with offering good value for money, being hot and sunny, having heritage and historical sites, and offering cultural events such as arts and music.
- For Albertan respondents, the Kootenay Rockies are considered to be accessible, hot and sunny, offer family activities and romantic.
- In contrast, Eastern Washington residents consider the Kootenay Rockies as a good getaway from everyday life, a place to relax and unwind and offering family activities.
- Specific associations are highlighted in the table below:

<p>Lower Mainland/ Other BC</p> <ul style="list-style-type: none"> • Offers good value for money • Hot and Sunny • Heritage and Historical Sites • Offers cultural events such as arts and music 	<p>Calgary/ Edmonton/ Other Alberta</p> <ul style="list-style-type: none"> • Accessible • Hot and Sunny • Offers family activities • Romantic
<p>Eastern Washington</p> <ul style="list-style-type: none"> • Serves as a good getaway from everyday life • A place to relax and unwind • Offers family activities 	

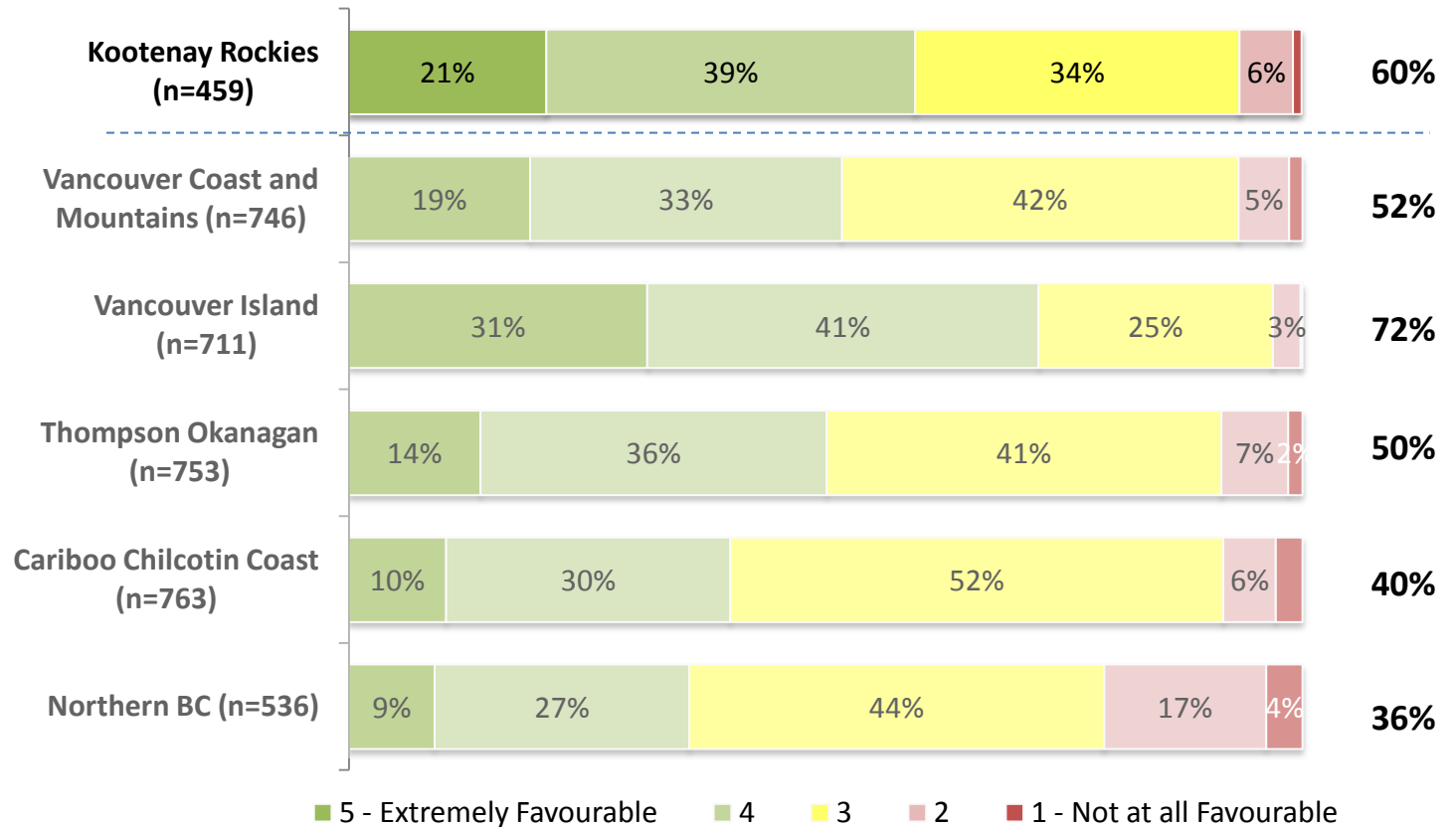




Overall Impressions

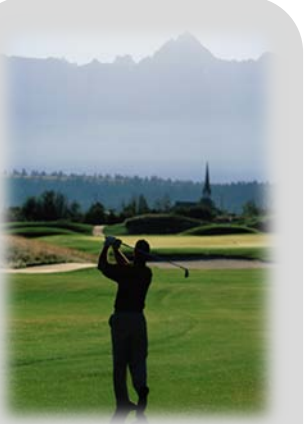
- Six-in-ten respondents which are familiar with the Kootenay Rockies have a very favourable overall impression of the region.
- The Kootenay Rockies are rated the second-highest in overall impressions, after Vancouver Island.

Overall Impressions of BC Regions as Vacation Destinations * **Top 2 Box**



* Main urban centres were omitted from the following regional evaluations:
VCM: Vancouver, Richmond & Whistler. **VI:** Victoria. **TOTA:** Kelowna & Kamloops.

Implications to Consider



- Leverage the Kootenay Rockies' position as the second highest-ranking BC tourism region in overall impressions, to draw focus to the specific activities and attractions it offers; and to the various areas within the region.
- Alberta and 'Other BC' residents offer the largest potential for tourism to the region, followed by Eastern Washington and Lower Mainland residents. The former have both higher levels of familiarity and closer proximity to the region.
- Maintain exceptional quality of service, availability of information and visibility of visitor centres. Visitors to the Kootenay Rockies tend to have a few activities planned but make most decisions about what to participate in while on their trip, which places high importance on visitor centres and other information sourced during the visit.
- The Internet and/or using applications on smart phones continue to emerge as important information sources. As such, it is important to ensure online content is up-to-date and reflective of the current season while providing easy-to-access information about activities for other seasons. The Internet is also the key resource for trip-planning information.
- Trips taken outside of the summer season offer the greatest opportunities for growth in tourism to the region, in particular during the spring and fall. Highlight the wide variety of outdoor activities available in the region that can be participated in during shoulder-seasons. This will also help address the key reasons given by those unlikely to visit the region: not being interested and preferring a different destination. Promotional material should also identify the more passive, comfort-oriented activities that are available in the region to ensure that the interests of the wider target market are not overlooked.
- Consider using promotional material that targets the different associations the various target populations have with the region. For example, residents from Alberta are more likely to associate KR with being accessible, hot and sunny and offering family activities; while residents of Eastern Washington consider it a place to relax and unwind, that serves as a good getaway from everyday life.



Appendix:





Kootenay Rockies:

Evaluations by Respondent Origin



Appendix - Regional Evaluations by Respondent Origin

- The tables on the following slides take a more in-depth review of the Kootenay Rockies region.
- Responses have been tabulated based on the origin of the respondent who evaluated the region.
- The data in these tables uses the 'WT2' weighting scheme. That is, it accurately reflects the population of travellers from each of the markets profiled, based on region, gender and age.
- Cells that have been highlighted in either blue  (higher) or pink  (lower) represent a difference compared to at least one other region.
- Bases are not weighted. In a few instances, the base size is very low. As such, these results should be interpreted with caution. These cases have been highlighted with an asterisk.



Importance of Factors in Choosing a Destination Among those who have Visited KR



Destination Attributes – Top 2 Box Importance	Origin of Respondent					Total
	Lower Mainland	Other BC	Alberta	West WA	East WA	
Offers good value for money	87.8%	85.3%	82.8%		81.1%	84.2%
A place to relax and unwind	85.3%	84.3%	88.6%		89.0%	87.3%
Serves as a good getaway from everyday life	79.5%	81.3%	84.1%		62.1%	77.3%
Unique and different, feels quite different from home	66.7%	72.0%	62.1%		42.2%	59.7%
An exciting place to be	65.0%	56.3%	62.8%		49.3%	59.9%
Hot and sunny	43.3%	58.7%	58.3%		25.8%	46.0%
Accessible (Easy to get to)	67.8%	72.7%	57.4%		46.4%	59.3%
Offers wide range of outdoor activities	36.4%	42.1%	31.2%		38.1%	35.3%
Unique local cuisine	43.1%	39.8%	42.0%		24.3%	38.1%
Restaurants, shopping and nightlife	47.2%	41.9%	43.6%		30.0%	41.5%
Heritage and historical sites	38.1%	30.9%	38.9%		25.5%	34.9%
Opportunities to visit national, provincial or state parks	42.4%	39.8%	44.9%		24.3%	38.9%
Offers wide range of activities for the entire family	37.8%	41.4%	34.9%		26.0%	34.3%
Offers cultural events such as arts and music	33.2%	44.4%	27.0%		26.1%	30.1%
Romantic	27.1%	26.9%	24.9%		20.4%	24.7%
Offers a specific activity (like ski, golf, fishing etc.)	23.6%	17.8%	31.3%		38.9%	29.6%
Other	63.0%	56.8%	27.5%		0.0%	43.6%
UNWEIGHTED BASE:	74	76	58		63	271

Activities Participated In – KR by Origin

Activities Participated In	Origin of Respondent					Total
	Lower Mainland	Other BC	Alberta	West WA	East WA	
Sightseeing/nature/wildlife viewing	53.5%	52.1%	53.1%		54.1%	53.3%
Shopping	38.2%	43.4%	41.7%		45.0%	41.3%
Hiking	48.7%	40.9%	39.6%		45.5%	43.7%
Visiting friends, relatives	43.6%	40.6%	23.4%		6.7%	28.2%
Visiting national and/or provincial parks	45.4%	37.9%	44.7%		44.3%	44.3%
Visiting rural community or communities	40.3%	29.8%	24.2%		17.9%	28.7%
Visiting historical sites	35.3%	31.1%	18.7%		17.6%	24.8%
Visiting a large city or cities	10.8%	11.4%	15.8%		17.1%	14.1%
Other outdoor recreation activities	28.1%	18.4%	19.2%		20.3%	22.2%
Fishing	8.2%	15.4%	5.2%		3.4%	6.6%
Visiting a winery	11.2%	6.6%	14.3%		7.9%	11.6%
Arts and cultural activities	16.7%	8.6%	3.8%		7.9%	9.1%
Participated in water sports	16.0%	10.8%	10.4%		7.5%	11.7%
Attended festival or event	10.3%	8.3%	6.7%		2.3%	7.2%
Visited aboriginal culture or heritage sites	7.6%	7.8%	0.0%		7.3%	4.4%
Biking	11.2%	7.7%	3.6%		9.7%	7.5%
Golf	15.8%	14.2%	16.3%		8.1%	14.5%
Whale watching	0.0%	0.0%	0.0%		1.1%	0.2%
Watching sporting events	4.0%	1.3%	1.8%		1.2%	2.4%
Skiing or snowboarding	6.3%	4.8%	14.1%		3.5%	9.0%
Participated in sporting events	6.0%	3.3%	1.9%		3.5%	3.6%
None of the above	5.0%	7.6%	0.0%		0.0%	2.2%
UNWEIGHTED BASE:	123	133	122		97	475



Activities Which Motivated Trips – KR by Origin

Motivating Activities	Origin of Respondent					Total
	Lower Mainland	Other BC	Alberta	West WA	East WA	
Sightseeing/nature/wildlife viewing	25.8%	25.0%	27.0%		30.3%	27.1%
Shopping	1.4%	5.9%	0.6%		6.2%	2.3%
Hiking	7.6%	6.5%	13.4%		24.7%	13.1%
Visiting friends, relatives	25.6%	32.4%	17.4%		6.7%	19.2%
Visiting national and/or provincial parks	11.2%	13.6%	22.9%		30.6%	19.8%
Visiting rural community or communities	5.5%	3.9%	6.6%		5.2%	5.8%
Visiting historical sites	4.1%	7.6%	7.6%		4.1%	5.8%
Visiting a large city or cities	0.0%	1.5%	3.4%		4.7%	2.4%
Other outdoor recreation activities	9.4%	8.0%	14.3%		8.6%	11.2%
Fishing	2.8%	6.0%	2.2%		2.2%	2.7%
Visiting a winery	2.9%	4.7%	10.4%		0.5%	5.7%
Arts and cultural activities	8.2%	1.4%	0.5%		0.5%	3.0%
Participated in water sports	2.2%	2.0%	1.6%		4.8%	2.4%
Attended festival or event	0.8%	2.7%	1.8%		0.5%	1.3%
Visited aboriginal culture or heritage sites	1.0%	2.1%	0.0%		1.2%	0.7%
Biking	1.4%	1.4%	1.4%		4.1%	1.9%
Golf	4.4%	6.5%	9.9%		4.6%	6.9%
Whale watching	0.0%	0.0%	0.0%		0.5%	0.1%
Watching sporting events	1.3%	0.7%	0.0%		1.2%	0.7%
Skiing or snowboarding	4.9%	2.8%	12.5%		1.7%	7.4%
Participated in sporting events	2.8%	1.2%	0.0%		0.0%	1.0%
None of the above	18.6%	21.7%	0.0%		0.0%	7.6%
UNWEIGHTED BASE:	123	133	122		97	475

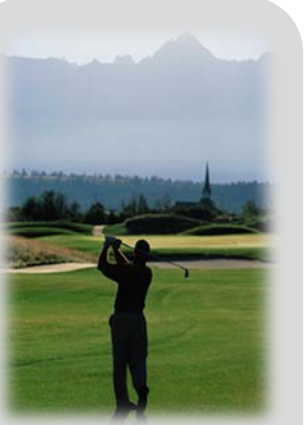


Participation vs. Motivation – KR by Origin



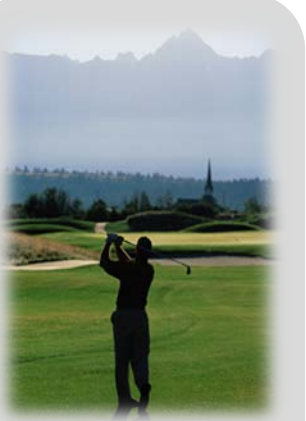
Participation Versus Motivation	Origin of Respondent										Total	
	Lower Mainland		Other BC		Alberta		West WA		East WA			
	P	M	P	M	P	M	P	M	P	M	P	M
Sightseeing/nature/wildlife viewing	54%	26%	52%	25%	53%	27%			54%	30%	53%	27%
Shopping	38%	1%	43%	6%	42%	1%			45%	6%	41%	2%
Hiking	49%	8%	41%	7%	40%	13%			46%	25%	44%	13%
Visiting friends, relatives	44%	26%	41%	32%	23%	17%			7%	7%	28%	19%
Visiting national and/or provincial parks	45%	11%	38%	14%	45%	23%			44%	31%	44%	20%
Visiting rural community or communities	40%	6%	30%	4%	24%	7%			18%	5%	29%	6%
Visiting historical sites	35%	4%	31%	8%	19%	8%			18%	4%	25%	6%
Visiting a large city or cities	11%	0%	11%	2%	16%	3%			17%	5%	14%	2%
Other outdoor recreation activities	28%	9%	18%	8%	19%	14%			20%	9%	22%	11%
Fishing	8%	3%	15%	6%	5%	2%			3%	2%	7%	3%
Visiting a winery	11%	3%	7%	5%	14%	10%			8%	1%	12%	6%
Arts and cultural activities	17%	8%	9%	1%	4%	1%			8%	1%	9%	3%
Participated in water sports	16%	2%	11%	2%	10%	2%			8%	5%	12%	2%
Attended festival or event	10%	1%	8%	3%	7%	2%			2%	1%	7%	1%
Visited aboriginal culture or heritage sites	8%	1%	8%	2%	0%	0%			7%	1%	4%	1%
Biking	11%	1%	8%	1%	4%	1%			10%	4%	8%	2%
Golf	16%	4%	14%	7%	16%	10%			8%	5%	15%	7%
Whale watching	0%	0%	0%	0%	0%	0%			1%	1%	0%	0%
Watching sporting events	4%	1%	1%	1%	2%	0%			1%	1%	2%	1%
Skiing or snowboarding	6%	5%	5%	3%	14%	13%			4%	2%	9%	7%
Participated in sporting events	6%	3%	3%	1%	2%	0%			4%	0%	4%	1%
None of the above	5%	19%	8%	22%	0%	0%			0%	0%	2%	8%
UNWEIGHTED BASE:	123		133		122				97		475	

Likelihood of taking a trip – KR by Origin



Likelihood to take type of trip (% Probably/Definitely)	Origin of Respondent					Total
	Lower Mainland	Other BC	Alberta	West WA	East WA	
Day trip	9.8%	14.7%	12.9%		8.8%	11.1%
Getaway (1-2 nights)	14.1%	28.2%	33.4%		26.6%	25.1%
Mini-vacation (3-5 nights)	22.9%	28.3%	35.5%		29.6%	29.5%
Vacation (6+ nights)	17.5%	12.7%	16.6%		11.8%	15.6%
UNWEIGHTED BASE:	171	180	151		151	653

Activities Motivating Future Trips – KR by Origin



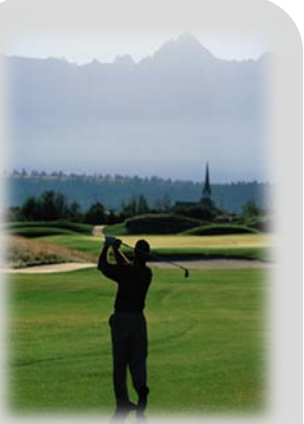
Main activities on future trips	Origin of Respondent					Total
	Lower Mainland	Other BC	Alberta	West WA	East WA	
A trip for outdoor recreation activities.	42.1%	52.9%	48.2%		54.2%	48.0%
A trip to experience scenery and nature	45.0%	24.0%	23.4%		28.8%	30.6%
A trip to relax/unwind/rest	14.9%	18.5%	23.5%		19.9%	20.0%
A trip to visit family/friends	13.0%	23.4%	8.8%		0.9%	9.5%
A trip to visit national and/or provincial parks	2.4%	1.0%	4.6%		14.3%	5.5%
A trip to experience restaurants and night life	0.0%	0.0%	0.0%		2.4%	0.5%
A skiing or snowboarding trip	8.5%	9.3%	15.9%		6.2%	11.5%
A trip to visit historical sites	1.2%	2.0%	1.9%		1.5%	1.6%
A trip to visit cities	6.5%	1.9%	1.2%		1.3%	2.8%
A trip to see arts and cultural activities	0.0%	1.9%	0.0%		0.0%	0.1%
A romantic getaway	0.0%	1.0%	0.0%		9.4%	1.9%
A trip to experience aboriginal culture and heritage	2.6%	0.0%	0.0%		0.0%	0.7%
A trip to experience multi-cultural life	0.0%	0.0%	0.0%		0.0%	0.0%
Other	0.0%	0.0%	0.0%		0.9%	0.2%
None	1.2%	1.0%	4.8%		0.9%	2.7%
UNWEIGHTED BASE:	69	86	86		70	311

Reasons for Being Unlikely to Visit – KR by Origin



Reasons for being unlikely to visit	Origin of Respondent					Total
	Lower Mainland	Other BC	Alberta	West WA	East WA	
Not interested/No reason to go	23.9%	19.4%	26.0%		17.2%	22.7%
Prefer to go somewhere else / International travel	26.5%	25.9%	39.8%		39.6%	33.4%
Can't afford/Too expensive	8.1%	15.7%	6.7%		22.4%	11.4%
Too far to go	17.9%	7.6%	5.0%		3.8%	10.0%
Don't like climate	1.7%	0.0%	0.0%		22.6%	5.7%
Don't have the time	6.9%	9.0%	9.1%		4.7%	7.3%
Too familiar	3.0%	1.6%	3.1%		0.5%	2.4%
Border/passport hassle	0.0%	0.0%	4.8%		10.0%	3.7%
Haven't thought about it	0.0%	0.0%	0.0%		0.0%	0.0%
Hard to get to	1.7%	0.8%	0.0%		2.7%	1.3%
Health issues	0.7%	2.6%	6.2%		0.5%	2.5%
Already live there	0.0%	5.0%	0.0%		0.0%	0.4%
Other	3.9%	6.7%	2.8%		0.0%	2.9%
Don't know	9.7%	10.6%	5.4%		3.6%	7.1%
UNWEIGHTED BASE:	102	94	65		81	342

Timing of Trip Planning – KR by Origin



	Timing of trip planning – tools used	Origin of Respondent					Total
		Lower Mainland	Other BC	Alberta	West WA	East WA	
Before	Use Internet on a computer	70.6%	86.5%	94.3%		90.8%	86.4%
	Use Internet on smart phone	23.9%	29.8%	40.6%		28.5%	32.8%
	Use Internet at hotel/accommodation	29.8%	18.1%	20.2%		31.9%	25.0%
	Mobile applications on smartphone	11.9%	22.2%	26.4%		16.5%	20.1%
	Visit a visitor information centre	18.6%	22.3%	6.3%		19.6%	13.5%
	Other	7.1%	3.1%	1.7%		3.2%	3.6%
	None of the above	26.2%	9.6%	2.8%		3.5%	10.1%
During	Visit a visitor information centre	49.9%	58.4%	68.4%		76.1%	63.9%
	Use Internet at hotel/accommodation	45.4%	40.2%	56.2%		58.7%	52.5%
	Mobile applications on smartphone	29.4%	33.2%	43.6%		34.5%	37.1%
	Use Internet on smart phone	28.1%	27.5%	42.8%		33.9%	35.8%
	Use Internet on a computer	35.0%	20.0%	34.3%		44.3%	35.4%
	Other	3.6%	2.0%	1.3%		4.1%	2.6%
	None of the above	27.2%	16.3%	6.5%		3.9%	12.6%
	UNWEIGHTED BASE:	69	86	86		70	311