



TourismBC

RESEARCH, PLANNING & EVALUATION

BARKERVILLE HISTORIC TOWN VISITOR STUDY 2009 RESULTS

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The 2009 Barkerville Historic Site Visitor Study was a comprehensive survey of travellers to Barkerville and Quesnel between June and September 2009.

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Executive Summary

Thousands of tourists and local residents attend cultural and arts festivals, fairs and attractions across Canada every year. They leave these sites with new experiences, new knowledge and with valuable impressions that can help organizers make more informed design, planning and marketing decisions. If they are tourists, these visitors inject money into the local community, adding to its economic well-being. A consortium of national, provincial and territorial organizations¹ produced a series of publications known as *The Guidelines for Survey Procedures* designed to generate credible and consistent inputs for estimating the tourism economic impact of festivals, events and attractions. *The Guidelines* can also be easily adapted for a variety of visitor studies depending on the information needs and research objectives of individual festivals, events and attractions. Specifically, the *Guidelines: Survey Procedures for Tourism Economic Impact Assessments at Permanent, Gated Attractions* was used in this study.

Due to increasing funding needs as well as product development and marketing needs of heritage attractions in communities around the province, Tourism British Columbia (Research, Planning & Evaluation), a part of the Ministry of Tourism, Culture and the Arts, in partnership with Barkerville Historic Town identified the need to explore the impact and benefit of Barkerville Historic Town and to better understand the positioning of the site as a unique British Columbia attraction. Specifically, the study objectives were:

1. To profile travellers to Barkerville Historic Town and the Quesnel area in terms of traveller and trip characteristics in order to support market and product development;
2. To collect and provide expenditure data to the Ministry of Tourism, Culture and the Arts for their estimation of the economic analysis of Barkerville Historic Town.

A two-location, two-stage survey design was used to achieve the study objectives. Travellers were interviewed at two locations: Barkerville Historic Town and a Reference Site (Quesnel Visitor Centre). The purpose of collecting information from the Reference Site was to obtain information about the typical traveller to the Quesnel area for comparison with travellers who visited Barkerville Historic Town. On-site interviews collected information from travellers during their trip and a follow-up questionnaire collected information from travellers after their trip. The purpose of the follow-up questionnaire was to gather information about trip motivation, planning, experiences and activities, and to understand travellers' perceptions of the Quesnel area and British Columbia upon trip completion.

¹ Sponsors of the original and/or subsequent Guideline projects: Alberta Tourism, Parks, Recreation and Culture; British Columbia Ministry of Tourism, Culture and the Arts; Canadian Tourism Commission; Federal-Provincial-Territorial Culture/Heritage and Tourism Initiative; Government of the Northwest Territories - Department of Resources, Wildlife, & Economic Development; Government of Yukon - Department of Tourism and Culture; Nova Scotia Department of Tourism, Culture and Heritage; Ontario Ministry of Tourism; Tourism British Columbia; Tourism Prince Edward Island.

- Between June 2 and September 26, 2009, a total of 2,616 people were approached either at Barkerville Historic Town or the Quesnel Visitor Centre Reference Site. Of those, 2,026 agreed to complete the interview. However, 35 of these individuals had previously completed the survey and were not invited to participate a second time; an additional seven were excluded as they did not meet the definition of a tourist. Among those intercepted at the Reference Site, 161 were excluded as they were from the local area, and an additional seven were excluded who were part of an organized tour group resulting in 1,777 useable surveys.
- Seventy-six percent of travellers intercepted at one of the two survey locations agreed to complete a follow-up survey (mailback or online) and 61% of these completed the surveys by February 22 2010, resulting in 668 useable surveys for analysis.
- Overall, almost three-quarter (74%) of Barkerville visitors were from British Columbia (including those from the local area), and almost an eighth of all visitors intercepted at Barkerville were from the Quesnel area (13%). Over two-thirds (70%) of independent, non-resident travellers to Barkerville were from British Columbia. Similarly, almost two-thirds (58%) of visitors interviewed at the Reference Site were from British Columbia.
- With respect to age, practical differences were found between independent travellers¹ at Barkerville and the Reference Site among those 65 years of age or older. Independent travellers at Barkerville were less likely to be 65 years of age or older compared to independent travellers at the Reference Site (16% Barkerville; 27% Reference Site).
- With respect to education, there were no practical differences between the two groups of respondents. However, the largest observed differences were found amongst those whose highest education attainment was high school (25% Barkerville; 18% Reference Site) or a Masters/PhD degree (8% Barkerville; 14% Reference Site).
- There were noticeable differences in travel party size between independent visitors to Barkerville and the Reference Site (3.2 Barkerville; 2.4 Reference Site). Travel parties with children were more prevalent amongst independent visitors to Barkerville compared to those interviewed at the Reference Site (36%Barkerville; 21%Reference Site).
- The largest proportion of all travellers at both Barkerville and the Reference Site indicated that the primary purpose of their trip was for leisure. This number was noticeably higher among independent travellers to Barkerville compared to the Reference Site (77%Barkerville; 65%Reference Site).

¹ For comparative purposes, travellers interviewed at Barkerville who were residents of the Quesnel area or who were part of a tour group were not included in the group identified as Barkerville Independent Travellers. Unless otherwise noted, comparative figures provided in the brackets were made between Barkerville Independent Travellers and those interviewed at the Quesnel Visitor Centre Reference Site.

- Overall, two thirds of all travellers used cars, trucks, or motorcycles as their primary mode of transportation (68% Barkerville; 67% Reference Site). Almost a third reported using a recreational vehicle (31% Barkerville; 31% Reference Site).
- Over half of all overnight travellers reported using a campground or RV park as their primary accommodation (Barkerville 51%; Reference Site 51%). Almost a third of travellers at both locations (30% Barkerville; 29% Reference Site) stayed at a resort/hotel/motel and still fewer were staying with friends or relatives (14% Barkerville; 15% Reference Site).
- Almost a fifth of Independent travellers to Barkerville (19%) and over a quarter (26%) of Reference Site travellers indicated they were touring with no specific destination. Independent travellers to Barkerville were more likely to select a destination in Canada (78% Barkerville; 62% Reference Site) and in particular a destination in the Cariboo Chilcotin Coast region (55% Barkerville; 33% Reference Site) and in the Quesnel area (45% Barkerville; 13% Reference Site).
- Travellers who were interviewed at the Reference Site were asked if they had been to the Quesnel area in the past. Overall, 61% indicated they had. Respondents were also asked about the number of trips they had taken in the past two years. Almost a third (30%) reported taking between one and three trips while a smaller proportion (6%) reported taking 10 or more trips to/in the region in the past two years. Almost a half indicated that they had not taken a leisure trip to the region in the past two years (50%).
- Follow-up survey respondents were asked whether they considered other destinations or routes when planning their trip. The majority of travellers did not consider other destinations or routes. Amongst those that did consider alternatives, the largest group of those interviewed at Barkerville were deciding between other routes or destinations in the Thompson Okanagan (21%) or Cariboo Chilcotin Coast region (21%) whereas those from the Reference Site were considering alternate destinations in the Northern BC (25%) and to a slightly lesser extent the Cariboo Chilcotin Coast region (23%). Alberta was considered as an alternative for nearly a tenth of those survey participants whereas less than a tenth of travellers who consider alternative destinations considered destinations or routes in the US.
- When asked about reasons for choosing their primary destinations or routes, visiting friends and family (22%) and a new or recommended location or as part of a tour (17%) were the most frequently stated reasons for those follow-up survey respondents from the Reference Site (22%), while visiting attractions (27%) and friends and family (17%) were cited most often by those from Barkerville.
- Almost all travellers interviewed indicated they would be stopping and spending time in the Quesnel area. Independent travellers at Barkerville were noticeably less likely than those from the Reference Site to be passing through the Quesnel area. Among those who indicated that they would be stopping in the Quesnel region, Barkerville independent travellers reported slightly shorter average stays in the area (2.8 days Barkerville; 3.4 days Reference Site).

- Among independent travellers to Barkerville, US visitors reported the longest overall trip duration averaging 43 days away from home, followed by international travellers (36 days), those from other Canadian provinces (19 days) and BC residents (8 days). International visitors reported the longest trip duration in BC (24 days) followed by US visitors (14 days), other Canadians (12 days) and BC residents (7 days). International visitors spent the most time in Quesnel (3.2 days) whereas there was no noticeable difference in the amount of time spent in Barkerville by those from the US, BC or elsewhere in Canada.
- There were considerable differences in trip duration by market origin between independent travellers at Barkerville and those interviewed at the Reference Site. At Barkerville, independent international travellers spent an average of 36 days away from home, whereas those interviewed at the Reference Site spent an average of 44 days away from home. US travellers interviewed at the Reference Site tended to have longer trips, on average (43 days Barkerville; 46 Reference Site), as did independent travellers from Canadian provinces other than BC (19 days Barkerville; 21 days Reference Site) who also spent more time in the region (3 days Barkerville; 5 days Reference Site). Independent British Columbia travellers interviewed at the Reference Site also tended to have longer trips on average (8 days Barkerville; 12 Reference Site) and spent more time in the province (7 days Barkerville; 10 days Reference Site).
- Follow-up survey respondents at Barkerville and the Reference Site were quite similar to each other with respect to their travel planning horizons. The majority of travellers spent 3 or more weeks planning their trip, with most travellers starting planning for their trip 13 or more weeks in advance.
- Advice from friends and relatives, past experience and visitor guides and brochures were the top three sources of information Barkerville follow-up respondents found to be *most useful before their trip* whereas Reference Site visitors found visitor centres, visitor guides and brochures and past experience to be most useful to them in planning their trip. Reference Site visitors were much more likely to cite the use of visitor centres and visitor guides and brochures than those from Barkerville. Also important, but less frequently used information sources included general Internet sites, travel guidebooks and local/regional tourism sites.
- When asked to identify sources of information they used during the trip, there was consistency in the top 5 information sources used by follow-up survey respondents from both Barkerville and the Reference Site; however the usage varied between survey locations. Visitor guides and brochures used most frequently at Barkerville whereas visitor centres were cited most often by those interviewed at the Reference Site.
- Travellers to both Barkerville Historic Town and those intercepted at the Reference Site were very similar in terms of the travel arrangements they made during their trips. Overall, almost two-thirds of all accommodation arrangements were made *during* the trip, while nearly all purchases regarding permanent attractions, events, and other activities were completed enroute. Three-quarters of the survey participants also made all their transportation purchases while travelling.

- When asked about leisure activities participated in during the trip, the top three activities mentioned by follow-up respondents from Barkerville included visiting parks, strolling around observing buildings and architecture and shopping for local arts and crafts. Activities most frequently participated in by those from the Reference Site included visiting parks, strolling around observing buildings and architecture and wildlife viewing. Almost a third of travellers from the Reference Site also visited a museum, heritage or historic site.
- Follow-up survey respondents were also asked about activities they participated in while in the Quesnel area. The most frequently selected activity for travellers at both sites was strolling around observing buildings and architecture, visiting parks and shopping for local arts and crafts. Whereas visitors to Barkerville were more likely to attend a theatre or performing art, visit an art gallery or studio or partake in fine dining, they were less likely than those from the Reference Site to hike, visit a farm, farmers' market, orchard or food processor or participate in fishing while travelling in the Quesnel area.
- Visitors were asked about the total amount of time they were planning to spend at Barkerville. Almost three-quarters of visitors (73%) indicated they would be spending one day or a part of one day at the attraction. The remaining quarter (27%) of visitors indicated that they would be spending between 2 and 8 days at the site, with the largest proportion (22%) of multi-day visitors planning to spend 2 days onsite. Visitors were also asked to indicate the total number of hours they planned on spending on site. Over three-quarters of visitors (78%) indicated that they planned on spending between two and eight hours at Barkerville.
- Visitors to Barkerville were asked what made them decide to visit Barkerville Historic Town. The most commonly cited reason was to learn about the history of the area (28% of all Barkerville visitors mentioned this as a reason for their visit). Experiencing the history of the area was the second most often cited reason (19%), followed by seeing what the 1860s were like (12%).
- When asked how they had heard about Barkerville, almost three-fifths (60%) cited personal knowledge for their level of awareness but there were practical differences between independent respondents at Barkerville and those interviewed at the Reference Site (65% Barkerville; 50% Reference Site). A quarter of all travellers (24% Barkerville; 24% Reference Site) had heard about Barkerville from family and friends.
- Overall, visitors to Barkerville were very satisfied with their experience and all aspects of Barkerville. A total of 98% of Barkerville visitors that were interviewed rated the overall experience at Barkerville a 4 or better on a scale of 1 to 5, with 77% providing a rating of 5. When asked about specific elements of the Barkerville experience, the highest ratings were given to site personnel (85% rated them as a 5 out of 5).
- In order to identify areas where Barkerville Historic Town is currently meeting and/or exceeding consumer expectations, respondents to the follow-up survey were asked about their satisfaction and perceived importance for various trip factors. On most factors, Barkerville Historic Town met travellers' expectations. However, quality of food and beverage services was an area of concern

as it was rated above average in importance by visitors but received below average ratings on satisfaction.

- Visitors to Barkerville were asked to provide detailed information about their spending while at the attraction. Of the total dollars that visitors reported spending, one-third (33%) was spent on admission, followed by food and beverage (29%) and souvenir/gift shop purchases (23%). On average, visitors reported that their travel parties spent \$157.11 while on site. The highest average spending was on accommodation (average expenditure among those who made a purchase in this category was \$100.30) and these types of purchases were made by 20% of visitors.
- Over a third of visitors to Barkerville stated that they would be either very (23%) or somewhat (14%) likely to return in the next 12 months. Just over half of all visitors (57%) stated that they would likely not be returning to the attraction in the next year. The vast majority (98%) stated that they were very (84%) or somewhat likely (15%) to recommend Barkerville Historic Town to friends and family whilst only 1% stated they would not recommend it at all.
- When asked about the importance of the attraction to their decision to visit the Quesnel area, over three-quarters (77%) of visitors to Barkerville Historic Town stated that it was either a very important factor (13%; rating of 7-9 on a 10 point scale) or the single most important factor (64%; rating of 10).
- Travellers at the Reference Site were asked if they had heard about Barkerville Historic Town and if they had visited or planned on visiting Barkerville during their trip. The majority of Reference Site travellers (91%) reported having heard of Barkerville before. Over half (55%) of travellers at the Reference Site had stopped (15%) or planned to stop (40%) at Barkerville. However, another two-fifths (44%) of respondents had not stopped and did not plan on stopping. The most common reason cited for not stopping at Barkerville was time constraints (62%).
- Over half of Reference Site visitors who completed the follow up survey had stopped at Barkerville Historic Town during the trip on which they were interviewed.
- In describing what they believed were the unique aspects of Barkerville Historic Town, follow-up survey respondents cited originality and authenticity, the use of street or theatre performances and period costumes and it's historical significance and depiction of the history of the area. Other aspects mentioned were it's educational value, the quality of the site (i.e. well-maintained or laid out), opportunities for interaction, availability of theatre and plays, good customer service, guides/interpreters and delivery of an entertaining and interesting experience.
- When asked about the perceived positive aspects of Barkerville Historic Town, follow-up survey respondents cited the high level of customer service provided as the most positive aspect of Barkerville, followed by it's originality, uniqueness or authenticity and the use of street or theatre performances and period costumes. Other positive characteristics mentioned included the quality of entertainment and educational value of the information provided.

- When it came to perceived negative images or characteristics of Barkerville Historic Town, the top two responses provided by follow-up survey respondents were comments about factors external to Barkerville which were either impossible or difficult to mediate, including location/remoteness of the facility and the weather. Other frequently mentioned factors included limited food facilities and options, limited activities and attractions, poor customer service and cost.
- When asked about activities, services, and additional attractions they would like to see if they were to revisit Barkerville Historic Town, the most frequent responses from those who completed the follow-up survey included better food facilities and selection, more actors/street performers and live theatre, increased opportunities for interaction and more carriages and horses. Other frequently mentioned activities, services or attractions included expanded restoration, more exhibits and demonstrations, campground/RV facilities, more information on historic events, more guided tours and interpreters and rest/picnic areas.
- Both Barkerville visitors and Reference Site travellers were asked if they visited any other heritage or historical attractions in British Columbia on their trip. Almost half of the respondents to the follow-up survey indicated that they had. Respondents from outside Canada were much more likely to visit heritage or historical sites in BC than were those from Canada. Reference Site visitors were also more likely to visit other heritage or historical attractions in BC than were those interviewed at Barkerville.
- The follow-up survey also asked visitors to Barkerville Historic Town to name other heritage attractions they visited on their trip. Attractions in the Northern BC region were mentioned most often followed by those in the Cariboo/Chilcotin/Coast region.
- When asked if they were likely to return to the Quesnel area for a future leisure trip, over three-fifths of survey participants indicated that they would whereas one eighth of travellers indicated they were not likely or not at all likely to return to the region.
- Respondents to the follow-up questionnaire were asked about their satisfaction with their trip in British Columbia. The majority of travellers were very or somewhat satisfied with their trip. Travellers to Barkerville were noticeably more satisfied than those from the Reference Site. In terms of their likelihood of taking another leisure trip to/in British Columbia, the majority of travellers from both sites indicated they would return for a future trip.
- Overall, travellers reported an average spending of \$171.68 per day for their travel party (and \$69.22 per person) during their trips. Respondents from Barkerville spent slightly more than average at \$180.91 per day whereas parties at the Reference Site spent \$143.75, much less than the average and their counterparts who were interviewed at Barkerville. The difference between the two groups was less pronounced when examining total per person expenditures as Barkerville visitors spent an average of \$69.63 per day, compared to \$67.96 per day for each Reference Site traveller.

- Over two-thirds of travellers intercepted at the Reference Site used the internet regularly. Subsequent responses from the follow-up survey showed that the most frequently selected activity for travellers at either site was watching video clips online. Other frequently mentioned online activities participated in by visitors to Barkerville included visiting photo sharing websites and creating a profile on a social network. Visiting photo sharing websites and reading blogs and weblogs rounded out the top three online activities for travellers from the Reference Site.
- Two-fifths of respondents from both Barkerville and the Reference Site indicated that they always used the internet for trip planning purposes. Another quarter of respondents from both sites often used the internet when planning their trip whereas less than 5% did not use the internet at all.
- Internet planners (i.e. those who always, often or sometimes use the internet for trip planning) were asked about the travel planning stage at which they used the internet. Reported usage levels were at their peak at the beginning followed by a drop during and especially after the trip.
- Internet planners were asked about online activities they had partaken in while planning a trip. Respondents from both locations were fairly similar in their reported use of the Internet. The top three online activities reported by both groups included printing out maps or directions, requesting printed materials/brochures and looking at other consumer comments/materials.
- In an effort to understand how travellers interpret/judge online accommodation ratings, respondents who agreed to participate in the follow-up online survey were shown a picture of Trip Advisor rating generated by other travellers providing a rating out of 4.5 out of 5. Respondents were asked how likely they would be to choose this accommodation over an accommodation that was rated a 4 (on the same website). Almost a fifth of these respondents were very likely whilst two-thirds were likely or somewhat likely to choose the accommodation based on the rating summary.
- In an effort to further understand how travellers interpret/judge online accommodation ratings, follow-up online survey respondents were also shown a Canada Select rating for the same accommodation property, providing the hotel with a 3 star rating. Respondents were asked which of the two ratings, Trip Advisor Rating (4.5 out of 5) or Canada Select Rating (3 out of 5), would influence them more if they were considering booking this accommodation. Over two-fifths of respondents did not know which rating to choose. Of those that did, Trip Advisor was picked by almost a third compared to a quarter for Canada Select.
- In order to understand how travellers are influenced by various factors during the pre-booking phase, respondents who agreed to participate in a follow-up online survey were asked how likely they were to consider reviews such as travelblogs and consumer ratings before pre-booking an accommodation. Over a third of these respondents were somewhat likely, over a quarter were likely and almost a fifth were very likely to choose the accommodation based on information obtained from these reviews.

- In order to understand how travellers are influenced by quality assurance ratings during the pre-booking phase, respondents who agreed to participate in a follow-up online survey were asked how likely they were to consider quality assurance ratings (i.e. AAA/CAA, Canada Select, etc.) before pre-booking an accommodation. Over a fifth of these respondents were very likely and almost two-thirds were likely or somewhat likely to choose their accommodation based on information obtained from these ratings.
- In order to learn about the future intentions of these travellers and to understand the influence of online videos on travel behaviour, respondents who agreed to participate in a follow-up online survey were asked to choose an activity they would be more likely to consider participating in on an upcoming overnight leisure trip. Respondents were subsequently provided with a promotional video clip * of the activity somewhere in British Columbia. Respondents were generally in agreement with the usefulness of the videos. On average, around two-fifths of respondents indicated that they would share the video clip if they knew family or friends who were interested in the activity in British Columbia.

Based on the above findings and others found within this report, the following conclusions can be stated:

1. Almost all (98%) travellers to Barkerville Historic Town responded that they were satisfied with their experience at the site, over one third of visitors stated that they would be likely to return in the next 12 months, and 98% stated that they would recommend Barkerville to friends and family. Satisfaction with site personnel at the facility received the highest rating, with 85% of Barkerville visitors rating the staff a 5 out of a possible 5. Well over three-quarter of visitors to Barkerville, both those stopped at the location and at the Reference Site, indicated that their visit to Barkerville was either a very important factor or the single deciding factor in their decision to visit the region. All of these factors combined point to the importance of Barkerville as a contributor to the regional tourism sector and the positive influence the site is having on visitor experience.
2. Visitors to Barkerville were motivated to learn about and experience the site for its historical significance and depiction of the history of the area. Visitors were most impressed with the high level of customer service, the site's originality, uniqueness or authenticity and the use of street or theatre performances and period costumes, although areas of improvement were highlighted with regard to controllable factors such as limited food facilities/options, limited activities/attractions and cost.
3. When asked about their satisfaction and perceived importance of various trip factors, respondents felt Barkerville Historic Town met their expectations for the most part. However, if they were to revisit Barkerville Historic Town, respondents wanted to see improvements including better food facilities and selection, more actors/street performers and live theatre, increased opportunities for interaction, more carriages and horses, expanded restoration, more exhibits and demonstrations, campground/RV facilities, more information on historic events, more guided tours and interpreters and rest/picnic areas.

* "Videos were obtained from You Tube, produced by Tourism British Columbia field reports."

4. Online media including local/regional tourism sites, other internet sites, HelloBC.Com and traveller commentary sites are becoming increasingly useful sources of information for travellers. Although its use was lower during the trip, perhaps due to limited accessibility to the internet in rural and interior regions of the province, online media continues to make inroads in trip planning. The influence of one such source, online videos, was examined in this study. Respondents were generally in agreement with the usefulness of the videos and two-fifths indicated they would share the video clip if they knew family or friends were interested in the activity in British Columbia. This highlights the opportunities and challenges of using online media for marketing purposes. Done properly, the viral impact that can arise from the sharing of video clips and other online information (e.g. travel blogs) with one's network of contacts can have a huge payoff at minimal cost. As illustrated by the video clips, success in this arena will require content that is relevant, accurate, informative and of a professional quality.