

Short-Haul Consumer Research

Summary
April 2015

Study Background and Objectives



The short-haul markets of British Columbia, Alberta, and Washington State are important to BC's tourism sector. Together these markets represented 77% of visitation and 55% of visitor expenditures in 2012.

The provincial tourism system has historically aligned development and marketing activities within government defined administrative boundaries such as tourism regions, cities and communities. These boundaries may not correspond with consumers' perceptions of potential destinations.

Consumers in short-haul markets likely define destinations independently of administrative boundaries, due to greater familiarity with British Columbia's destinations compared with long-haul travellers. Furthermore, the motivations for a trip to/in British Columbia will likely be different for BC's short-haul markets compared to long-haul markets, where Destination BC has traditionally focused marketing efforts.

In order to assist with the development of a strategy for the short-haul markets, research was needed to determine how short-haul travellers decide to come to British Columbia, what they perceive of as possible destinations within the province and the experiences that consumers seek within these destinations.

Based on these needs, three objectives were identified:

1. Determine what the motivations are behind the process of deciding to take a trip to British Columbia by short-haul consumers.
2. Determine what short-haul consumers define as destinations within British Columbia (through past and future trips to British Columbia) and noting any seasonal differences.
3. Determine what experiences short-haul consumers are seeking within identified British Columbia destinations.

Destination BC engaged Ipsos Reid to undertake the necessary research by combining qualitative and quantitative research methods. Consumers in British Columbia, Alberta, and Washington State were the focus of this research. Throughout this report, the abbreviation **SHCs** is used to represent *short-haul consumers*. **SHCs** are at least 18 years of age and have either visited BC on an overnight leisure trip in the last two years or plan to visit BC on an overnight leisure trip in the next 12 months. An overnight leisure trip is defined as a trip where consumers stayed at least one night in paid accommodation.

Qualitative:

- Iterative online discussion over three days in July 2014

Participants must:

- Be aged 18 years or older.
- Have taken at least one overnight leisure trip to British Columbia within the past two years and/or are planning to take an overnight leisure trip to British Columbia within the next 12 months.

Total participants in online discussions: 60

Quantitative:

- 20-25 minute online survey in August & September 2014

Respondents must have either:

- Visited BC in the last two years on an overnight leisure trip OR
- Expressed a high likelihood of visiting BC in the next 12 months on an overnight leisure trip.

Total sample from all markets: 2,260



Objective

Summary of Findings

1

Determine what the motivations are behind the process of deciding to take a trip to British Columbia by short-haul consumers.

SHCs are most strongly motivated by trips of a few days relaxing, having fun and experiencing nature. They travel to visit specific places they have built an awareness of and often return.

2

Determine what short-haul consumers define as destinations within British Columbia (through past and future trips to British Columbia) and noting any seasonal differences.

SHCs usually define destinations by city and most frequently identify destinations in the south (particularly Vancouver, Victoria and Whistler) as short-haul destinations. Destinations further north are less frequently considered for short-haul travel.

3

Determine what experiences short-haul consumers are seeking within identified British Columbia destinations.

Nature, Fun and Relaxation are the main experiences that SHCs are seeking in BC; however, the most commonly visited locations (Vancouver and Victoria) are more associated with Sightseeing, Shopping and Culture.

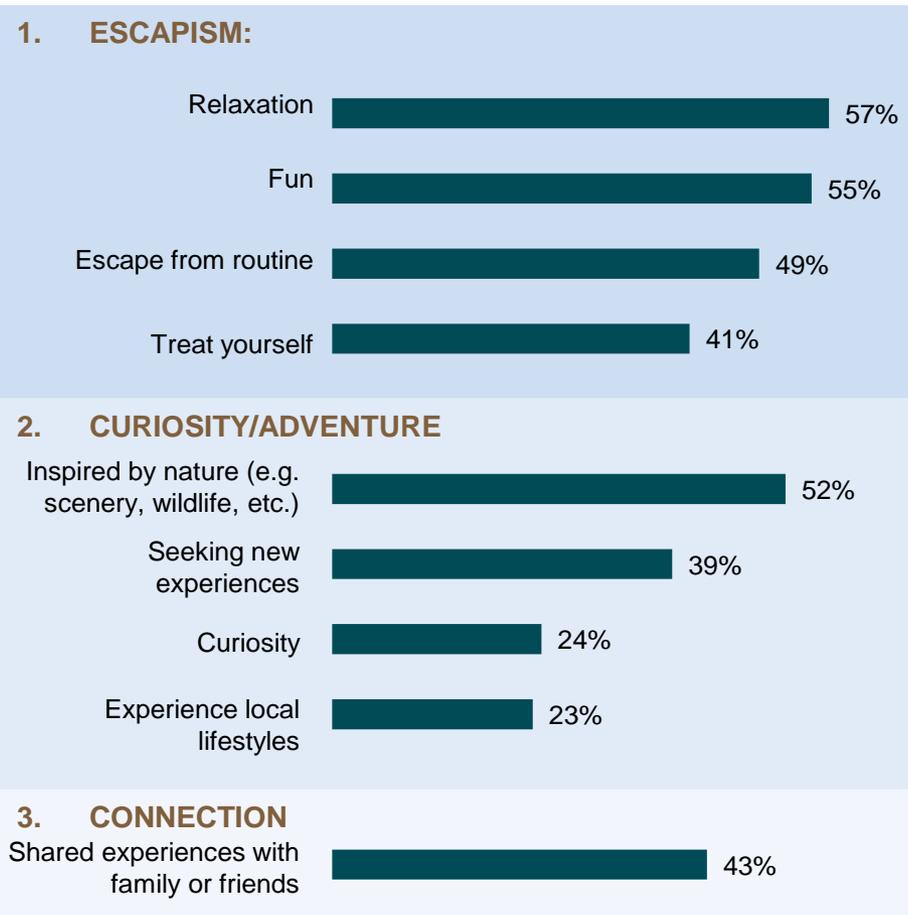
OBJECTIVE 1: Determine what the motivations are behind the process of deciding to take a trip to British Columbia by SHCs.



What motivates you to want to travel in/to British Columbia?

Desire to travel

- Desire to travel is motivated by ever present 'emotive drivers'. These are: **The desire to escape, curiosity/adventure**, and **connection**.
- The main reasons why SHCs say that they travel to BC are to **Relax, Have Fun** and **Be Inspired by Nature**.
- There is high interest in travelling to BC amongst SHCs. BC is an attractive destination, with a good reputation for delivering an enjoyable experience (91% rate their experience as excellent or good). However, there is mixed knowledge and awareness of destinations in the province.
- SHCs report qualitatively that they are attracted to BC for a number of reasons, including the **diversity of offerings**, the **natural environment** and **temperate weather**.



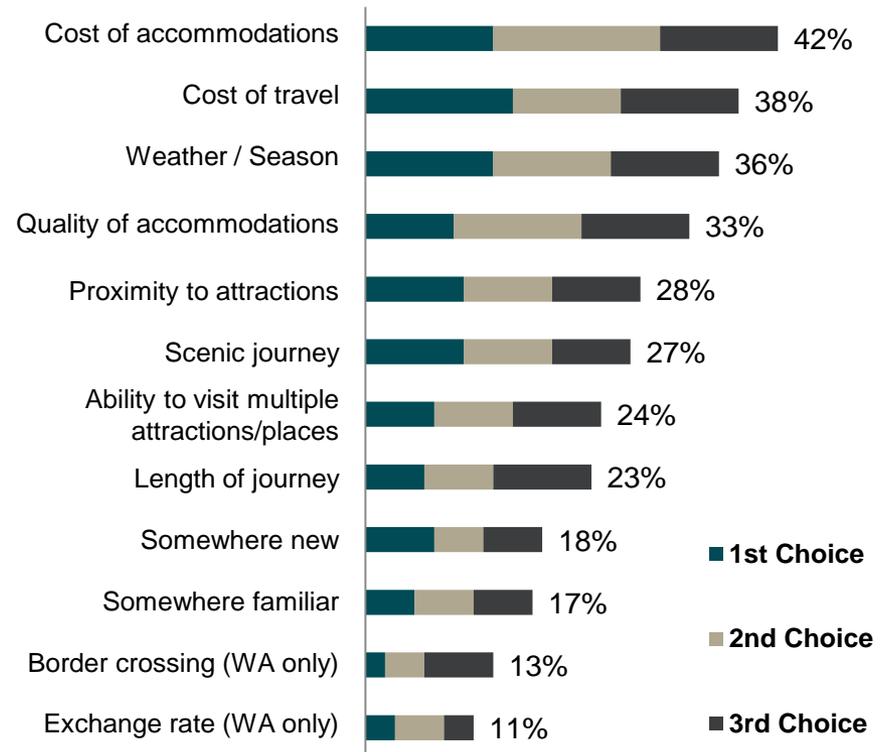
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Decision to take a trip

- The decision to act on emotive drivers and travel is influenced by functional considerations, most commonly: **Cost of Travel** (especially BC), **Cost of Accommodations** (especially BC) and **Season/Weather** (especially Lower Mainland and Alberta).
 - Cost can discourage SHCs from visiting BC sooner and BC’s size can increase travel time and prevent SHCs from travelling farther.
 - Higher sensitivity to cost among BC residents may reflect the desire to travel cheaply when taking a trip within their own province vs. travelling elsewhere.
 - Albertan SHCs are significantly less likely than others to travel to BC during Winter.
- In qualitative discussions, **amount of time available to travel** and the **needs of travelling companions** were also important.

When thinking of planning an overnight leisure trip in/to British Columbia, which of the following factors are most important to consider?



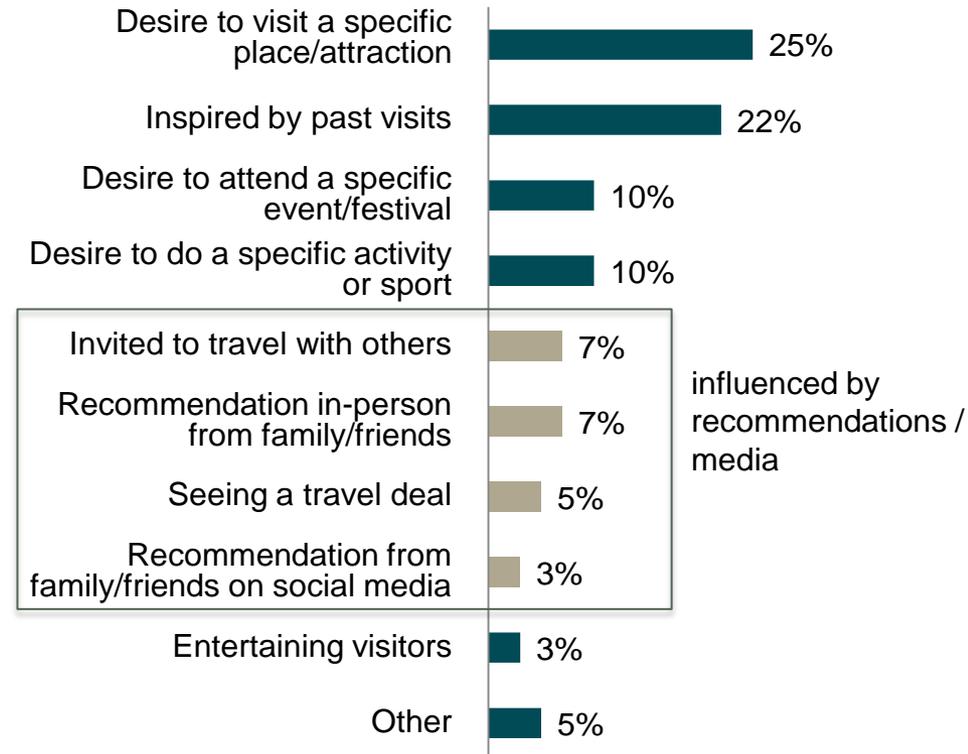
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Choice of destination

- The majority of SHCs travel to BC based on a desire to visit a **specific place or attraction** that they are already aware of or to **go somewhere inspired by past trips**.
 - A large proportion of trips are inspired by past visits to BC. Most SHCs to BC have **visited a BC destination more than once** (86%) and when they do so, they usually **do the same things they did previously** (62%).
- Being attracted by a **specific event/festival/sport/activity** and **recommendations** (online or in person) are more significant in the decision making process than media sources: adverts, deals or articles.
- **Travel retailers** or **online review sites** were the most cited sources for travel deals.

Thinking about the last time you travelled in/to British Columbia, what first made you consider a trip there?



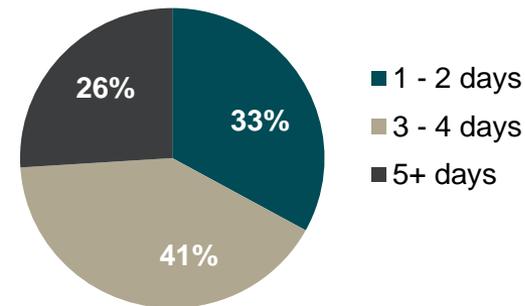
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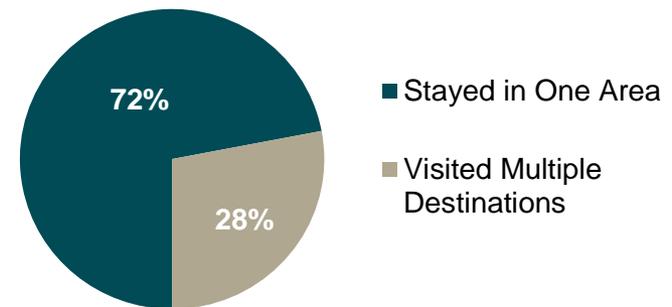
Defining short-haul Travel

- Short-haul trips to/within BC are most commonly 3-4 days in length (41%), though trips of only 1-2 days are also common (33%, less in Alberta).
 - ‘Vacations’ of over five days are less common (26%), though more common among SHCs from Alberta (43%). Trips of this length may not be considered short-haul travel and SHCs often prefer to travel farther than BC when taking ‘Vacations’.
- Short-haul trips most commonly **focus on a single destination** rather than multiple destinations (72%).
 - Just over a fifth of SHCs travel to multiple destinations (especially Albertan SHCs), usually staying at each before touring to the next.

Length of Trip



Visited One Area or Multiple Areas



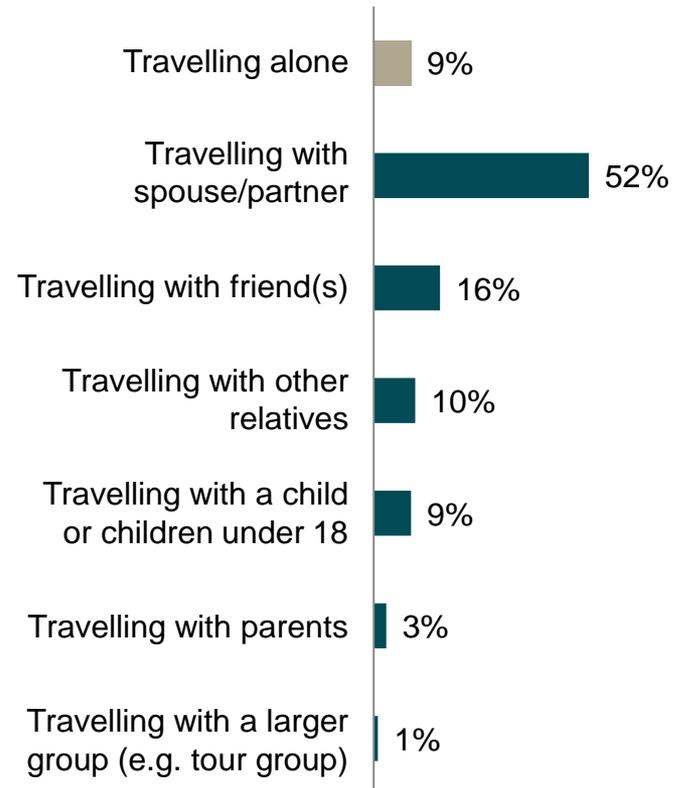
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Travel Behaviours

- The majority of SHCs **travel by car** when travelling short-haul as an affordable and feasible mode for short trips. However, **flying** is not uncommon among SHCs from Alberta (25%).
 - For most, the driving journey is an enjoyable part of the trip and involves brief stops for sightseeing en route to their destination. On the other hand, some prefer to simply reach their destination(s) directly.
- **Travel companions** are important motivators and influencers of short-haul travel (42% of SHCs consider shared experiences with family or friends as a motivating factor in and of itself). For many, companions are key to the expected travel experience.
 - Less than one in 10 SHCs travel alone (9%) with the vast majority of SHCs travelling with family (74%, including partner, child or other relatives).

Composition of Travel Party



OBJECTIVE 2: Determine what SHCs define as destinations within British Columbia (through past and future trips to British Columbia) and noting any seasonal differences.



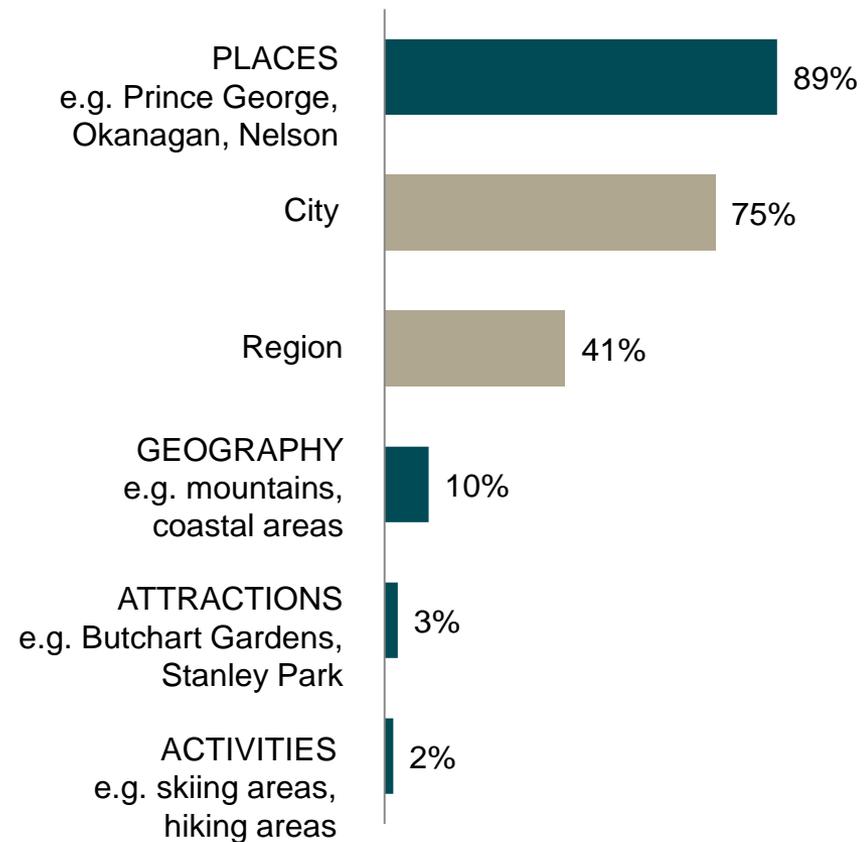
Defining the Destination

- The majority of respondents define their destination as the **city** they are visiting, though they also occasionally define the destination by **region**, **activity** or **nearby attractions/geographical features**.

Desired Destinations

- SHCs are most strongly aware of and interested in visiting destinations in southern BC: **Vancouver**, **Victoria**, **Whistler** and the **Okanagan** (especially **Kelowna**).
 - Washington SHCs (other than those from Spokane) are especially focused on **Vancouver**, **Victoria** and **Whistler**.
 - Given their location, Albertan SHCs are less likely than others to have visited or want to visit **Vancouver**, **Victoria** or **Whistler** and somewhat more likely to visit or want to visit the Okanagan than other SHCs.

When you think of overnight leisure trips in British Columbia, which destinations, regions or areas are you most interested in visiting?



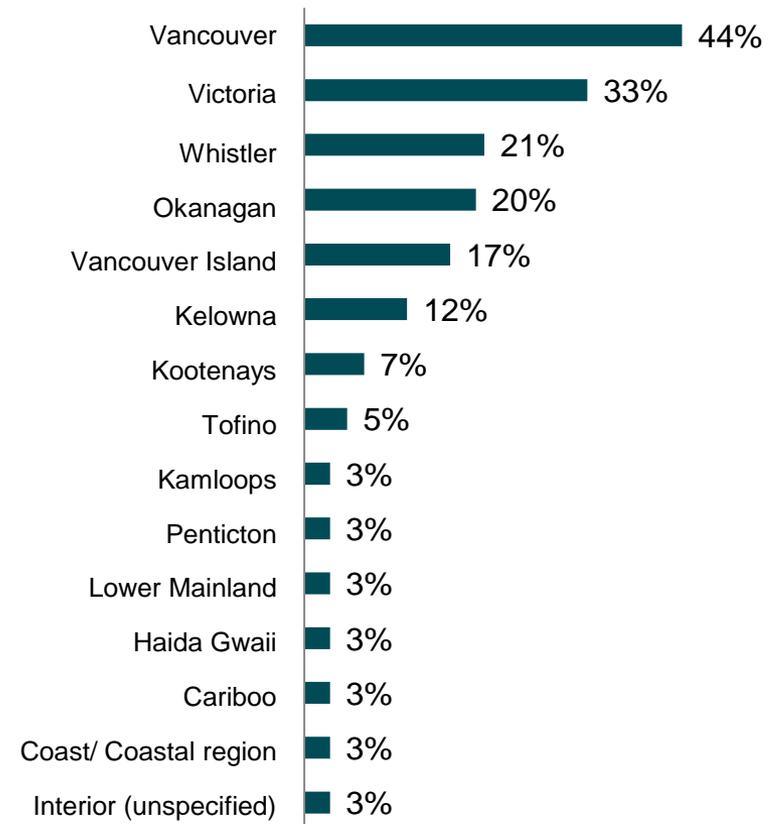
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Desired Destinations (Continued)

- Northern BC and, to a lesser extent, the Cariboo Chilcotin Coast are less well known (especially by non-BC residents) and require SHCs to travel longer distances; and as a result attract less interest. Northern BC in particular may not be considered short-haul travel to those who do not live close to that region.
- The majority of destinations mentioned were associated with Summer, with significantly fewer mentioned in relation to Winter (more common among Washington based SHCs).
- The **top destinations visited are largely consistent across seasons**, with the exception of Whistler (which is predominantly visited during Winter) and the Kootenays which were visited in Winter far less than in other seasons.

When you think of overnight leisure trips in British Columbia, which destinations, regions or areas are you most interested in visiting?



OBJECTIVE 3: Determine what experiences SHCs are seeking within identified British Columbia destinations.



Desired Experiences

- The specific experiences that SHCs are most frequently seeking to have are:
 - To experience **Nature and Scenery**
 - **Relaxation**
 - **Sightseeing**
 - Visiting **National/Provincial Parks**
 - Enjoying **Beaches, Lakes and Rivers**.
- Experiences featuring **Beaches/Lakes/Rivers, Nature/Scenery, Vineyards/Wine, Outdoor Activities, Hiking and Camping** are those most frequently associated with familiar BC destinations.
- Desired experiences in most frequently mentioned destinations Vancouver and Victoria are very different from the desired experiences from other destinations, focusing on **City Sightseeing, Shopping** and **Arts/Culture/History**.

How familiar are you with each of the following destinations, and what are the top two leisure attractions/activities that you associate with that destination?

Destination	Most commonly related activity	Second most commonly related activity
Vancouver	City Sightseeing (47%)	Shopping (24%)
Victoria	City Sightseeing (46%)	Arts/Culture/History (26%)
Vancouver Island	Nature and Scenery (22%)	Beaches/Lakes/Rivers (17%)
Kelowna	Beaches/Lakes/Rivers (35%)	Vineyards/Wine (22%)
Whistler	Skiing/Snowboarding (43%)	Outdoor Activities (26%)
Okanagan	Vineyards/Wine (33%)	Beaches/Lakes/Rivers (28%)
Penticton	Beaches/Lakes/Rivers (34%)	Relaxing (17%)
Vernon	Beaches/Lakes/Rivers (27%)	Relaxing (17%)
Oliver/Osoyoos	Beaches/Lakes/Rivers (31%)	Vineyards/Wine (27%)
Tofino / Ucluelet	Beaches/Lakes/Rivers (34%)	Nature and Scenery (29%)

OBJECTIVE 3: Determine what experiences SHCs are seeking within identified British Columbia destinations.



Expected experiences

- There are common themes in what SHCs expect to experience in destinations of interest. It is possible to group destinations according to these themes as follows:

Northern BC

BC's lesser-known rugged north, defined by its vastness and wilderness.

Haida Gwaii

An intriguing, 'bucket list' destination distinct from Northern BC, and known for its unique First Nations culture and unspoiled natural environment.

Metro BC

BC's metropolitan hub, offering a range of world-class urban and natural experiences in close proximity.

The Kootenays

Known and visited for its mountains, National and Provincial Parks and natural attractions. Outdoor activities and nature are key here.

The Okanagan

BC's summer region, well known for its wineries, fresh produce and lakes. SHCs associate this area with travelling with family and friends more than anywhere else.

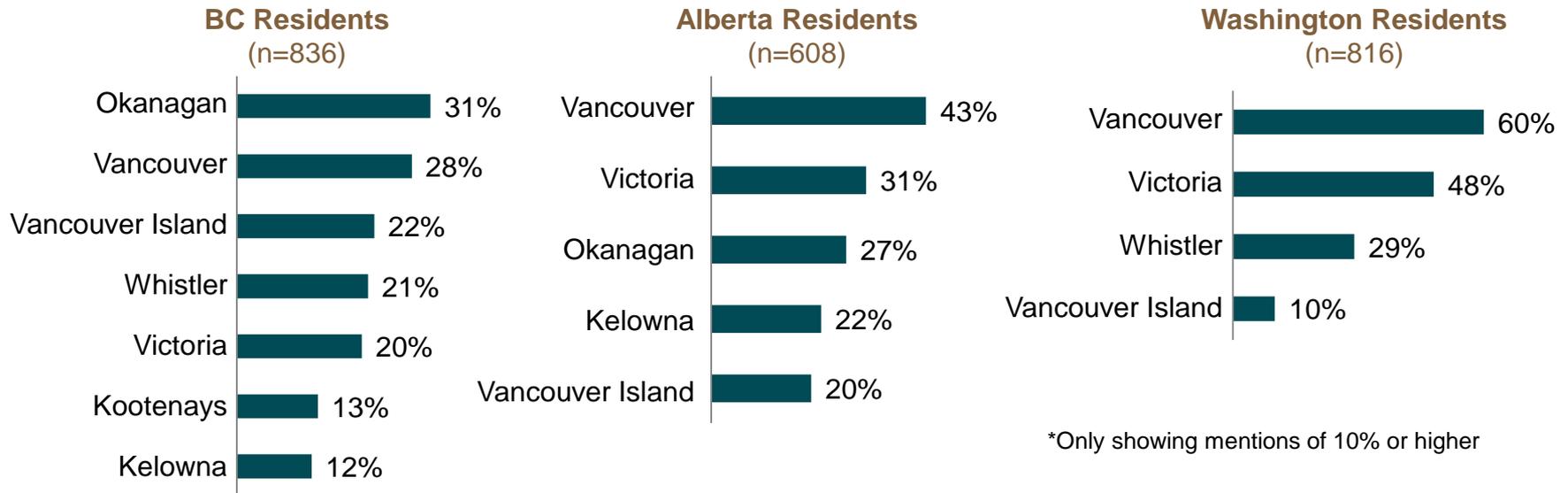
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US / Canada Differences

- **Canadian** SHCs show much greater familiarity with locations where they desire experiences relating to **Beaches/Lakes/Rivers** (e.g. Okanagan destinations and Tofino/Ucluelet) and **Vineyards/Wine** (e.g. Okanagan destinations) than SHCs from Washington.
- Washington-based SHCs have less familiarity with BC destinations overall beyond Vancouver, Victoria, Vancouver Island and Whistler and where they do have familiarity with other BC destinations, these are places associated with **Nature/Scenery** and **Outdoor Activities**.

When you think of overnight leisure trips in British Columbia, which destinations, regions or areas are you most interested in visiting?



A number of recommendations emerged from this research with respect to attracting short-haul consumers to destinations in British Columbia:

1 Appeal to the emotive drivers to inspire action.

2 Market to the desired experience and capitalize on the unique appeal of destinations.

3 Create fans from iconic experiences to encourage repeat visits and word-of-mouth recommendations.

4 Consider shared desired experiences in identifying potential opportunities for collaboration between cooperatives.

5 Be realistic about what constitutes short-haul travel.

6 Recognize the role of travelling companions and market to social aspects of travel.

For more details contact:



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