



2012 In-Market Research Report

Summary of Tourism Regions

Vancouver, Coast and Mountains (VCM)

Vancouver Island (VI)

Thompson Okanagan (TOTA)

Kootenay Rockies (KR)

Cariboo Chilcotin Coast (CCC)

Northern BC (NBC)



TourismBC

enrg RESEARCH GROUP



Executive Summary

This report summarizes key highlights for all six tourism regions from the British Columbia In-Market study conducted in November 2011 and April 2012. It focuses on the perceptions of all BC regions, drawing comparisons between the regions where appropriate. The full report on the findings, plus summaries of each BC tourism region are available under separate covers.

- *Destinations offering good value for money, a place to relax and unwind and that serve as a good getaway from everyday life are very important for visitors to BC's tourism regions.*
- *VCM, VI and TOTA are the most well-known BC regions, with widespread familiarity across all main centres and sub-regions.*
- *Key activities which motivated trips to BC were sightseeing, nature, wildlife viewing and visiting friends or relatives followed by hiking and visiting national or provincial parks.*
- *It therefore follows that visitors to BC are most likely to participate in sightseeing, nature, wildlife viewing, shopping, hiking, visiting friends or relatives and visiting parks on their trip.*
- *Just under half (52%) of respondents are likely to take a trip to the BC region they evaluated in the next two years. Vancouver Island is the destination most likely to be visited for overnight trips of any duration while VCM is the most popular destination for a day trip. Not surprisingly, summer is the most popular season for trips to BC.*
- *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. Smart phones (via Internet or an application) will be used by almost half (45%) during their visit.*
- *Lack of interest/no reason to visit and preferring to go somewhere else were cited as key reasons for being unlikely to visit the evaluated region within the next two years.*
- *At a total level, just over half (52%) of respondents have a very favourable overall impression of the region they evaluated. The rank order of impressions is VI, KR, VCM, TOTA, CCC and NBC.*



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 (including n=3,967 regional evaluations) were conducted in 2011/2012.

Region evaluations are as follows: VCM, n=746. VI, n= 711. TOTA, n=753. CCC, n=763. KR, n=459. NBC, n=536.

DATA ANALYSIS

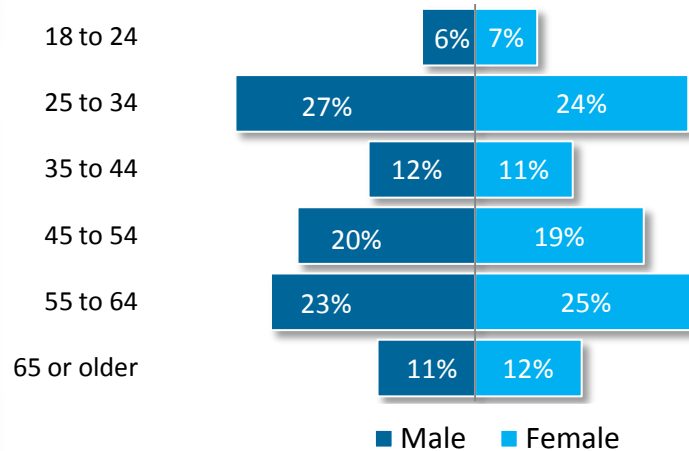
The data was weighted to accurately reflect the population of travellers from each of the markets profiled, based on region, gender, age and education.



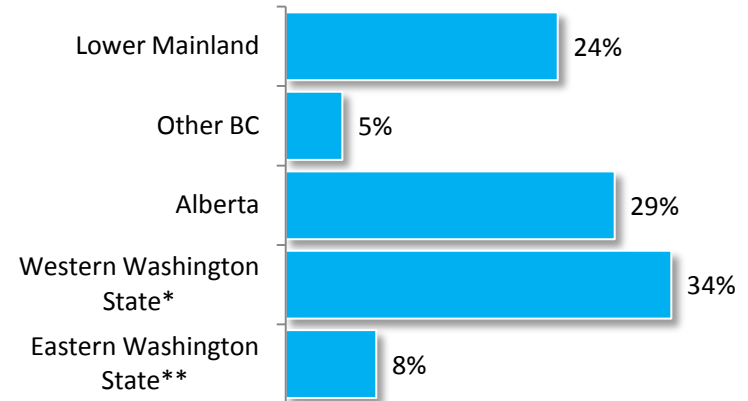
Respondent Characteristics – Total BC

- Respondents to the survey represent an even proportion of males and females, and spread of age; one-third were from Western Washington, followed by Alberta and the Lower Mainland of BC. They were predominantly post-secondary educated and with a wide range of income levels.

Gender & Age



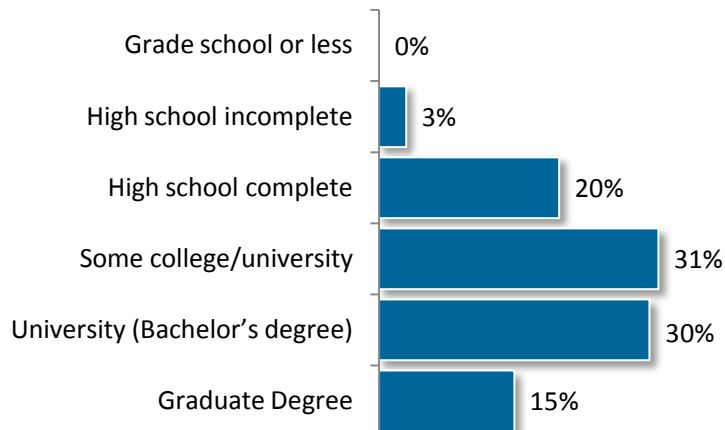
Respondent Origin



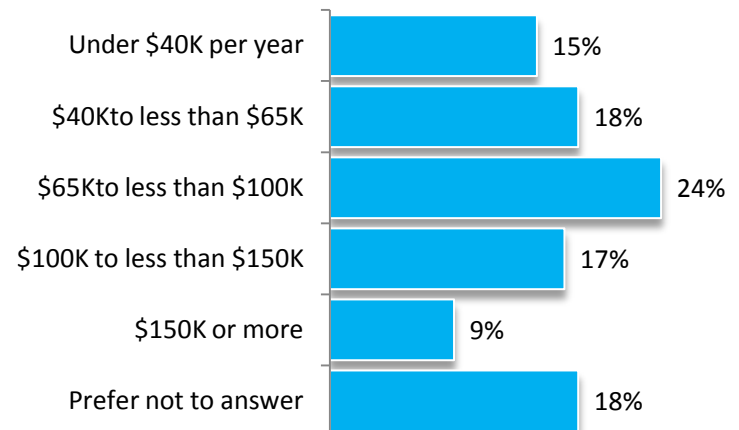
* Western Washington residents did not evaluate KR or NBC.

** Eastern Washington residents did not evaluate VCM, VI or CCC.

Education



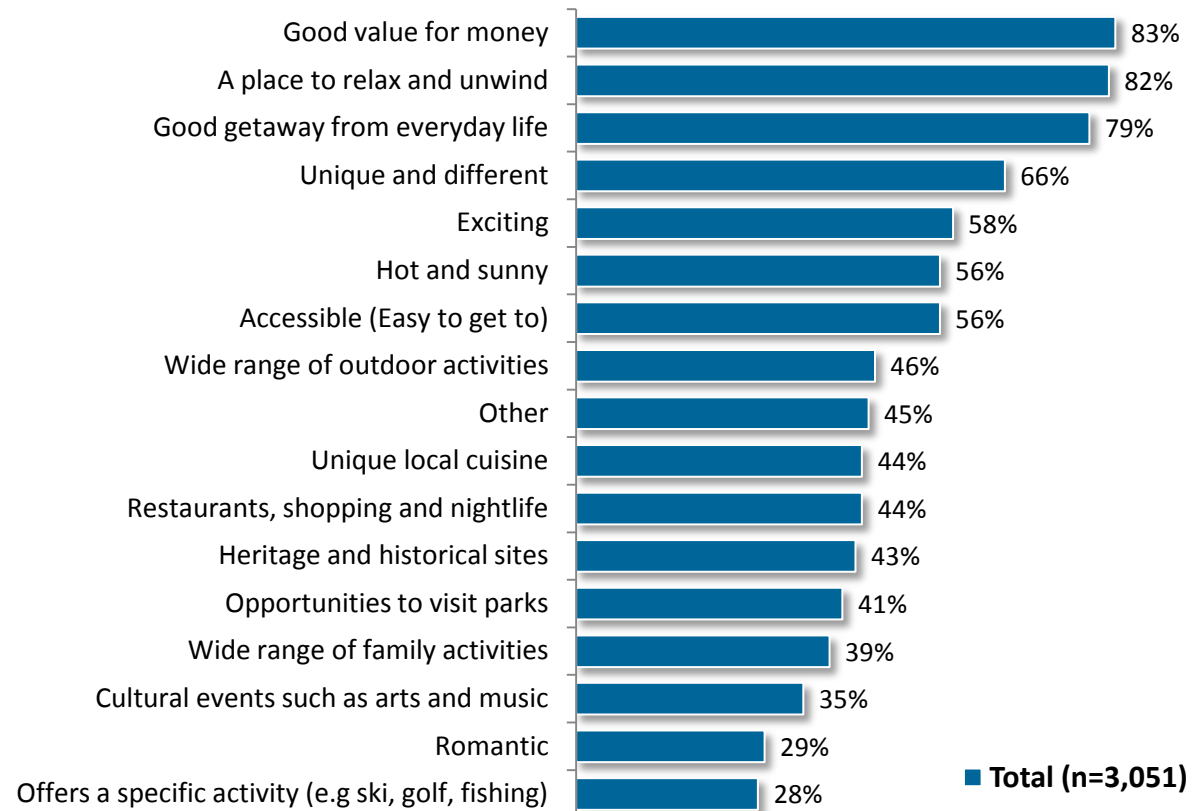
Household Income



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 which serve as a good getaway from everyday life.
- BC residents are more likely to be looking for destinations offering value for money, heat and sunshine and with family activities. Albertan residents also prefer hot and sunny destinations and those which serve as a good getaway from everyday life. In contrast, Eastern Washington residents are more likely to value destinations where they can relax and unwind.

Top Factors in choosing a destination – Total BC

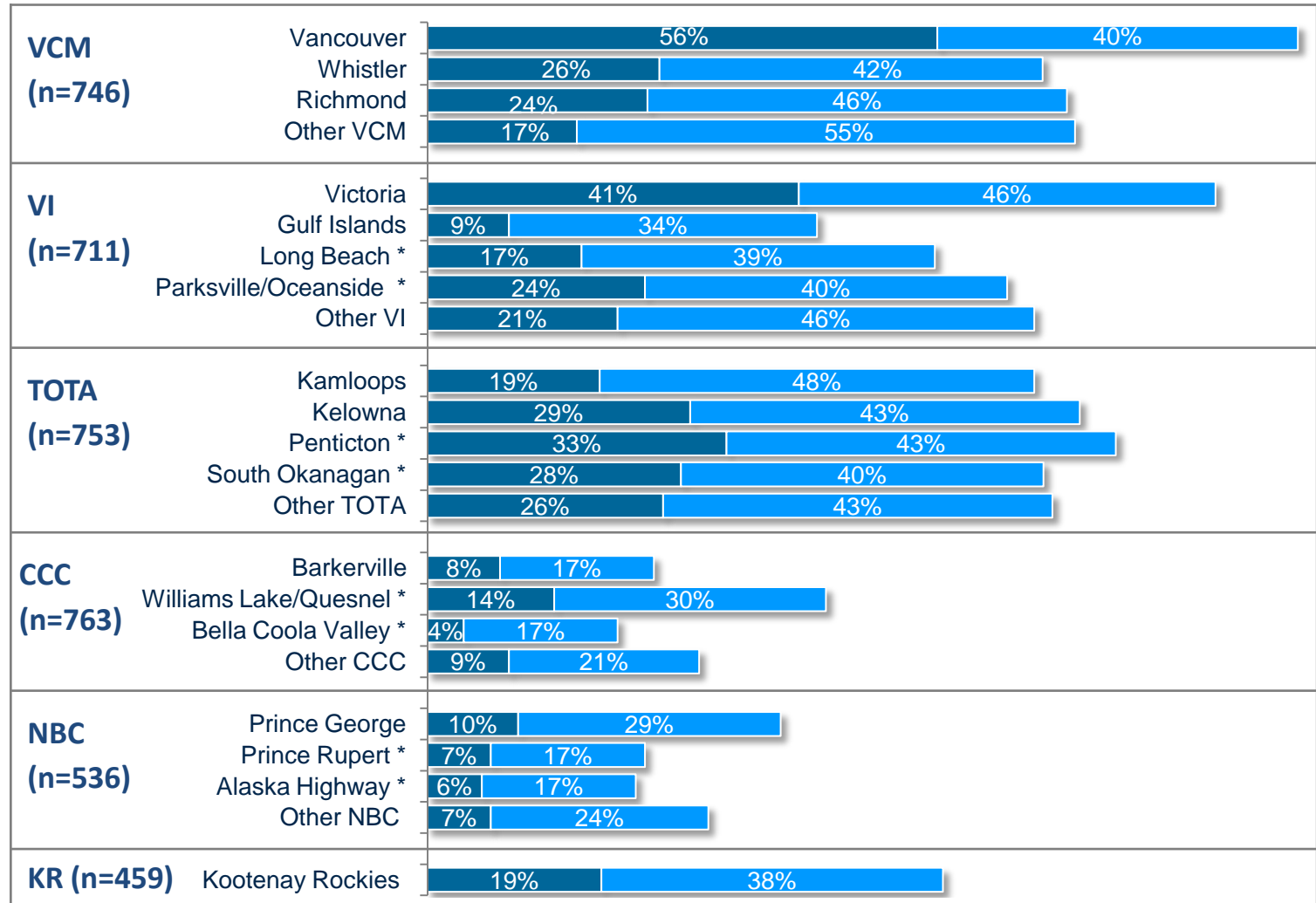


* Top 2 box includes ratings of 4 or 5 out of 5 on a 5 point scale where 1 is 'Not at all important' and 5 is 'Very important'.



Familiarity with Regions – Total BC

- Not surprisingly, major cities are the BC destinations with the highest levels of familiarity.
- Areas within the Thompson Okanagan have the most consistent familiarity. Visitors to this region may be more likely to travel throughout the area than other BC regions.



■ Very Familiar

■ Somewhat Familiar

Note: Only BC residents rated their familiarity with regions marked with a star (*)

Activities Participated In – By Region

- Visitors to BC were most likely to have participated in sightseeing, nature, wildlife viewing, shopping, hiking, visiting friends or relatives and visiting parks on their trip.
- Significant differences in activities participated in are highlighted in blue (higher) or pink (significantly lower).

Top Three Activities Mentioned	Region*						Total
	VCM	VI	TOTA	CCC	NBC	KR	
Sightseeing / nature or wildlife viewing	59%	63%	47%	50%	44%	53%	54%
Shopping	54%	60%	41%	34%	37%	41%	46%
Hiking	48%	37%	33%	49%	34%	44%	40%
Visiting friends, relatives	40%	38%	38%	39%	39%	28%	37%
Visiting national and/or provincial parks	29%	40%	26%	33%	26%	44%	34%
Visiting rural community or communities	21%	33%	25%	27%	31%	29%	28%
Visiting historical sites	21%	21%	17%	35%	27%	25%	24%
Visiting a large city or cities	31%	24%	14%	16%	22%	14%	21%
Other outdoor recreation activities	15%	20%	19%	23%	16%	22%	19%
Fishing	15%	15%	11%	34%	22%	7%	17%
Visiting a winery	11%	8%	39%	6%	8%	12%	14%
Arts and cultural activities	17%	15%	10%	11%	8%	9%	12%
Participating in water sports	9%	11%	20%	14%	5%	12%	12%
Attending festival or event	9%	13%	15%	13%	11%	7%	12%
Visiting aboriginal culture or heritage sites	13%	8%	6%	20%	18%	4%	11%
Biking	11%	9%	12%	14%	8%	8%	10%

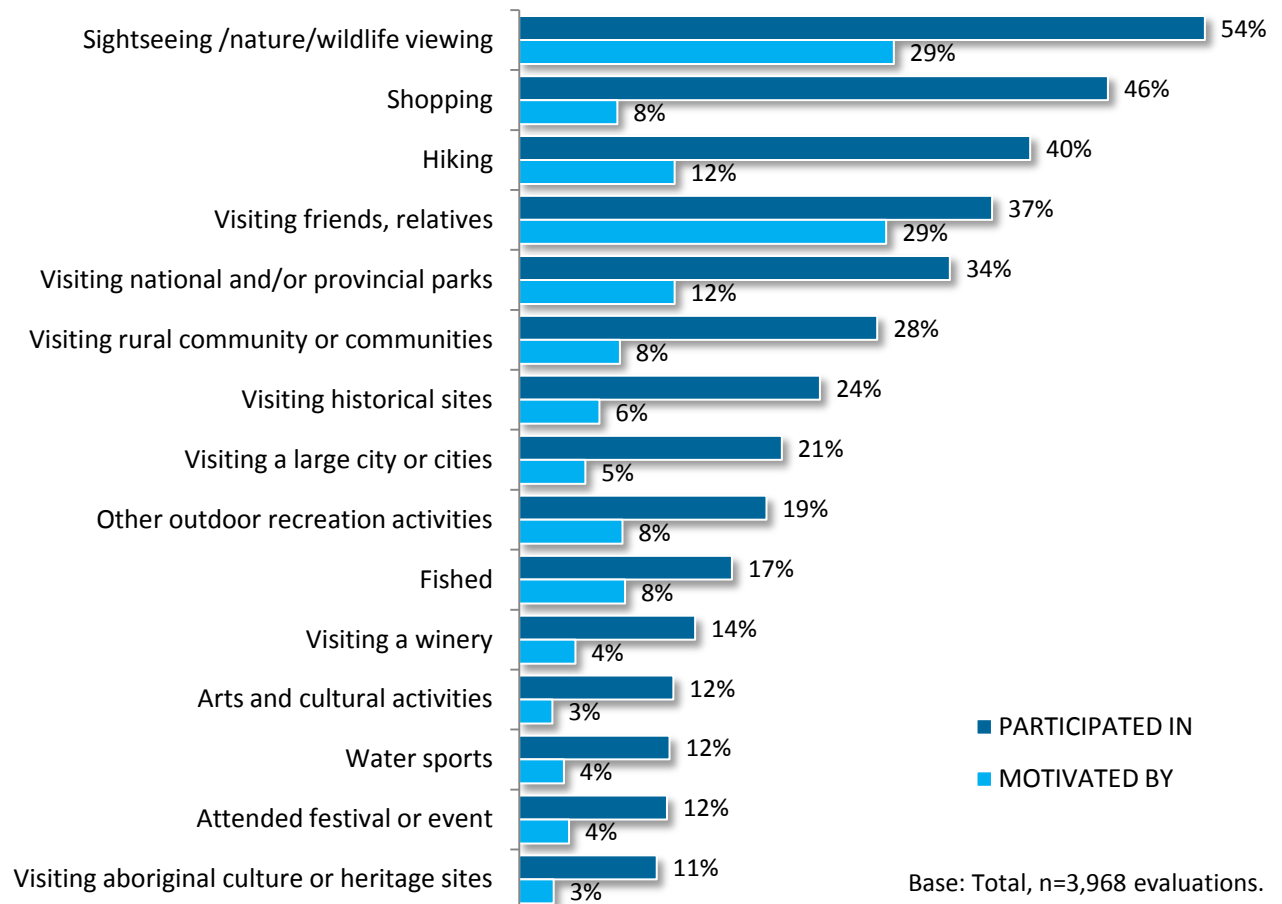
* Main urban centres were omitted from the following regional evaluations:
VCM: Vancouver, Richmond & Whistler. **VI:** Victoria. **TOTA:** Kelowna & Kamloops.



Motivating vs. Participating - Total BC

- Visitors to BC destinations participated in a far greater range of activities while on their trip than they were originally motivated by.
- The activities with the highest participation were not necessarily the most commonly motivating activities. For example almost half of respondents participated in shopping despite it only being a named motivating factor by 8%. Likewise, hiking motivated just 12% of respondents to take a trip, while 40% participated in this activity during their visit.

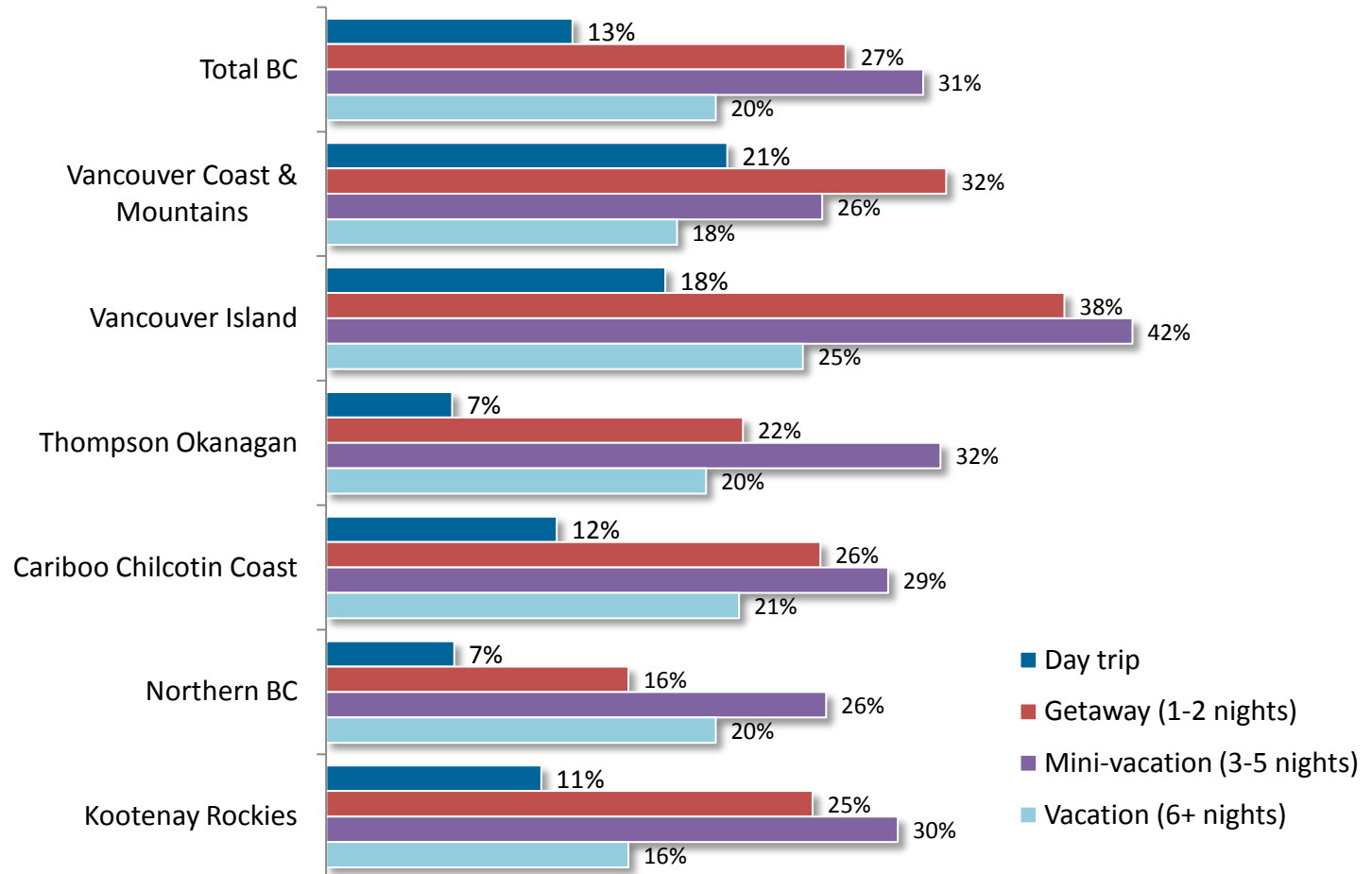
Motivating vs. Participating Activities



Type of Future Trips - By Region

- Overall, Vancouver Island destinations are most likely to be visited by respondents in the next 2 years for trips of any duration.
- Respondents were most likely to visit VCM destinations for a day trip while those likely to take a trip to the Cariboo Chilcotin Coast and Northern BC are more likely to take mini-vacations and vacations when they visit.

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



Base: Total, n=3,968 evaluations.

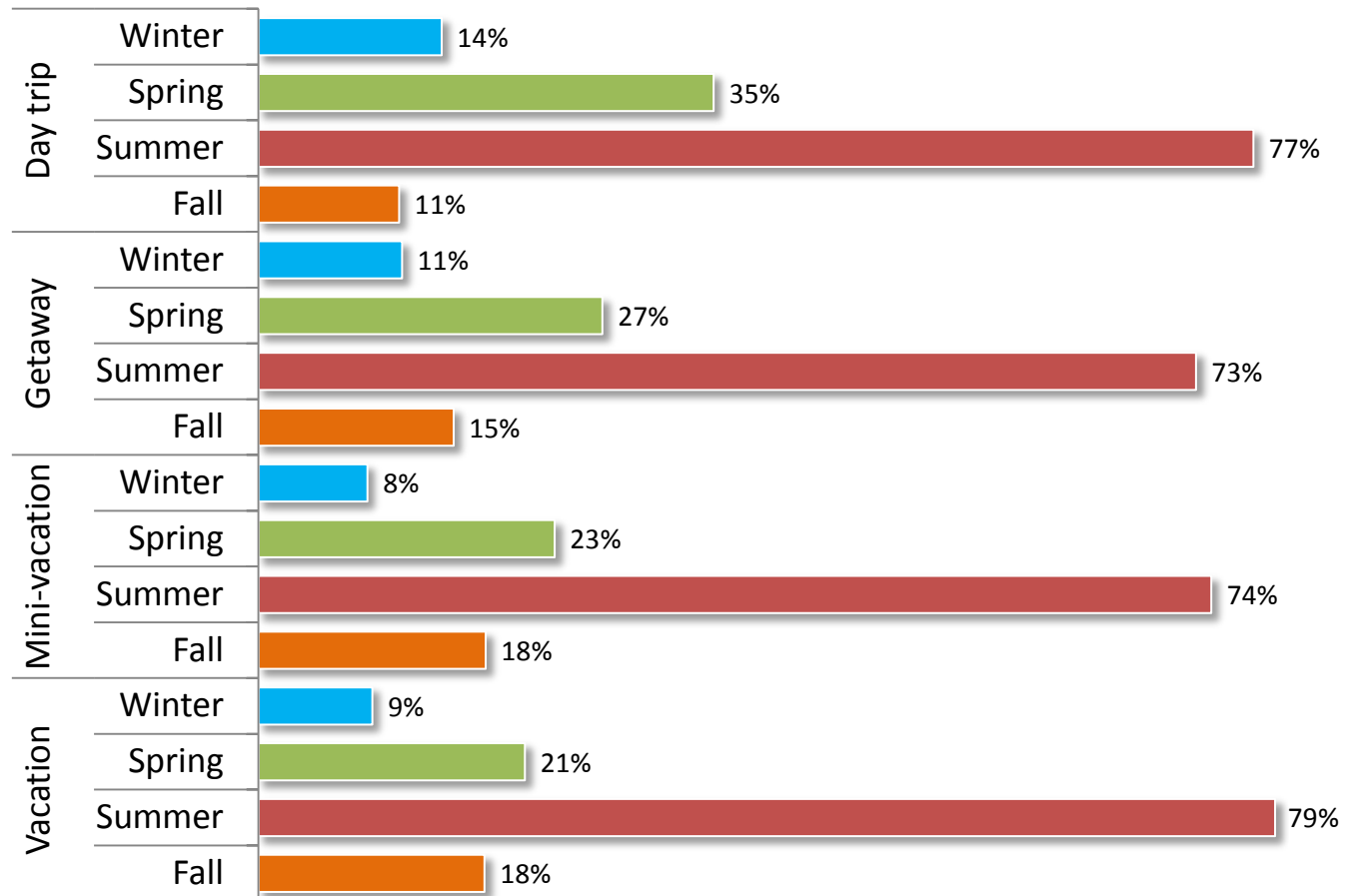


Season for Future Trips - Total BC

- For respondents likely to take a trip to a destination in BC in the next 2 years, summer is the most popular season for the trip.
- Winter and Spring trips are slightly more likely to be of shorter duration, while trips in the Fall are slightly more likely to be longer duration.



Season of Trip by Trip Type – Total BC



Main Activities on Future Trips – By Region

- Participation in outdoor recreation activities is the key motivator for return trips to any region in BC.
- Respondents are more likely to travel to CCC and NBC for outdoor recreation activities and less likely to travel to TOTA and CCC to experience scenery and nature. The VCM and KR regions are more likely than average to be visited for skiing and snowboarding. VI and TOTA destinations are more likely than average to be visited to relax and unwind.

Main Activity	Region						Total
	VCM	VI	TOTA	CCC	NBC	KR	
Outdoor recreation activities	48%	44%	49%	71%	60%	48%	53%
Experience scenery and nature	32%	29%	18%	14%	24%	31%	25%
Relax/unwind/rest	16%	26%	26%	18%	21%	20%	22%
Visit family/friends	11%	15%	9%	7%	18%	10%	11%
A trip to visit national and/or provincial parks	4%	4%	10%	5%	2%	6%	5%
Experience restaurants & night life	11%	6%	3%	-	3%	1%	5%
Skiing or snowboarding	7%	2%	2%	2%	2%	12%	4%
A trip to visit historical sites	1%	8%	1%	1%	3%	2%	3%
A trip to visit cities	1%	4%	2%	3%	4%	3%	3%
A trip to see arts and cultural activities	1%	1%	3%	1%	2%	-	1%
A romantic getaway	2%	1%	-	1%	-	2%	1%
Experience aboriginal people's culture and heritage	-	1%	-	1%	1%	1%	1%
Other	1%	7%	3%	7%	1%	-	4%
None	5%	1%	6%	5%	7%	3%	4%

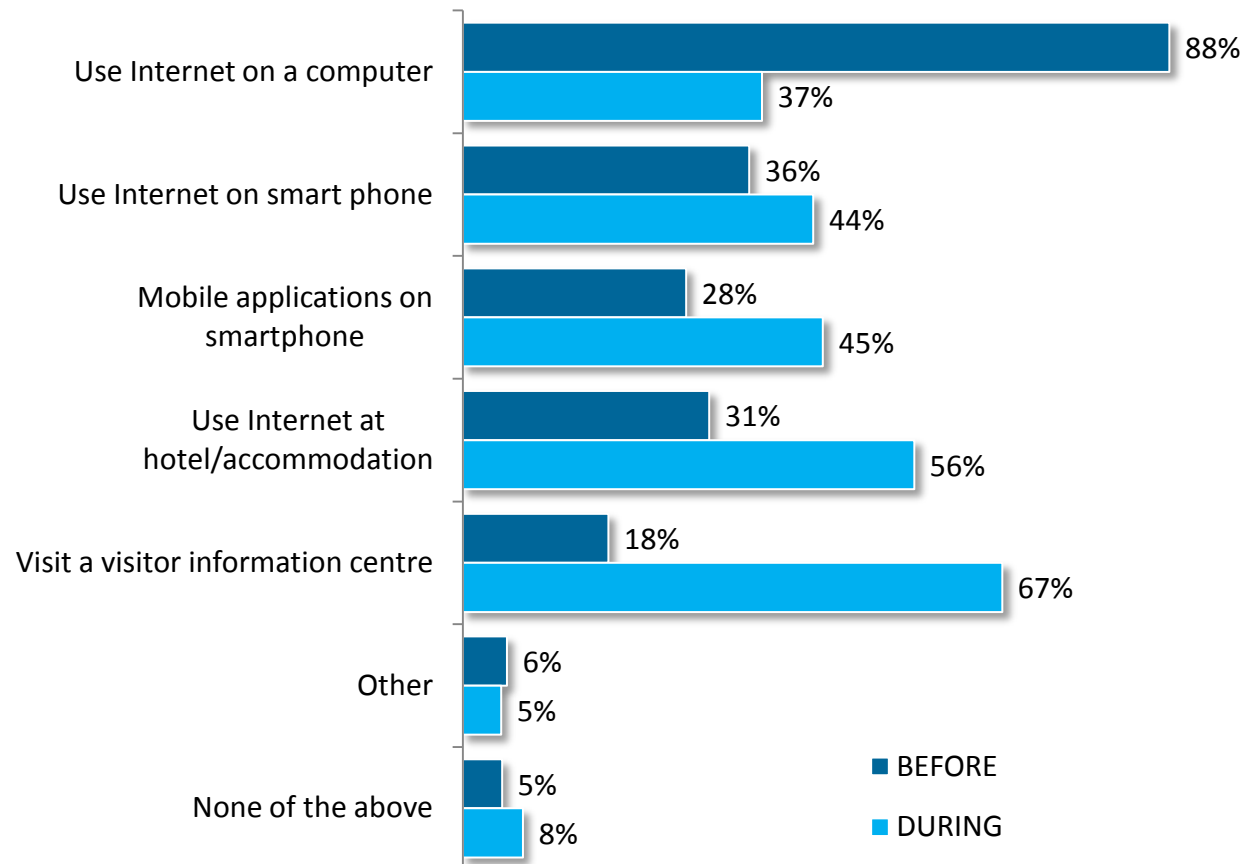


Future Trips – Total BC

- Visitors to BC are most likely to use the Internet on a computer as a pre-trip planning tool.
- During a trip, visitors would use a variety of planning tools, the most popular being visitor information centres, followed by using the Internet at a hotel or accommodation and using the Internet or an application on a smartphone for information.



Trip Planning Tools



Reasons for being unlikely to visit - By Region

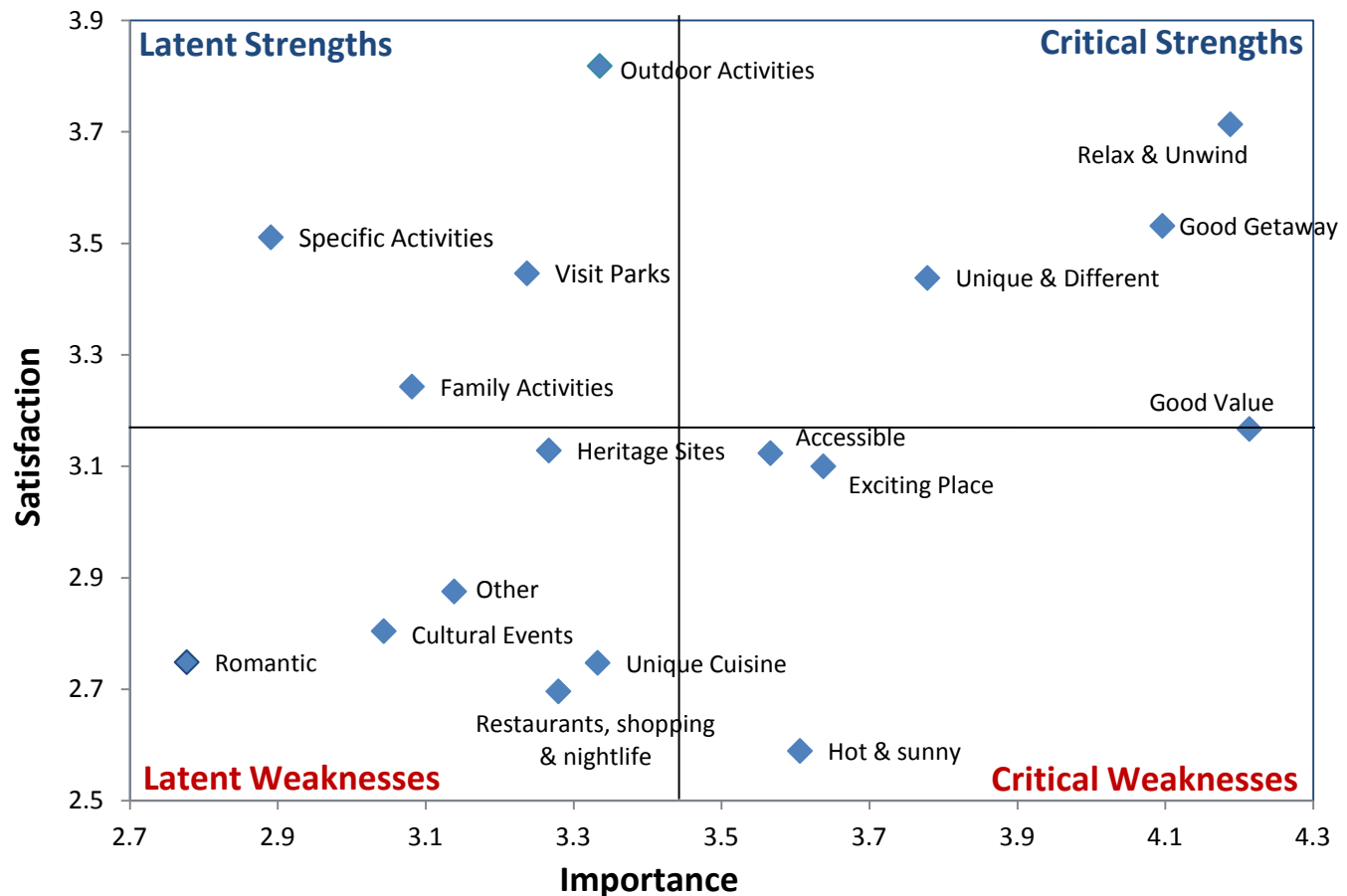
- Respondents cited no interest/no reason to visit and preferring to go somewhere else as key reasons for being unlikely to take a trip to the region they evaluated in the next two years.
- Cost, being too familiar and border hassles were more likely to be mentioned as reasons not to visit VI, not being interested for CCC, while NBC is more likely to be seen as too far to go and hard to get to. Respondents unlikely to visit KR were more likely than average to cite preferring to go somewhere else.

	Region						Total
	VCM	VI	TOTA	CCC	NBC	KR	
Not interested/No reason to go	26%	16%	34%	45%	33%	23%	31%
Prefer to go somewhere else / International travel	32%	23%	29%	25%	21%	33%	27%
Can't afford/Too expensive	16%	30%	9%	8%	11%	11%	13%
Too far to go	8%	3%	11%	5%	13%	10%	8%
Don't like climate	6%	7%	2%	4%	4%	6%	5%
Don't have the time	3%	2%	5%	7%	2%	7%	4%
Too familiar	2%	9%	5%	2%	3%	2%	4%
Border/passport hassle	2%	6%	1%	2%	1%	4%	2%
Haven't thought about it	-	-	1%	-	8%	-	2%
Hard to get to	3%	2%	2%	-	3%	1%	2%
Health issues	1%	1%	1%	-	2%	3%	1%
Other	-	1%	2%	1%	1%	3%	1%
Don't know	7%	9%	8%	8%	6%	7%	7%
Base: Unlikely to take trip n=	332	226	383	384	334	234	1892



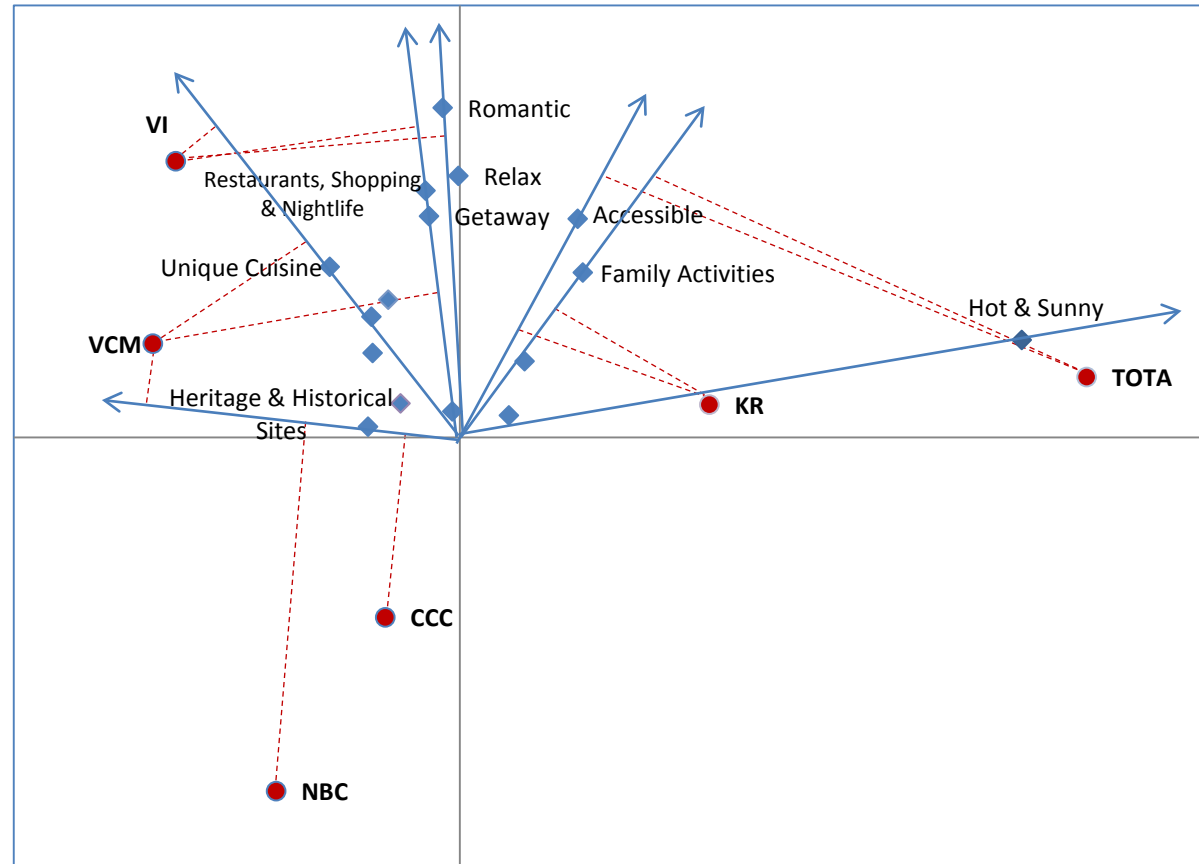
Factors Associated with BC – Importance/Satisfaction Matrix

- The importance/satisfaction matrix divides attributes into four quadrants based on the average importance and satisfaction scores (out of 5) for each attribute. The axis of the matrix shows the overall average importance and satisfaction scores for all attributes.
- Being a place to relax and unwind, a good getaway and being unique and different are critical strengths for BC. 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 BC - Positioning Map

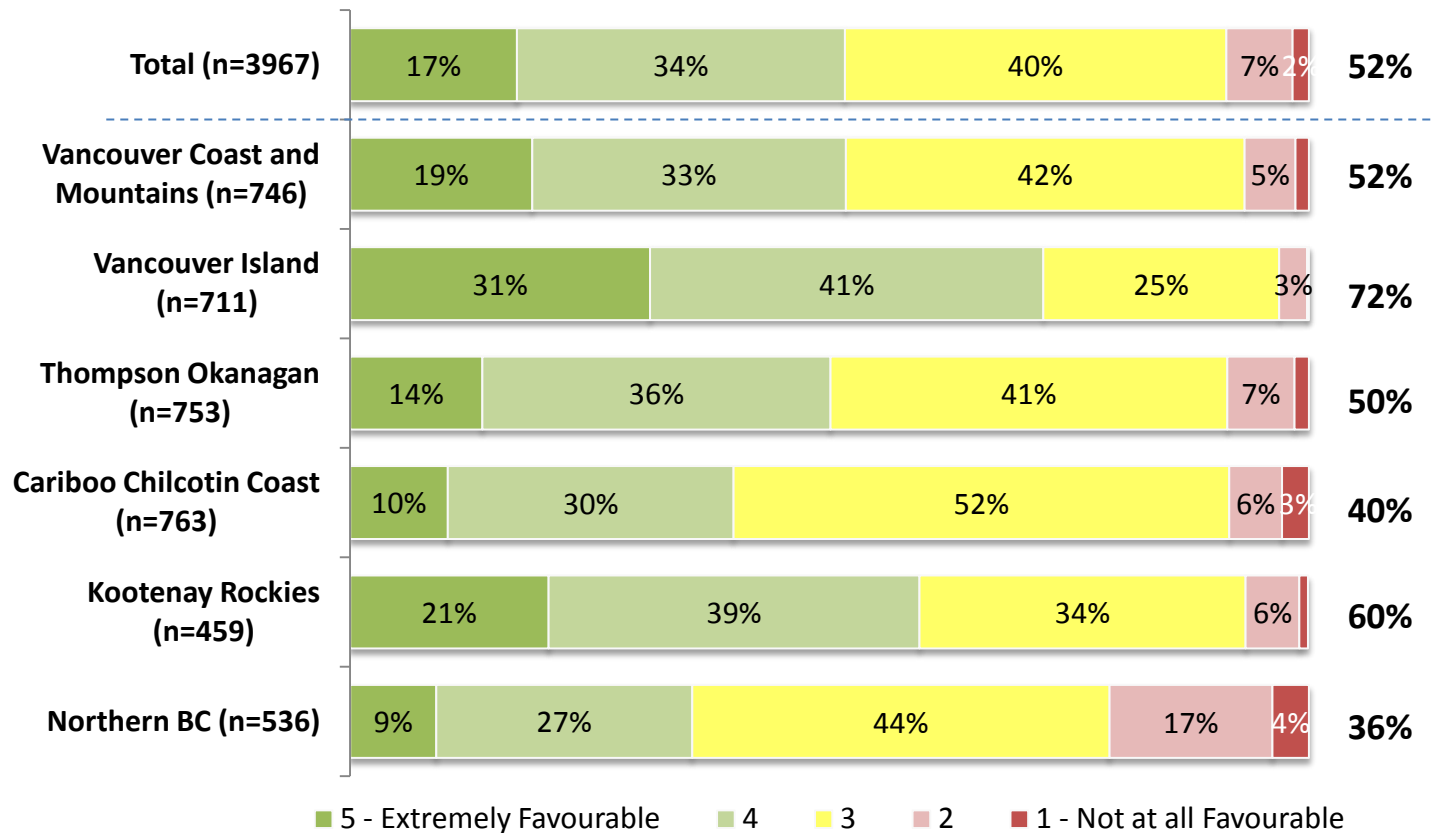
- This positioning map identifies attributes that have the best potential for differentiating between BC regions. Regions and attributes are placed on the map based on their association with one another. The red lines indicate potential regional positions.
- The most differentiated attributes include: A place that is hot and sunny, family activities, romantic, and accessible.
- TOTA has the most differentiated position overall. VCM and VI take similar positions around cuisine, shopping and getaways, KR is positioned around family activities and accessibility, while CCC and NBC hold relatively weaker positions in the minds of respondents.



Overall Impressions – By Region

- At a total level, just over half of respondents have a very favourable overall impression of the region they evaluated.
- Overall impressions of Vancouver Island are the most favourable of BC's tourism regions, followed by the Kootenay Rockies then Vancouver, Coast and Mountains.

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.

Base: Evaluated Region.

Implications to Consider

- Leverage the high levels of familiarity for Vancouver, Coast and Mountains, Vancouver Island, Thompson Okanagan and the Kootenay Rockies to build awareness of lesser-known areas within these regions.
- Focus primarily on building Cariboo Chilcotin Coast and Northern BC at a regional level, and the areas within in as a secondary objective.
- Maintain superior quality of service, availability of information and visibility of visitor centres. Visitors to BC tend to have a few activities planned but make most decisions about what to participate in during their trip, placing high dependence 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.
- Highlight the broad range of outdoor activities in BC and the uniqueness of the region. Outdoor recreation activities are a huge tourism draw, in particular hiking, fishing, water sports and biking. Placing emphasis on the variety of activities on offer will also help address the key barrier for those unlikely to visit the region in the next 2 years: not being interested and preferring a different destination.
- Temper messaging around the physical and wild elements of BC with more passive, comfort-oriented and relaxing pursuits to ensure that the interests of the wider target market are not overlooked.
- Provide information on activities that can be participated in during shoulder seasons. These times of the year offer the biggest opportunity for growth in tourism to BC.
- Focus on growing BC's association with elements that are most important to visitors but receive mid-level satisfaction ratings: good value for money, accessibility and an exciting place to be.

